

# The Willow Way

*“We will restore science to its rightful place, and wield technology’s wonders to raise healthcare’s quality and lower its cost.”*

President Obama  
Inauguration Speech January 20, 2009

The healthcare system in the United States is undergoing unprecedented change with more to come, and the changes will affect all of us. At a time of increasing pressures to make the right decisions, market research is even more important to successfully guide your business growth. From molecule through commercialization, market research brings insight and support you can and must count on.

**Welcome to our new newsletter!** We have designed it to be a quick read, informative, and focused on you, healthcare marketers facing increased pressure to make critical decisions fast. We are especially pleased that *Dennis P. Kane, Vice President Global Sales and Marketing, Phadia AB* took time out of his busy schedule and agreed to an interview. We discussed the changing healthcare environment, Phadia’s flagship product ImmunoCAP®, and the importance of market research in his decision making processes.

Please take a moment to read through the newsletter and turn to us the next time you need information to reduce the risk in critical decision making.



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.

*“The Willow Way”* centers on delivering quality value-added market research. It starts with a clear understanding of the business question to design a research plan to accomplish and exceed expectations.

Our clients use our services because:

- TWG is...** a refreshing, forward-thinking analytics team
- That...** goes beyond systematic execution
- Because...** our entrepreneurial and experiential approach provides invaluable perspective and enhanced insight to the information discovered and uncovered
- So...** our expertise provides the clarity you need for your business decisions.

**Those of you who know us already are familiar with *“The Willow Way”*:**

**Here are some recent quotes from professionals that experienced *“The Willow Way”*:**

*“... the launch meeting went very well and everyone at the company is excited about the launch and the marketing support materials. During the launch meeting I specifically thanked The Willow Group for the excellent research that allowed us to really know what physicians felt about logo options, detail aid visuals, and copy among other things. Several senior executives expressed how valuable the contribution of The Willow Group was.”*

Vice President Marketing, US

*“Your guys have won us over - we are in a solid place with you.”*

Senior Director Global Marketing

*“Thank you again for the final report and for meeting our extreme timelines! We appreciate all the extra hours you had to put in. The results helped us gain a first-rate understanding of the markets and the major issues that our new compound may face. Hope to work with you again soon”*

Global Market Researcher

### Dennie P. Kane

Vice President Global Sales and Marketing,  
Phadia AB



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

Dennie took time out from his global travels to talk about Phadia, their flagship product ImmunoCAP, the changing healthcare system, and his market research interactions with *The Willow Group*.

**TWG:** Dennie, thank you for sitting down with us. Please tell us a little about Phadia.

**Dennie Kane:** Phadia develops, manufactures and markets blood test systems to support the clinical diagnosis of allergy, asthma and autoimmune diseases. In business over 35 years and based in Uppsala, Sweden, our flagship product is ImmunoCAP, which is marketed in over 70 countries.

ImmunoCAP is a specific IgE diagnostic tool to identify allergic disease. Since we launched and subsequently re-launched ImmunoCAP we developed a brand new template of a specialty diagnostic company educating Primary Care Physicians on the role that technology plays in their practice.

The focus on Primary Care Physicians was a new marketing approach for us and we needed some very high quality market research to implement this in the right way. Without any doubt: we would not be where we are today, enjoying double digit growth, without good solid direction that we got by and through the research from *Willow*.

**TWG:** Please tell us about your role in this Primary Care Physician initiative and your responsibilities as VP Global Sales & Marketing at Phadia.

**Dennie Kane:** When I joined the company my objective was clear: to grow the business, and it was primarily a specialist-based business at that time; the Primary Care focus at Phadia started in 2001.

Our first challenge was, "What is our message and how are we going to take

the message to Primary Care Physicians?" In the last 8 years we have been

very successful. We started with 9 representatives in pilot markets and this year we will have in excess of 155 full time sales representatives. In addition to the sales force we have a number of e-marketing initiatives focused on the Primary Care arena supporting that success.

The most recent objective that we have incorporated into our strategic growth plan is to export the success that we have had in the U.S. to targeted European countries and into one of our largest potential markets, Japan.

**TWG:** Speaking about this international marketing perspective: what are some of the significant differences between countries and what adjustments does Phadia make to succeed across the globe?

**Dennie Kane:** First, healthcare is paid for differently in the US than in most European countries and Japan; that needs to be taken into consideration. In the US we have *thousands of payers* with *thousands of products*; in Japan and each country in Europe, there is essentially *one payer* – we understand that and act accordingly!

Second, the Primary Care Physicians in our markets around the world behave pretty much in a similar fashion: the same presumptive diagnosis and empiric treatment depending on how the reimbursement system works! If we are talking about educating them to be better diagnosticians and better managers of patient diseases we still need to educate them in a manner consistent with their culture to be the best physicians they can be.

**TWG:** What would you say are some of the top challenges that Phadia faces in this new marketing approach?

**Dennie Kane:** The biggest challenge that we have is *changing the Primary Care Physician's current diagnostic paradigm.*

PCPs are still using history and physical exam as their primary tools in the diagnosis of allergic rhinitis, the same in asthma. When asked, PCPs tell us that they don't manage allergies. However, when we change the discussion and talk about specific diseases that they do manage like eczema, rhinitis, and asthma – diseases with a frequent underlying allergic cause - they are very comfortable with their current paradigm in that they make a presumptive diagnosis and use empiric treatment.

