Enabling Customer Centricity

Optimal Strategix Group
UPenn Information Session

October 28, 2014
Agenda

Introductions

Overview of Market Research

- How do Advanced Degrees fit in?

Who is OSG?

- What makes us unique?
- Our Methodology
- Examples

Opportunities

The Fun Side – Our Culture
Introductions

Alyssa Klein, PhD – Senior Director, Delivery Services

Denise Houser – Director, Human Resources

Michelle Murphy, MBA – Senior Associate, Delivery Services

Devon Brackbill, Annenberg PhD Student – 2014 Intern @ OSG
Alyssa Klein, PhD

Background

• BA in English, Nonfiction Writing (*2001: UPenn*)
• PhD in Communication (*2011: Annenberg*)
  – Dissertation: Evaluating dimensions of messages exchanged in online support groups for breast cancer patients (and potential effects, though there weren’t many 😊!)

Career History

• Medical Publishing (*1999-2002*)
  – Gained interest in pharmaceutical industry through writing and editing for advertising agencies, pharmaceutical companies, and industry publications
• Academic Research (*2002-2006*)
  – Various health-related research teams (NIDA, CECCR, etc)
  – Methods TA
• Market Research (*2006-present*)
  – 2006 – 2010: @Futures, custom research firm specializing in prescribing dynamics for major pharmaceutical clients
  – 2010 – 2013: Nielsen, mainly forecasting for major pharmaceutical clients
  – 2013 – present: OSG, highly diverse project types in life sciences, consumer healthcare, and many other industries
A career in market research…

At some point, I just needed to see what research could do in the “real” world....
My market research journey...

Modeling decision making behavior – understanding how patient and product characteristics lead to physician’s prescribing choices (mostly forecasting)

Forecasting in pharma, but also exposure to the “machine” that is Nielsen – power of data, data, data!

Innovation! Helping companies design new products or more effectively market their existing products by understanding the unmet needs of their customers
Agenda

Introductions

Overview of Market Research
  ▶ How do Advanced Degrees fit in?

Who is OSG?
  ▶ What makes us unique?
  ▶ Our Methodology
  ▶ Examples

Opportunities

The Fun Side – Our Culture
What is market research?

Market research is any organized effort to gather information about customer’s needs and preferences

- Many forms (primary, secondary data)
- Many types (qualitative, quantitative, data mining)
- Many objectives (health of current brands? development of future brands? Who are my customers?)
Why does market research exist?

Moments of Truth
THE KICKOFF

WE SIT HERE TODAY WITH OUR BEST AND
BRIGHTEST, DRIVEN BY A CLEAR MANDATE TO
GROW OUR BUSINESS, AND WE CURRENTLY KNOW DIDDLY
SQUAT ABOUT WHAT’S MOTIVATING OUR CONSUMERS

IS DIDDLY SQUAT STATISTICALLY SIGNIFICANT?

Liberating Consumer Intelligence. Empowering Marketers.

MOTISTA
Motista.com
How do advanced academic degrees fit?

The goals of most market research projects are very similar to academic research in the social sciences – we are trying to **understand how people are behaving and why**.

Academic research, introduced into the marketing world, became the father of market research.

- Therefore, **the process is quite similar** – just faster!
- However, the applications are quite different.

We need people who have the **rigorous research methods and analytical skills** to drive design, analysis, and interpretation of our research projects.
Effective market research drives strategy. We help our clients avoid this situation:
A few examples of projects…

A client wants to design a patient “rewards” program to help encourage compliance. What are the potential benefits that would be most appealing and motivating to patients?

A client wants to understand which product features will be best received by the target audience. What levels of safety and efficacy do they need to hit in order to be successful in the marketplace?

A client wants to develop a new line of products that will work across all of their global markets. What are the most common features and platforms which the products should be built upon?

A client wants to understand how to most effectively spend the dollars they have to sponsor medical education opportunities for physicians as they prepare to launch a new drug. What are the biggest gaps in what’s available today?
Why is it a great career?

