

Many Vendors or One Partner?

How Trust in an Insights Firm Led to Launch Success

For one small pharma company, a deepening relationship with a market research firm led too a blockbuster drug launch against enormous competition



The Challenge: “Goliath to Our David”

In 2019, Biohaven Pharmaceuticals had a problem.

The New Haven startup was in phase 3 development of a potentially game-changing migraine medication, one of a new class of drugs called gepants. The team at Biohaven had strong data showing that one dose of their drug,

rimegepant, reduced pain from migraine safely and effectively, in as early as 1 hour.

The problem? AbbVie. The pharma powerhouse behind Humira, at the time the top-selling drug in the world, had gotten into the migraine business by buying Allergan, the company which had developed ubrogepant. This drug, soon to be marketed as Ubrelvy, was scheduled to get FDA

approval and enter the market a few months ahead of Biohaven's rimegepant.

Adrienne Ross, Biohaven's Senior Vice President, Commercial Portfolio Strategy, joined Biohaven early on. "When we saw the very first market research, there was always an edge [to rimegepant], so what I said was, 'OK, what if you were [AbbVie] and you saw this same data?' That actually told us they were going to spend and spend big. They were going to be Goliath to our David."

On top of that, Biohaven, at that time primarily a development organization with a very small commercial strategy team, was trying to enter a market crowded with inexpensive generic options. There had been very little innovation in migraine treatment for many years. Doctors and patients had come to accept that the side effects of migraine treatments were often as debilitating as the headache itself.

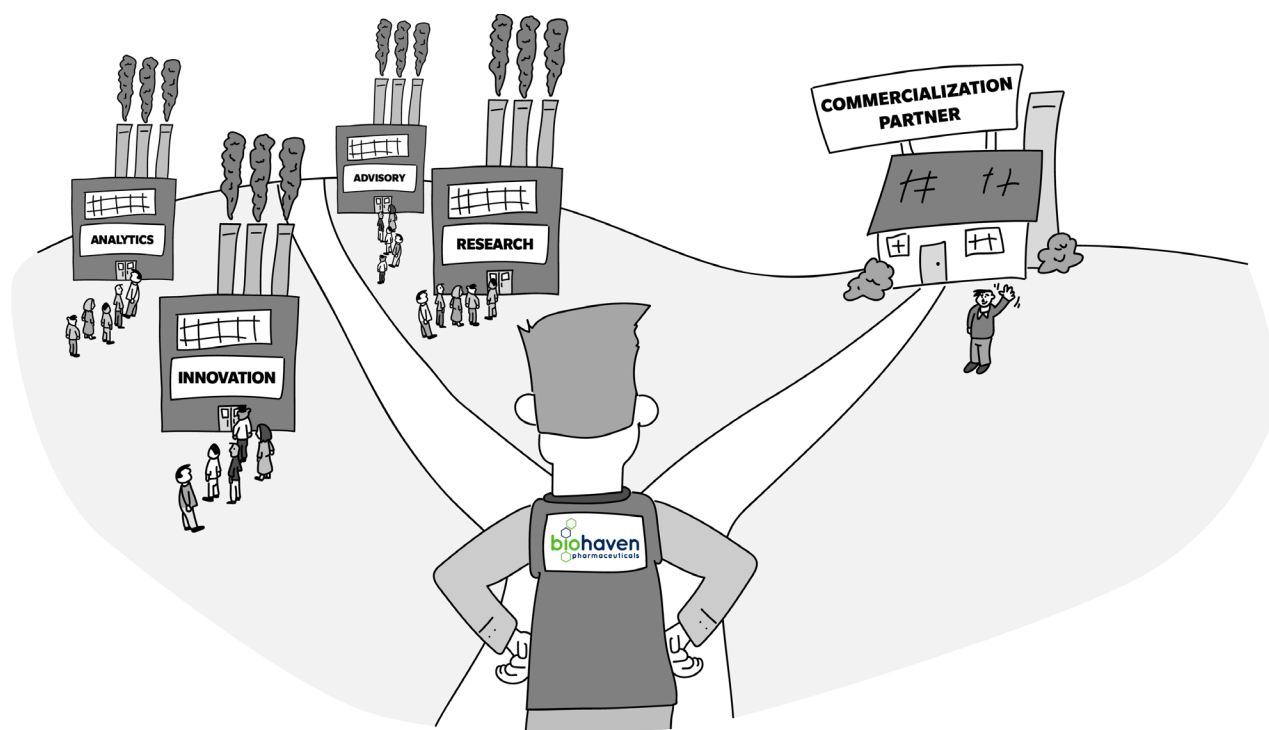
This complacent market was ripe for disruption. AbbVie had the resources to do it. Biohaven

CEO Vlad Coric could plainly see that if Biohaven couldn't outspend AbbVie, they'd have to outmaneuver them.