PCPs diagnose *allergic* rhinitis greater than 90% of the time, however the literature shows that there is about a fifty/fifty split between allergic rhinitis and non-allergic rhinitis. We need them to understand that there are many more non-allergic rhinitis patients and that much more of the asthma is allergic than they think. Those factors need to be included in the management plan of their patients.

That opens up a real challenge and an opportunity to the behavioral change stream that we need to address. ImmunoCAP diagnostic testing provides the specific evidence-based information

PCPs need to manage the disease at its source.

This brings me to the *relationship between the allergist specialist and the PCP generalist* and why this presents an additional opportunity.

At a time when healthcare resources in the US are 17% of GDP and projected to possibly climb to 25% of GDP we don't need to be saying that more patients need to go to the specialist, we need to be driving technology down to the Primary Care Physician level so it is much more accessible to help manage patients. What we are seeing is that as technology comes into the marketplace faster and faster, PCPs need to be educated about the advantages that the technology presents which will allow them to more selectively refer patients to specialists.

**TWG:** President Obama has indicated that healthcare reform will be a major part of his administration's agenda. How will this affect Phadia's outlook?

**Dennie Kane:** I applaud President Obama's initiative on the need for healthcare reform!

In the mid-90's healthcare reform focused on Disease Management. The Disease Management approach was the right idea with the wrong execution. It is absolutely imperative that we get better outcomes and this requires a solid differential diagnosis. And, the technology that I am

referring to – technology that Phadia is developing - helps make an evidence-based diagnosis rather than a presumptive diagnosis.

As the diagnosis gets better, the treatment plan gets better. The more specific pharmaceutical agents available today can prevent a lot of hospitalizations and a lot of unnecessary costs if they are used on the right patient at the right time.

**TWG:** This question about improving the diagnosis brings us back to ImmunoCAP, a Phadia product that has experienced impressive growth year to year over the last five years. In a very challenging marketplace, how have you accomplished that?

**Dennie Kane:** Generally the foundation of our success is our ability to see our business in a different light than we did ten and even five years ago!

I go back to the age-old story of the railroad industry when the railroads suffered a massive decline because they thought they were in the railroad business when they were actually in the transportation business. That is similar to our 'world'! *Previously:* we were so technically oriented looking at IgE, looking at IgE components, and understanding at the molecular level what was driving the sensitization and how you related the IgE level and sensitization to a discussion of a patient's clinical presentation – and we were good talking



**Come by and visit The Willow Group  
at the PBIRG meeting  
in Phoenix, AZ (May 17th-20th 2009)**

We are pleased to announce that The Willow Group will be exhibiting at this year's PBIRG meeting in Phoenix, AZ. If you are planning to attend this meeting, please come and visit us at our booth – **we are looking forward to seeing you there!**

This may be your first step on **"The Willow Way"** – and the next step will be to work together with our experienced team that will design and implement a research plan that will **search for the answers to your business problems** to not only meet, but **exceed** your expectations.

### The Willow Group now in Barrington, IL and Princeton, NJ

The Willow Group, Inc. founded in 1994 and headquartered in Barrington, IL is delighted to announce the opening of its new office in Princeton, NJ. The location on Rt. 1 in Forrestal Village, presents our East Coast Clients with direct access to Market Research Experts that offer our unique market research approach.

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## Feature Interview

### Dennis P. Kane cont.

Vice President Global Sales and Marketing, Phadia AB

about it. *Now:* I already talked about how we changed our approach to the Primary Care Physician – in addition we put it in terms of patients who this group of physicians sees every day:

- He does not see allergy patients, he sees patients with eczema, little kids with skin disorders, a teenager with a runny nose, and he sees patients with shortness of breath.
- He is not thinking about the IgE mediated pathway of the disease.
- He wants to make the patient better - now!

The thoughtful approach of *The Willow Group* helped us a great deal here. Our paradigm shift and that change in thinking is the cornerstone of what has propelled us over the last several years.

**TWG:** Phadia has always counted on market research to guide decisions, looking forward, what types of information do you foresee as essential in the next 12-24 months?

**Dennie Kane:** Our knowledge of the market was very limited and we worked with *The Willow Group* to understand the market and to identify what the hot buttons are in Primary Care. We have moved great strides in understanding the nuances; our messages have changed subtly to be much more in line with current physician thinking.

Right now there is a huge consolidation in the Pharmaceutical Industry, the number of sales representatives is going

down significantly and the number of new chemical entities being discovered is fewer and fewer every year. So physicians don't have as many opportunities to get educated from a company perspective.

What *The Willow Group* has done and will continue to do nationally and internationally is to identify the right business questions and to support us finding channels of communication to Primary Care in educational venues so that we can both educate physicians on how this product can help them as well as how this product works.

**TWG:** Is there a motto that you live by, in your business and personal life?

**Dennie Kane:** One motto, and this is very important for anyone who is trying to help an organization change, "*None of us is as smart as all of us.*"

**TWG:** Is there any advice that you can give to not only survive, but to thrive in these economically stressful times?

**Dennie Kane:** That really comes out of the motto. The way that we continue to succeed is to constantly approach the challenge with an open mind and be prepared for constant change with a solid internal *and external team*. And, to know that you need to have a number of eyes on the topics at hand. Our teams work very closely together. We work hard at not allowing silos to be formed in our organization. We keep it very flat. Everyone has a chance to contribute and participate, and with that comes responsibility.