- Exciting
- Learning something new, everyday
- Become an expert
- Fast-paced
- Have instant impact
Agenda

Introductions

Overview of Market Research

- How do Advanced Degrees fit in?

Who is OSG?

- What makes us unique?
  - Our Methodology
  - Examples

Opportunities

The Fun Side – Our Culture
Who is OSG?

OSG is a Strategic Marketing Consulting and Analytics Firm with Global Resources and World Class Clients

Primary offices in Newtown, PA and Bangalore, India
• Additional offices around the country/globe
How do we create value for our global clients?

Our Core Competency is to Enable Customer Centricity:
Provide and Leverage Fact-Based Insights to Drive Client Innovation and Growth

OSG Client Engagements (# of Engagements)

- Life Sciences: 60%
- Consumer Related: 25%
- B2B: 15%

FOCUS: BUSINESS RESULTS

- Deep Business Leadership: Academic, Market Research, Business/Industry
- Proprietary, Cutting Edge Methodologies and Technologies
- World-class Primary and Secondary Data Analytics

© 2014 Optimal Strategix Group
...By focusing on the customer & building a fact base to drive strategic decision making and guide activation efforts

Opportunity Assessment

- What are the future sources of growth for business?
- How attainable are the identified growth prospects?
- What are the hypotheses for accessing growth? Can business satisfy requirements?

Growth Strategy

- How does the market segment?
- Which segments should we target?
- What value proposition will create appeal & a sustainable competitive advantage with target(s)

Go-To-Market Strategy

- What customer experience will deliver value proposition?
  - Offering (Product & Service)
  - Brand/Communication
  - Channel
  - Pricing

Empirical Customer & Market Insights
OSG: Leading publications for thought leadership in marketing strategy and consumer research

- OSG’s leadership has been featured in numerous business magazines in recognition of their depth of knowledge in consumer marketing
- OSG’s senior management have served as expert witnesses in high-profile US corporate law cases (e.g., Apple & Samsung patent case) thanks to their expertise in market research
- OSG outlines a comprehensive approach to understanding customer sentiment and drivers of purchase behavior
- OSG shares how CMOs work with CIOs to leverage organizational data to provide holistic customer insight
Methodology: ASEMAPP℠ – Adaptive Conjoint Trade-off Exercise

Optimal Strategix Group uses a unique methodology (ASEMAP℠) to derive a true understanding of the importance of the many factors of the offer that influence customer decisions.

ASEMAP℠ is a conjoint methodology that is proven to perform best at understanding customer decision making in the real world.

The rich understanding of the customer is complimented by the addition of demographic, behavioral, perceptual and attitudinal data. This added context allows for more specific recommendations for growth.

• In ASEMAPP℠, every respondent reviews all the stimuli in providing their preferences for drivers, providing more robust, detailed and actionable insights.

• Each respondent performs trade-offs between adaptively selected pairs of attributes, answering the question “Which one is more important to you? By how much more?”
  • The smart algorithm adapts to responses given, and shows the pairs needed
ASEMAP™ - Adaptive Conjoint Trade-Off Exercise in practice

1. Review and Sort

Please continue to think about a head-only MRI unit. Please click and drag the attributes on this page so they are ordered from most important (on the top) to least important (on the bottom).

Please pay as much attention to the attributes near the bottom as you do to those near the top.

<table>
<thead>
<tr>
<th>Rank</th>
<th>Attribute</th>
<th>Most Important</th>
<th>Least Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Field strength</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Siting requirements</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Field of view</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Patient throughput</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Image quality</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Pediatric patient-friendly</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Field strength</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. Rank

1. Review and Sort

2. Rank

3. Trade-off

When selecting a head-only MRI unit, which of the two attributes below is more important to you? By how much more?

- The length of the bar represents how important each attribute is to you.
- If, for example, one attribute is twice as important to you as the other, click on the blue bar at its right edge and drag it to make it twice as long as the other.

Assume that all other attributes are the same.

- Field Strength: 80
- Patient Experience: 20

Note: This shows a visual for illustrating purposes only and does not represent actual data or relationships.

