

“A primary care physician, or PCP, is a physician/medical doctor who provides both the first contact for a person with an undiagnosed health concern as well as continuing care of varied medical conditions, not limited by cause, organ system, or diagnosis.”

There is a battle brewing between Primary Care Physicians and Specialists that will affect traditional patient care patterns and in turn pharmaceutical and diagnostic device manufacturers.

The Obama Administration in an effort to address the shortage of Primary Care Providers is considering several reform proposals including: increased Medicare payments to PCPs, additional funding of PCP Residency training positions, increased use of Nurse Practitioners and Physician Assistants, and expansion of the National Health Service Corps. Funding for these proposals could come at the expense of the Specialist. And, as healthcare reform provides expanded coverage for more patients there will be an urgent need for more Primary Care Providers.

Adding additional pressure to the PCP versus Specialist conflict are: increased financial shortfall in PCP practices, more sophisticated PCP training for assessing and treating a wider range of diseases, and advanced diagnostic technologies that allow the PCP to accurately provide better care and to keep patients longer. The specialist role in the referral process appears to be moving towards care for sicker patients. The PCP's role appears to be that of a “super generalist” ordering more tests to confirm diagnoses, managing diseases that were once the province of the Specialist, and referring fewer patients. Patient satisfaction with PCP care and reimbursement policies for Specialists will also play a role in the changing provider collaboration paradigm.

Not long ago there was considerable dialogue on the dismal future of the PCP profession. That is no longer the case. The shortage of PCPs will be addressed as a piece of the overall healthcare reform movement, and the changing dynamics in the interface between the Generalist and the Specialist will have an impact on us all.



The Willow Way ---

The Willow Group is a global qualitative and quantitative Market Research agency that has been providing enhanced insight to the healthcare industry for over 15 years. We call our success The Willow Way of doing things.

“It's not as much about the process, or the products... those are means to the desirable ends”

The Willow Group searches for the answers to your business questions



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"Quality, at the top of our minds and the foundation of everything we do."

Uwe Hohgrawe, Senior Vice President of The Willow Group had the opportunity to interview Matthew J. Carpenter, PRC, Executive Director Business Management for Bapineuzumab and the Alzheimer Disease Franchise at Wyeth Pharmaceuticals. Matt began his career at Wyeth in 2002, taking his most recent position in April 2009 as the Alzheimer's Franchise Business Manager. Matt is responsible for driving launch plans and commercial strategies for bapineuzumab globally, and building on Wyeth's partnership with Élan. Matt's responsibilities include the global commercial development and implementation of core strategic and operational initiatives, such as: benefit/risk management, labeling and core claims development, manufacturing/supply, patient infrastructure development, corporate communications, and forecasting.

For the past 3 years, Matt held the leadership position as Executive Director, Customer & Competitor Insights at Wyeth, heading up Primary Market Research with HCPs, Consumers and the Competitive Intelligence function.

This interview reflects Matt's personal opinions about his role at Wyeth, the pharmaceutical industry and market research.

TWG: Matt, thank you for sitting down with us today. Please tell us a little about Wyeth Pharmaceuticals.

Matt Carpenter: Wyeth Pharmaceuticals is organized around three business units - Biopharma, Vaccines, and Pharma. The Alzheimer's franchise, my new area of responsibility, has been a key area of development for Wyeth.

There are currently 10 products in development at Wyeth within the Alzheimer Disease area, covering multiple delivery platforms - Antibodies, Vaccines and Small Molecules. Wyeth is pursuing therapy that is both for disease modification and symptomatic treatment of Alzheimer's. It would be a major breakthrough for patients with this disease, their families, and the industry if Wyeth were able to develop a drug that alters the progression of Alzheimer's disease.

TWG: Matt, how do you view the recent consolidations within the industry?

Matt Carpenter: In my personal opinion, industry changes over the past few years has impacted both the client and vendor side, whether it be a result of the economic times, mergers, cost cutting, or off-shoring; all of it has a human impact that makes it even more challenging...*However, as I have seen throughout my career, change brings opportunity, opens doors never before considered and forces one to be a bit more introspective about their careers and world around them.*

Some of the benefits to creating larger companies are the concentration of resources it brings to bear on more difficult disease targets. This is something that should benefit society as a whole, whether it is a patient or any other stakeholder.

TWG: And thinking about the Market Research Profession as a consequence of industry changes or consolidation?

Matt Carpenter: With the overall economic situation, consolidations, and the general state of the industry - there is a greater emphasis on cost and value.

Today's market researcher must spend more time than ever "selling" the value of research internally before they even start conducting the research.

This environment, however, also *offers a great opportunity for MR to shine...* who better can look at the needs of the market, customer, or organization to help leverage opportunities or reduce potential risk – no one, except the market research and business analysis function. *The Market Researcher today needs to create an impetus for action, driving decision making and providing value.* In this environment you simply can't be a "data secretary!"

