



Kineticos Case Study

R&D Innovation Strategy



Innovation
Branding
Solution
Marketing
Analysis
Ideas
Success
Management

Solution

Kineticos was retained by a leading CRO to perform a rigorous analysis of the CRO industry via a primary research study and competitive assessment

Situation:

A global, leading CRO retained Kineticos to conduct a primary research study to evaluate where it stood in comparison to leading competitors in the CRO industry. They were interested in competitive intelligence, key customer buying factors, and well as the View of the Future.

Process:

Kineticos worked with the client to develop a primary research study designed to provide insights regarding top CROs and where the client ranked in key attributes overall and when compared to the other competitors. Additionally, the study was designed to generate a look at the View of the Future – current trends in the CRO market, and disruptive trends expected to emerge in the next 3-5 years.

After promptly achieving the target N value of the survey, Kineticos analyzed the data and provided strategic recommendations to the client.

Outcome:

The client leveraged the outputs of the primary research study during its annual strategic planning, identified areas of improvement in its current service offerings, and plans to invest in key areas of interest in the future.

Kineticos conducted the primary research study and then assessed the data by separate cohorts: including all respondents, Vice President and Above respondents, and additional cohorts

Executive Summary

Competitive Ranking – Vice President and Above Respondents

- REDACTED ranks 2nd out of 7 in segment of respondents who self selected with titles of Vice President and higher

Qualitative Customer Buying Factor	REDACTED	REDACTED	REDACTED	REDACTED	REDACTED	REDACTED	REDACTED
Overall Score	1st	5th	3rd	6th	4th	2nd	7th
On time project delivery	1st	5th	3rd	6th	4th	2nd	7th
History of successful project execution	1st	5th	3rd	6th	4th	2nd	7th
Pristine regulatory track record	1st	3rd	4th	6th	5th	2nd	7th
Proactive in identifying and resolving issues	1st	4th	3rd	5th	6th	2nd	7th
Specific therapeutic expertise that matches my project	5th	4th	1st	6th	3rd	2nd	7th
On budget project delivery	1st	5th	3rd	6th	4th	2nd	7th
Overall company reputation	1st	4th	2nd	6th	5th	3rd	7th
Speed of project initiation including site selection and activation	1st	6th	5th	3rd	4th	2nd	7th
Effective communication including project management and governance	5th	2nd	1st	4th	7th	6th	3rd
Competitive costing models	5th	1st	7th	2nd	3rd	6th	4th
Flexibility to adjust schedules, sites, protocols as required	1st	4th	7th	5th	2nd	3rd	6th
Practical risk mitigation approaches	4th	5th	6th	2nd	3rd	1st	7th
Efficient contract modification process	1st	2nd	4th	5th	3rd	6th	7th
Innovative approaches with new technology	1st	7th	2nd	6th	3rd	4th	5th
Global network of sites	1st	6th	2nd	4th	5th	3rd	7th

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Executive Summary

Competitive Ranking - Overall

- REDACTED, REDACTED, and REDACTED are perceived to be top tier CROs
- REDACTED ranked highest in each of the differentiated feature

Qualitative Customer Buying Factor	Importance of Buying Factor	REDACTED	REDACTED	REDACTED	REDACTED	REDACTED	REDACTED	REDACTED
Overall Score	N/A	1st	4th	2nd	5th	6th	3rd	7th
On time project delivery	1st	1st	2nd	3rd	5th	4th	6th	7th
History of successful project execution	2nd	1st	2nd	4th	5th	6th	3rd	7th
Pristine regulatory track record	3rd	1st	5th	3rd	4th	6th	2nd	7th
Proactive in identifying and resolving issues	4th	1st	4th	3rd	2nd	7th	6th	5th
On budget project delivery	5th	1st	3rd	7th	4th	6th	2nd	5th
Specific therapeutic expertise that matches my project	6th	1st	3rd	4th	5th	7th	2nd	6th
Overall company reputation	7th	2nd	1st	4th	6th	5th	3rd	7th
Speed of project initiation including site selection and activation	8th	1st	5th	3rd	4th	2nd	6th	7th
Effective communication including project management and governance	9th	1st	5th	2nd	4th	6th	3rd	7th
Competitive costing models	10th	5th	2nd	1st	7th	4th	6th	3rd
Flexibility to adjust schedules, sites, protocols as required	11th	1st	6th	2nd	4th	7th	5th	3rd
Practical risk mitigation approaches	12th	5th	1st	7th	4th	3rd	6th	2nd
Efficient contract modification process	13th	2nd	6th	1st	5th	4th	3rd	7th
Innovative approaches with new technology	14th	2nd	5th	1st	4th	6th	3rd	7th
Global network of sites	15th	1st	5th	2nd	4th	6th	3rd	7th