4. Validation (optional)

Section 5 - an initial treatment for locally or regionally advanced squamous cell carcinoma of the head and neck Likelihood to Prescribe

Shown below is a treatment. Assume that all its other attributes are unchanged. Click on the blue colored bar at its right edge and drag it to indicate how likely you are to select this treatment.

- Lecogerial control: 15 months
- Mode of administration: Intravenous infusion
- Incidence of pulmonary toxicity: 0.4%
- Incidence of rash: 15%

- Definitely Not
- Maybe or might not
- Definitely will

© 2014 Optimal Strategix Group
ASEMAP℠ > Methodology Key Step > Adaptive Pair-Wise Comparisons

In ASEMAP℠, questions are asked using an adaptive self-explicated trade-off methodology. Every respondent reviews all the stimuli in providing their preferences for drivers of equity, providing more robust, detailed, and actionable insights.

Each respondent performs trade-offs between adaptively selected pairs of attributes, answering the question “Which one is more important to you? By how much more?” (see screenshot below)

- The smart algorithm adapts to responses given, and shows the pairs needed.

![Screenshot of adaptive pair-wise comparisons](image-url)

Which of the requirements below is more important to you when choosing a canine oncology drug? By how much more?
The length of the bar represents how important each benefit is to you. If, for example, one message is twice as important to you as the other, click on the blue bar at its right edge and drag it to make it twice as long as the other.

Assume that all other attributes are the same.

- Side Effects
- Efficacy Onset

The two items presented on this screen are in the relative order that you designated within the previous ranking section. However, please feel free to assign a greater value to whichever item that you now feel is more important.
The Adaptive Self-explicated Method (ASEMAP℠) offers a more efficient and accurate approach to gaining insight

### Efficiency

- Each respondent is modeled in real time
- Results are available soon after field, since modeling doesn’t require aggregate data
- Results tracked while project is in field – partial results can be provided
- Smaller samples can be used – in total, or to profile sub-groups
- Including more attributes does not require greater sample size
- Can be used as a module in qualitative research

### Accuracy

- Best-in-class predictive accuracy
- Adaptive software focuses respondents on attributes of their individual greatest interest, maintaining their interest and involvement
- Greater respondent engagement improves data quality with no increase in questionnaire length

### Insight

- Include all relevant choice drivers, as ASEMAPP can include more attributes and levels than standard methods, and can consist of *product characteristics* as well as *functional and emotional benefits sought*
- Determine which drivers are most important, as ASEMAPP generates greater differentiation among attributes
- Needs-based segmentation can be done since each respondent is modeled individually
A differentiated and powerful approach: ASEMAP Trade-Offs determine the true magnitude of importance in a choice decision

<table>
<thead>
<tr>
<th>Standard Approach</th>
<th>OSG Approach</th>
</tr>
</thead>
</table>
| **Rate the following on a scale of 1 to 5, where:**  
1= Not at All Important and 5= Very Important | **Indicate the importance of each attribute in comparison to the other** |
| Eye Comfort | Cost |
| Vision Clarity | Eye Comfort |
| Long-Wearing | Eye Comfort |
| Cost | Vision Clarity |

More noise: Less variability of response and differentiation

Greater Signal: High variability of response and differentiation

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Standard Approach</th>
<th>OSG Approach</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost</td>
<td>1 2 3 4 5</td>
<td>33%</td>
</tr>
<tr>
<td>Eye Comfort</td>
<td>1 2 3 4 5</td>
<td>66%</td>
</tr>
<tr>
<td>Vision Clarity</td>
<td>1 2 3 4 5</td>
<td>60%</td>
</tr>
<tr>
<td>Long-Wearing</td>
<td>1 2 3 4 5</td>
<td>40%</td>
</tr>
<tr>
<td>Cost</td>
<td>1 2 3 4 5</td>
<td>30%</td>
</tr>
<tr>
<td>Eye Comfort</td>
<td>1 2 3 4 5</td>
<td>70%</td>
</tr>
</tbody>
</table>
ASEMAP℠ informs a spectrum of business questions