The Biohaven team, led by Chief Commercial Officer B.J. Jones and Brand Marketing SVP Graham Goodrich, needed answers to a range of questions: What were the dissatisfactions with conventional treatment? What did patients want from treatments? What did doctors want? Were there contradictions between the two?

At the time, Biohaven's market research department consisted of one freelancer. "She had incredible strength at pulling insights from interviews," Ross remembers. "But she was not looking for full-time work, nor did she have any infrastructure behind her."

Biohaven needed superior insights. Those insights would have to be developed into the most effective strategy possible. There could be no room for error in the execution of that strategy.



The Choice: Multiple experts or one committed partner?

It became apparent Biohaven was at a fork in the road. On one side: work with a variety of vendors—professional market researchers, launch specialists, and more, hoping each would give their all to a small company with an interesting drug and a huge competitive disadvantage.

On the other side: find one vendor who would be just as devoted to the launch as they were. “It was a bit like trying to build an orchestra from scratch,” Graham Goodrich remembers. “Did we go out and look for the best flautist, the best violinist, the top musicians in every category and hire them without knowing how well they would play together? Or did we need a group that understood the music we were trying to make, that felt the same way about it as we did?”

Biohaven was looking for a true commercialization partner. Biotech Value Advisors, a strategic commercialization agency that was advising Biohaven’s CEO on commercial options and launch requirements, introduced Biohaven to a market research firm called Magnolia Innovation.

Magnolia Innovation partner Diego Rodriguez had worked in market research for several years before he started Magnolia with a colleague in 2013. “We wanted to do work that really mattered to clients and patients,” he remembers, “and grow it with the most talented folks we could find.” By 2019, they had 35 employees.

Rodriguez sees different companies offering different flavors of market research. “Some companies are very focused on delivering projects, and do so very well, and very efficiently,” he explains. “But they’re not necessarily experts at interpreting ‘what does it mean?’ They’re not in the consulting space where they connect that one piece of work to the next and the next and then give [the client] that full perspective.”

Magnolia’s approach leveraged this insights-based consulting, driven by market research, focusing on

small- to medium-sized biotech companies. “Those companies really do want the advice,” Rodriguez has found. “They want the partnership that a group like ours can provide.”

From the start, something between Magnolia and Biohaven clicked. Goodrich explains, “When you’re a small company, every employee has a vested interest. It really feels like a family—and the truth is, nobody is going to take care of your family the way you are, to see the whole picture and not just this or that tiny piece. Because all those pieces have to connect, and that kind of connectivity is what we were looking for.”

“With Magnolia,” he goes on, “it was never ‘Here’s your research report.’ We knew every member of the Magnolia team saw the big picture. They became our de facto partner.” Magnolia immersed itself in the product and the market, doing everything in their power to become experts in the space. By demonstrating over and over that they were as invested in the launch as Biohaven, Magnolia proved to be a true commercialization partner.

The Benefits of Partnership: Research, Insights, and Speed

The biggest challenge was time—Magnolia signed on in 2019; Biohaven was on track to launch rimegepant, now called Nurtec ODT, in 2020. AbbVie’s entry, Ubrovelvy, was scheduled to launch first. Together, Biohaven and Magnolia began searching for the data points that would show the way to a successful launch strategy for Nurtec ODT. One early realization: HCPs thought their patients with migraine were more satisfied with their treatments than they actually were.

Ross tells the story: “I’ll never forget physician interviews we did in Chicago—one physician felt the population of patients who didn’t tolerate triptans was akin to an orphan disease,” which, if true, would have profoundly limited Biohaven’s growth. “The next physician who came in said that these patients were a huge market.” Differing views like this made clear which perceptions needed to

be countered, and which needed amplification, through strategic messaging.

One of the key differentiators for Nurtec ODT: clinical trials confirmed that it was a one-and-done drug—after taking one dose, many people with migraine felt relief within 1 hour.

But research by Magnolia showed physicians were skeptical about the whole idea of a single-dose drug. Because of the inconsistent efficacy of drugs on the market, first doses were often not enough to stop migraine pain. When physicians wrote prescriptions for migraine patients, they regarded the ability to take a second dose as an important pharmacological differentiator.

“We knew single dose was part of our value proposition,” Ross remembers, but doctors with prescription pads didn’t see it as a value. “And we had this data point of 86% of patients [in clinical trials] did not take rescue medication. What Magnolia did was say: If you take the idea of single dose as a feature, not a bug, and the payoff is 86% of patients didn’t need anything else but Nurtec ODT, then you move the ability to double-dose down in priority.”

Ross credits Magnolia with seeing the connection others might not have. “Many people would have said, well, the clinical data showed 86%, but did it tie to the single dose?” Magnolia made the leap from writing prescriptions that included second dosing to not needing rescue medication, and once Biohaven built that into its messaging, physicians made the leap as well.