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Executive Summary

Top Competitors

- REDACTED is perceived to be strong for on time project delivery, history of successful project execution, and regulatory track record

- Perceived areas of weakness for REDACTED include flexibility to adjust schedules, sites, and protocols and competitive costing models

- REDACTED is perceived to be strong in flexibility to adjust schedules, sites, and protocols, efficient contract modification process, and innovative approaches with new technology

- Perceived areas of weakness for REDACTED include on budget project delivery and competitive costing models

- REDACTED is perceived to be strong in regulatory track record, specific therapeutic expertise that matches the project, and on budget delivery

- Perceived areas of weakness for REDACTED include on time project delivery, speed of project initiation, and proactivity in identifying and resolving issues



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Additionally, Kineticos evaluated the primary research study respondents by future purchasing patterns, by North America located companies, and large companies (>1,000 employee)

Executive Summary

Competitive Ranking - >1,000 Employee Companies

- REDACTED ranks 6th out of 7 in segment of respondents who work for companies with >1,000 employees

Qualitative Customer Buying Factor	REDACTED	REDACTED	REDACTED	REDACTED	REDACTED	REDACTED	REDACTED
Overall Score	1st	2nd	4th	5th	7th	6th	3rd
Overall company reputation	1st	3rd	4th	7th	6th	5th	2nd
History of pristine regulatory track record	1st	6th	2nd	3rd	7th	4th	5th
Specific therapeutic expertise that matches my project	2nd	1st	4th	6th	7th	3rd	5th
History of successful project execution	1st	2nd	4th	3rd			
Innovative approaches with new technology	3rd	4th	1st	6th			
Global network of sites	1st	3rd	2nd	4th			
Effective communication including project management and governance	6th	1st	7th	5th			
Speed of project initiation including site selection and activation	1st	2nd	6th	4th			
Flexibility to adjust schedules, sites, protocols as required	7th	5th	2nd	4th			
Competitive costing models	5th	2nd	7th	4th			
On budget project delivery	2nd	5th	7th	6th			
Efficient contract modification process	3rd	2nd	1st	7th			
Proactive identification and resolving of issues	3rd	5th	4th	2nd			
Practical risk mitigation approaches	1st	3rd	5th	2nd			
On time project delivery	2nd	4th	6th	3rd			

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Executive Summary

Competitive Ranking – North America Located Companies

- REDACTED ranks 2nd out of 7 in segment of respondents who work for companies located in North America

Qualitative Customer Buying Factor	REDACTED	REDACTED	REDACTED	REDACTED	REDACTED	REDACTED	REDACTED
Overall Score	1st	7th	3rd	4th	5th	2nd	6th
On time project delivery	1st	7th	4th	3rd	5th	2nd	6th
History of successful project execution	1st	7th	4th	5th	3rd	2nd	6th
Pristine regulatory track record	1st	6th	3rd	4th	5th	2nd	7th
Proactive in identifying and resolving issues	1st	7th	3rd	4th	5th	2nd	6th
On budget project delivery	2nd	6th	5th	1st	4th	3rd	7th
Specific therapeutic expertise that matches my project	1st	7th	5th	2nd	4th	3rd	6th
Overall company reputation	2nd	7th	1st	4th	6th	3rd	5th
Effective communication including project management and governance	1st	7th	3rd	4th	5th	6th	2nd
Speed of project initiation including site selection and activation	6th	2nd	3rd	1st	7th	5th	4th
Flexibility to adjust schedules, sites, protocols as required	5th	2nd	1st	7th	3rd	6th	4th
Practical risk mitigation approaches	1st	3rd	4th	7th	5th	2nd	6th
Competitive costing models	4th	7th	5th	3rd	6th	2nd	1st
Efficient contract modification process	1st	2nd	4th	5th	3rd	6th	7th
Innovative approaches with new technology	1st	2nd	6th	3rd	5th	4th	7th
Global network of sites	1st	2nd	6th	3rd	5th	4th	7th

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Executive Summary

Future Purchasing Patterns

- 28% of respondents indicated that they are “Likely” or “Extremely Likely” to purchase from REDACTED in the next 6-12 months
- 37% of respondents indicated that they are “Likely” or “Extremely Likely” to purchase from REDACTED in the next 6-12 months
- 24% of respondents indicated that they are “Likely” or “Extremely Likely” to purchase from REDACTED in the next 6-12 months
- On average, clients indicate they intend to outsource somewhat more to REDACTED in the next 6-12 months (~5% more)
- On average, clients indicate they intend to outsource slightly more to REDACTED in the next 6-12 months (~4% more)
- On average, clients indicate they intend to outsource somewhat more to REDACTED in the next 6-12 months (~7% more)

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