**Customer Choice**

<table>
<thead>
<tr>
<th>Innovation</th>
<th>Segments &amp; Targeting</th>
<th>Satisfaction &amp; Loyalty</th>
<th>Competitive Intelligence</th>
<th>Pricing</th>
<th>Value Proposition Validation</th>
<th>Messaging &amp; Positioning</th>
</tr>
</thead>
<tbody>
<tr>
<td>• What features are most important to customers?</td>
<td>• How do customers make purchase decisions? Which customers should we target that are most attractive?</td>
<td>• Which dimensions of the customer experience determine customer loyalty?</td>
<td>• How are competitors performing in the market? What are our competitive alternatives?</td>
<td>• What elements of customer choice contribute to the price they are willing to pay? How do we price to optimize profit and capture value?</td>
<td>• How do we differentiate in the market? What do customers value that we can address?</td>
<td>• Which messages resonate best? How are we perceived in the market? How can we convey our value?</td>
</tr>
</tbody>
</table>
### RESULTS: What drives customer choice becomes apparent

This requires modeling how customers make choices and serves as the underpinning across the commercialization process:
- Concept Evaluation
- Innovation Pipeline
- Segmentation
- Messaging/Positioning
- Pricing
- Customer Satisfaction

![Table of Drivers by Adoption Behavior](image)

<table>
<thead>
<tr>
<th>Drivers</th>
<th>All Respondents N=185</th>
<th>Early Adopters N=70</th>
<th>Followers N=106</th>
<th>Laggards N=9</th>
</tr>
</thead>
<tbody>
<tr>
<td>Efficacy of treatment at different stages of osteoarthritis</td>
<td>203</td>
<td>204</td>
<td>204</td>
<td>185</td>
</tr>
<tr>
<td>Risk of severe short-term side effects for an injectable pain control product (e.g. anaphylactic reaction)</td>
<td>189</td>
<td>208</td>
<td>179</td>
<td>163</td>
</tr>
<tr>
<td>Duration of effect for a long-acting pain control product</td>
<td>129</td>
<td>123</td>
<td>132</td>
<td>146</td>
</tr>
<tr>
<td>Concomitant use with NSAIDs or steroids</td>
<td>128</td>
<td>116</td>
<td>135</td>
<td>129</td>
</tr>
<tr>
<td>Cost to the veterinarian of 1 monthly treatment with an injectable pain product relative to 1-month cost for a typical oral daily NSAID</td>
<td>127</td>
<td>126</td>
<td>128</td>
<td>126</td>
</tr>
<tr>
<td>Onset of effect of pain control product with duration of at least one month</td>
<td>123</td>
<td>120</td>
<td>122</td>
<td>151</td>
</tr>
<tr>
<td>Patient monitoring requirements during treatment with long-term pain control product</td>
<td>93</td>
<td>94</td>
<td>92</td>
<td>101</td>
</tr>
<tr>
<td>Risk of mild short-term side effects for an injectable pain control product (e.g. mild injection site swelling, short term lethargy)</td>
<td>87</td>
<td>98</td>
<td>80</td>
<td>82</td>
</tr>
<tr>
<td>Flexible dosing</td>
<td>80</td>
<td>74</td>
<td>83</td>
<td>80</td>
</tr>
<tr>
<td>Mode of administration for an injectable pain control product with duration of at least one month</td>
<td>66</td>
<td>65</td>
<td>66</td>
<td>71</td>
</tr>
<tr>
<td>Drug shelf life</td>
<td>63</td>
<td>59</td>
<td>65</td>
<td>57</td>
</tr>
<tr>
<td>Treatment mechanism</td>
<td>62</td>
<td>62</td>
<td>63</td>
<td>52</td>
</tr>
<tr>
<td>Administration requirements for monthly injectable pain product</td>
<td>58</td>
<td>58</td>
<td>57</td>
<td>60</td>
</tr>
<tr>
<td>Level of manufacturer trust</td>
<td>53</td>
<td>54</td>
<td>51</td>
<td>60</td>
</tr>
<tr>
<td>Vial presentations for treatment with a monthly subcutaneous injectable pain product</td>
<td>41</td>
<td>38</td>
<td>43</td>
<td>37</td>
</tr>
</tbody>
</table>

ASEMAP Attribute Paired Comparison: When choosing which pain control products for canine osteoarthritis to prescribe, which of the two attribute below is more important to you? By how much more?
What are the Important Benefits Sought by Consumers?