TWG: President Obama has indicated that healthcare reform will be a major part of his administration's agenda. How do you think this will affect the healthcare industry?

Matt Carpenter: It remains to be seen what effect this will have, but here are a couple thoughts:

1. I expect that we'll have to deal with the reality of "biosimilars" for biologics in a way we never had to before. This will potentially make this area more competitive than it has been traditionally, because it has been much more difficult for companies to break into this area from a development standpoint.
2. I'm also certain that the role of Payers and Consumers will become more and more important. For the industry and market researchers, the question is then: *how are we reaching that consumer given the rules and regulations, or proposed regulations, that are placed on pharma DTC advertising, and how do we integrate all of the stakeholders views (HCP-Consumer-Payer) to form an appropriate 360-degree view of the market to form real, relevant, and actionable insight.*

TWG: What is the effect of the evolving regulations on Market Research?

Matt Carpenter: If you follow the "rules" and right practices set by CASRO, ESOMAR and others, you can essentially run research where- and whenever it is required. However, what we find more and more is the impact of internal legal

Florence Nightingale - a "prophetess" of Market Research

Florence Nightingale (1820-1910) is known to nearly everyone as a pioneer of nursing and because of her huge influence on healthcare reforms. Most of us are unfamiliar however with her use of new techniques of statistical analysis, such as through the Crimean War when she plotted the incidence of avoidable deaths in the military. With this and other analysis, she revolutionized the thought that social phenomena could be objectively measured and subjected to mathematical analysis. In 1858 Florence Nightingale was elected as a fellow of the Royal Statistical Society; in 1874 the American Statistical Association elected her an honorary member. Karl Pearson, who established the discipline of mathematical statistics, acknowledged Florence Nightingale as a "prophetess" in the development of applied statistics.

reviews, and the interest to understand what and how we are running research. These reviews are all intended to avoid putting the company at risk – and that is great! But it also adds time to the research plan that the Market Researcher needs to take into account. It is also important to be aware of country or state reporting requirements to build these into the research timelines as well. It's not about not being able to do research; it's about doing it right - in compliance with local requirements.

TWG: How would you describe the biggest information needs in the Alzheimer market?

Matt Carpenter: Alzheimer Disease is becoming one of the biggest areas of research; there is truly an unmet need, and at the same time a general lack of understanding of what is of most importance from medical, care giver, payer and patient perspectives. This represents a huge opportunity for Market Researchers to glean this insight and provide it to companies and organizations that aim to best serve these key stakeholder groups.

TWG: Matt, let me conclude this interview by asking you if you have a motto that you live by, in your business and personal life?

Matt Carpenter: First of all, *'whatever you are working on, do the best you can, strive for doing the right thing and focus on delivering results.'* People tend to think about the next job, the next career level – I'm saying: *'Do a great job today, strive to do the right thing, and you'll be recognized tomorrow!'* And lastly—with all the changes and uncertainties out there – go back to the Golden Rule: *'treat everybody the way you like to be treated.'* We are all colleagues in many ways, regardless of being a vendor, supplier, consultant, or client – tomorrow that vendor may be a

customer or your boss. Don't get hung up on who you are, or what position you hold, focus on driving results by seeking excellence and doing the right thing.

TWG: Matt, we wish you a lot of success in your new role and thank you for this interview.

Meet Patti



Patti Zazas, Project Supervisor has been managing client

projects for over six years at The Willow Group. From initial proposal development through final report delivery (and all details in between) Patti takes pride in providing our clients with quality deliverables.

Patti recently married James Zazas and now has four children, Austin, Preston, CJ, and Maddie.



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Thanks to everyone who stopped by our exhibit at the recent PBIRG AGM in Phoenix. At this year's meeting we held a drawing for a "Willow Way" compass and Weibing Sheng, Senior Manager Market Research of The Medicines Company was the winner. **Congratulations Weibing!**

The PBIRG 2009 AGM was well organized, well attended, and offered a wide range of interesting and relevant educational courses and networking opportunities. The meeting theme was "Innovation" and guest speaker/futurist Dr. James Canton spoke of innovation as

a key driver of competitive advantage and approaches to decreasing the largest barrier to innovation - limited worldviews. Additionally he provided insights into pharmaceutical trends and outcomes we can expect in the future. Closing the meeting was Charlotte Sibley, Senior Vice President, Business Management of Shire Pharmaceuticals who shared her wisdom, experience on career enhancement, and some fundamental truths about Market Research. These were best practices in the past, and will guide our profession in the future: *trust and the search for the answers to the 'right' business questions.*

Thank you for taking time to read, "The Willow Way". If you have comments or feedback we would like to hear from you.

Write to bfergus@willowgroup.com