Ross remembers some felt it “wasn’t a good idea to put all your research eggs in one basket.” They suggested different vendors and methodologies. “What we got back wasn’t different than what we knew from Magnolia—and in fact didn’t tie the insights together across studies. That was a major Magnolia difference, the ability to cross verify information across data points.”

Launch and Results: Competitive Advantage From an Unlikely Source



One competitive advantage of the close relationship between Biohaven and Magnolia: increased efficiencies. In mid-2019, Biohaven still hadn’t hired anyone to lead their Insights & Analytics department. After months of working with Magnolia, they made an unusual choice, and asked Diego to act as Biohaven’s Insights & Analytics lead. Diego led I&A, attending leadership meetings for several months before Biohaven found and hired someone to fill that role.

In fact, Magnolia and Biohaven became so in tune that, in the heat of the launch, Biohaven tasked Magnolia with explaining strategy to new Biohaven employees during onboarding.

Magnolia also saw it wasn’t just employees who needed onboarding. Magnolia’s primary research suggested a real need to get patients involved in seeing there might be more to therapy. This led Biohaven and Katalyst, Biohaven’s creative agency, to envision an unbranded, prelaunch market-

shaping initiative, the Demand More campaign, empowering patients to demand more from their migraine treatment. Its dual purpose: to give shape to an unmet need and to set the table for a branded direct-to-consumer campaign.

Magnolia and Biohaven recognized that, if this market was to be disrupted, it had to happen fast. Customarily, pharma companies wait for FDA approval before developing and testing their DTC campaigns, as making that kind of time and financial investment prior to FDA approval can be a huge risk. Pharma companies typically launch a DTC campaign 6 to 12 months after approval. Biohaven's marketing team was able to launch Nurtec ODT's DTC—including TV spots—within 6 weeks of their first indication, for the acute treatment of migraine attacks, and within 1 week for their second indication, for migraine prevention. As Goodrich notes, "The trust and confidence that Biohaven had in Magnolia's research and insights set the stage for creative risk-taking—in terms of timing, and also in terms of pushing the envelope on ideas."

That mix of flexibility, speed, and quality was evident to Ross. Working with Magnolia, "When you ask a question, they literally know where it is in the backup that provides the context, and if they don't, let me tell you, within 24 hours you get it."

All that intensive work helped inform vibrant, compelling campaigns created by Biohaven's agency partners. With the support of Katalyst, Biohaven was able to turn around prelaunch and postlaunch DTC tactics in record time. The medical education agency, Synapse, built the absolutely crucial professional awareness and education campaigns, and Sam Brown, Biohaven's PR firm, managed a constellation of efforts, ultimately bringing celebrities such as Khloé Kardashian and Tori Spelling into the Biohaven fold.

For Lauren Murphy, Biohaven's director of consumer marketing, the benefits of this close working relationship are ongoing. "Because Biohaven and Magnolia are in lock step, when our leadership makes a quick decision, we can

go to Magnolia for a gut check and they activate immediately. Agility has been a critical success factor for Biohaven, and Magnolia has been able to support us with such speed because they know us well."

Chief Commercial Officer B.J. Jones concurs. "The work Magnolia has done has informed how our field force approaches our customers," he notes, "and how our consumer marketing approaches our patients. That has helped drive us to market leadership when our commercial organization did not exist until 2019."

The launch was, by any measure, highly successful. Within 5 months of launch, Nurtec ODT surpassed Ubrovelvy to become the market leader in new-to-brand prescriptions—this despite launching in March 2020, months after its competitor and at the very start of the COVID-19 pandemic. Since then, more than 2 million prescriptions have been written for Nurtec ODT.

Magnolia played—and continues to play—an important role in making Biohaven a market leader in the migraine space. Today, Biohaven maintains strong relationships with all their vendors. Biohaven—and its migraine franchise—was purchased by Pfizer in 2022, and Magnolia has grown to 70 employees. But even with all that change, the partnership that evolved between Biohaven and Magnolia has only gotten stronger and continues to inform and affirm Biohaven's strategic decisions. For Rodriguez, "This is how we like to operate. It's not the norm, perhaps, but companies that choose it often fare better than companies that don't."

Speaking for Biohaven, Goodrich agrees. "No one at Biohaven considers Magnolia a vendor. They are our partner in commercialization." He smiles. "I suspect our competitors have a lot of research and strategy vendors. We don't. And I'd say that's been a clear competitive advantage."

Magnolia Innovation is a pharmaceutical market research firm that believes in following the science where the evidence leads and is unafraid of new and unorthodox ideas. We are grateful to Dr Slavich for sharing his research and observations on the links between stress, inflammation, and chronic disease.

For more information on these and many other new developments on the frontiers of healthcare, pharmacology, and related areas, please contact Magnolia Innovation, or visit magnoliainnovation.com.