- The most important benefits sought by consumers will be identified, enabling the development of potential products that are most likely to meet market needs.
- Results can be compared across different target markets to identify benefits that are most important to both overall and key target markets.

**Top 10 Drivers of Choice, Overall and by Subgroup**

<table>
<thead>
<tr>
<th>Key Drivers of Muscle Pain Treatment Choice by Gender</th>
<th>All Respondents N=157</th>
<th>Male N=53</th>
<th>Female N=94</th>
</tr>
</thead>
<tbody>
<tr>
<td>This product provides complete relief from muscle pain</td>
<td>171</td>
<td>185</td>
<td>161</td>
</tr>
<tr>
<td>This product relieves muscle pain quickly and is long-lasting to keep it from coming back</td>
<td>169</td>
<td>154</td>
<td>179</td>
</tr>
<tr>
<td>This product prevents muscle pain</td>
<td>142</td>
<td>114</td>
<td>161</td>
</tr>
<tr>
<td>This product relieves even my worst muscle pain</td>
<td>137</td>
<td>119</td>
<td>149</td>
</tr>
<tr>
<td>This product provides targeted pain relief with few side effects</td>
<td>133</td>
<td>138</td>
<td>129</td>
</tr>
<tr>
<td>This product provides long-lasting muscle pain relief</td>
<td>132</td>
<td>140</td>
<td>126</td>
</tr>
<tr>
<td>This product relieves muscle pain directly at the source of the pain</td>
<td>128</td>
<td>107</td>
<td>142</td>
</tr>
<tr>
<td>This product provides relief from all types of muscle pain (ex. back pain, knee pain, neck &amp; shoulder pain, etc.)</td>
<td>128</td>
<td>118</td>
<td>134</td>
</tr>
<tr>
<td>This product relieves muscle pain fast</td>
<td>127</td>
<td>134</td>
<td>122</td>
</tr>
<tr>
<td>This natural, herbal product has been clinically proven to effectively relieve pain</td>
<td>125</td>
<td>96</td>
<td>144</td>
</tr>
</tbody>
</table>
# How do consumers view performance?

## Brand Satisfaction

<table>
<thead>
<tr>
<th>Top 10 Attributes</th>
<th>Brand Perception*</th>
</tr>
</thead>
<tbody>
<tr>
<td>This product starts to work very fast</td>
<td>Dolornin extra</td>
</tr>
<tr>
<td>This product fully relieves your headache fast</td>
<td>ASPIRIN</td>
</tr>
<tr>
<td>This product relieves all types of headaches</td>
<td>ASPIRIN plusc</td>
</tr>
<tr>
<td>This product is effective on your toughest headache</td>
<td>Thomapyrin</td>
</tr>
<tr>
<td>This product eliminates headaches without harmful side effects</td>
<td>Paracetamol-ratiopharm 500 mg</td>
</tr>
<tr>
<td>This product provides complete relief from your headache symptoms</td>
<td>Ibuprofen</td>
</tr>
<tr>
<td>This product relieves headaches and protects your stomach from damage over time</td>
<td></td>
</tr>
<tr>
<td>This product provides relief on the first dose so that you don’t have to take additional medicine later</td>
<td></td>
</tr>
<tr>
<td>This product relieves your headache at the first sign of pain</td>
<td></td>
</tr>
<tr>
<td>This product gets into your system fast to relieve your headache</td>
<td></td>
</tr>
</tbody>
</table>

### Legend

- **Best performance**
- **Better than average performance**
- **Average performance**
- **Less than average performance**
- **Worst performance**

*Sample sizes are low for Dolormin and Thomapyrin on some attributes; please interpret with caution.*
How to Read Identifying Emerging Growth Opportunities

**Entry Ticket:** Brands differentiated around required attributes; Needs are satisfied by some brands

- No (or low) market opportunity
- Current brands do have some differentiation
- “Must-haves” to play in this market
- Need to meet or exceed current brand threshold

**Brand Evolution:** Brands are differentiated; Unmet needs exist

- Large market opportunity (unmet needs)
- But, some current brands may have differentiation or ownership
- Entry requires gaining rapid brand recognition and differentiation

**Indifferent:** Brands tightly clustered around required attributes; Needs are satisfied by market

- Low market opportunity
- Current brands are undifferentiated
- Not meeting the minimum threshold will hurt the new brand, but exceeding it may not yield meaningful gains
- Needs are perceived to be satisfied

**Market Development:** Brands are undifferentiated; Unmet needs exist

- Large market opportunity (unmet needs)
- Current brands lack voice
- Need to educate (create) market
- Opportunity to create unique differentiation

**Note:** The above chart is for illustrative purposes only and demonstrates possible output. It does not represent actual data or relationships.
Identifying Emerging Growth Opportunities

Entry Ticket
“Stay in the Game”

Brand Evolution
“Win the Game”

Attribute Importance

Indifferent
“Make no Difference”

Met

Needs

Unmet

- Long-lasting relief
- Fast relief
- Fast relief and long-lasting
- Prevents pain
- Effective as Rx
- Relief at pain source
- Sleep through night
- Better physical and mental health
- Repairs muscle damage
- Removes toxins from body
- Efficacy of OTC and gentleness of natural ingredients
- Releases muscle tension
- Reduces swelling & inflammation
- Fewer side effects
- Prevents tolerance build up
- Safe with other medications
- Everyday pain relief
- Wake up with less pain
- Relieves even worst pain

Plot Area
• Speed of action is a “must have” attribute for a product to compete in the marketplace.

• Consumers place high value on products that start to work in 5 minutes or less. Significant drop in value is noted when the time it takes for a product to work increases beyond 10 minutes.

• Dolormin outperforms competition on this attribute.

* Sample sizes are low for Dolormin and Thomapyrin on some attributes; please interpret with caution.
Differentiating Needs by Segment

Segment 4 - Normalcy Solicitant
- Helps you get back to normal while reducing your headache/migraine
- Easy to swallow
- Release pain-relieving medicine over time to keep pain from coming back
- Package that is easy to open and close
- Builds your body’s ability to resist headache/migraines
- Recommended by people who understand headache/migraines
- Taken in the morning to start your day headache/migraine free

Segment 1 - Speed Scout
- Starts to work very fast
- Relieves your headache/migraine at the first sign of pain
- Used at the first sign of a headache/migraine before you choose to take a pain reliever

Segment 3 - Safety Seeker
- Relieves headache/migraines and protects your stomach from damage over time
- Eliminates headache/migraines without harmful side effects
- Gets into your system fast to relieve your headache/migraine
- Relieves headache/migraines without being absorbed into the body
- Used at the first sign of a headache/migraine so you don’t have to take medicine
- Easy to carry so I have it available at any time
- Treat my headache/migraine with only the exact amount of medicine needed as to avoid side effects

Segment 2 - Strength Stumper
- Effective on your toughest headache/migraine
- Provides complete relief from your headache/migraine symptoms
- Allows you to feel the pressure releasing from your head and neck
- Relieves your headache/migraine so you can sleep through the entire night
SEGMENT 1 - SPEED SCOUT

HEADACHE VS. MIGRAINE

**Headache Sufferers** = 49%
**Migraine Sufferers** = 51%

**SEVERITY**
- Headache = Moderate
- Migraine = Moderate (only segment with Mild sufferers)

**DEMOGRAPHICS**
- **Age Group** = 20-49 (largest % in 40-49)
- **Gender** = More likely to be female
- **Marital Status** = Least likely to be married
- **Parent** = More likely to be a parent
- **Education** = Better educated

**CAUSES OF PAIN**

<table>
<thead>
<tr>
<th>Causes/Triggers</th>
<th>Head</th>
<th>Migraine</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top Cause</td>
<td>Stress</td>
<td>Stress</td>
</tr>
<tr>
<td>Differentiating Cause</td>
<td>Stress</td>
<td>Stress</td>
</tr>
</tbody>
</table>

**GENERAL OUTLOOK ON LIFE**
- I am very diligent about caring for my family
- I have a positive outlook about my future
- I am happy with my job/career

**PHYSICAL WELL-BEING**
- My appearance/looks are important to me
- I feel a lot of pressure to keep myself looking good/attractive

**EMOTIONAL WELL-BEING**
- I believe that being optimistic will keep me healthy
- I am happy with my emotional health
- I am happy with my day-to-day energy level

**DIFFERENTIATING NEEDS**
- This product starts to work very fast
- This product fully relieves your headache/migraine fast
- This product relieves your headache/migraine at the first sign of pain

**DIFFERENTIATING ATTITUDES**
- This product starts to work very fast
- This product relieves your headache/migraine at the first sign of pain
- This product is used at the first sign of a headache/migraine before you choose to take a pain reliever

**TOP BRANDS USED**

<table>
<thead>
<tr>
<th>Head</th>
<th>Migraine</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dolormin Extra = 47%</td>
<td>Dolormin Migrane = 43%</td>
</tr>
<tr>
<td>Aspirin Migrane = 43%</td>
<td>Migranal = 32%</td>
</tr>
<tr>
<td>Sumatriptan generics = 32%</td>
<td>Other Rx Meds = 32%</td>
</tr>
<tr>
<td>Metamizol generics = 25%</td>
<td>Novalgin = 21%</td>
</tr>
<tr>
<td>Ibuprofen 400 mg OTC generics = 42%</td>
<td>Dolormin Extra = 22%</td>
</tr>
<tr>
<td>Paracetamol Ratiopharm = 34%</td>
<td></td>
</tr>
<tr>
<td>Aspirin+C = 32%</td>
<td></td>
</tr>
<tr>
<td>Novalgin = 25%</td>
<td></td>
</tr>
<tr>
<td>Metamizol generics = 25%</td>
<td></td>
</tr>
</tbody>
</table>

**DOLOORMIN SATISFACTION (T2B)**

<table>
<thead>
<tr>
<th>Head</th>
<th>Migraine</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dolormin Extra = 67%</td>
<td>Dolormin Migrane = 86%</td>
</tr>
</tbody>
</table>

**BEHAVIOR**

<table>
<thead>
<tr>
<th>Treatments</th>
<th>Head</th>
<th>Migraine</th>
</tr>
</thead>
<tbody>
<tr>
<td>OTC</td>
<td>98%</td>
<td>70%</td>
</tr>
<tr>
<td>Non-medicinal</td>
<td>26%</td>
<td>42%</td>
</tr>
<tr>
<td>Rx</td>
<td>10%</td>
<td>44%</td>
</tr>
<tr>
<td>Nothing, waited to pass</td>
<td>7%</td>
<td>9%</td>
</tr>
<tr>
<td>Doctor’s visit</td>
<td>12%</td>
<td>28%</td>
</tr>
<tr>
<td>Professional services</td>
<td>2%</td>
<td>5%</td>
</tr>
</tbody>
</table>

© 2014 Optimal Strategix Group
Agenda

Introductions

Overview of Market Research
  ▸ How do Advanced Degrees fit in?

Who is OSG?
  ▸ What makes us unique?
  ▸ Our Methodology
  ▸ Examples

Opportunities

The Fun Side – Our Culture
Opportunities

Analyst
Associate
Senior Associate
Project Manager
Director

Internships
Agenda

Introductions

Overview of Market Research
  - How do Advanced Degrees fit in?

Who is OSG?
  - What makes us unique?
  - Our Methodology
  - Examples

Opportunities

The Fun Side – Our Culture
“We Love to Have Fun”
“We Love to Have Fun”

Q3 Community Service Day

OSG Team