

Portfolio and Brand Strategy

Capabilities Overview

November 2022

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Discover more here: [Example white paper: Portfolio co-positioning](#)



Portfolio and Brand Strategy

Realizing the potential of your brand

Strategic portfolio and brand planning requires expert navigation across multiple information sources, fast evolving markets, changing stakeholders and the internal cross-functional environment.

We partner with you and your teams to provide innovative thinking, experienced resource and planning ‘know-how’ to deliver clear, robust strategy that differentiates your brand in the minds and experiences of your customers.

Why Lumanity?

- Best-in-class strategic techniques and principles that ensure a traceable connection, or Red Thread, from Ambition through Insight to Strategy and Tactics
- Our critical thinking framework and expert teams ensure confident strategic choices - delivering a robust, implementable plan, endorsed by your critical stakeholders

Our Red Thread Planning™ philosophy is founded on best practice strategic principles – ensuring your plan hardwires environmental changes and customer insights into your strategy and tactical plans.



We can help you

Develop your winning portfolio or brand strategy



We partner with your cross-functional team to build your strategy, provide fresh insights, challenge thinking and validate ideas – behind the scenes and through innovative and interactive workshops.

Audit and pressure test your existing plans



We can work with your core team to assess and pressure test current plans – delivering clear and pragmatic recommendations.



Transform your planning framework and process

We have a wealth of experience in developing new core strategic planning frameworks for organizations and brands – embedding best-in-class process and thinking.

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Example Case Study

Execution of global brand planning process across multiple brands, indications and stakeholder groups

Hematology

The Client

A US-based pharmaceutical company focused on developing and manufacturing therapies for the treatment of hematological, respiratory and neurological disorders

The Business Challenge

A need to orchestrate a uniform and streamlined brand planning approach across the client's hematology portfolio – with the desire to identify cross-brand “big tactical ideas” to support portfolio growth

Our Approach

- Organized dedicated Lumanity sub-teams for each therapy area - ensuring brand teams had a consistent point of contact throughout the planning process
- Distilled latest therapy area insights and market developments to highlight key issues individual brand strategies had to address
- Developed a streamlined planning process to minimize “meeting overload” for brand team stakeholders; leveraging virtual workshops and digital platforms to facilitate collaboration and capture of key insights
- Upon plan finalization, key areas of overlap and opportunity between brands were identified – allowing for identification of cross-brand, portfolio-level activities to drive strategy toward common HCPs and allow for investment efficiencies

Outcome

- Coordination and execution of an aligned planning process involving a large number of stakeholders, across a minimal number of meetings
- Development of a set of robust, cross-functional brand plans – in turn supporting the identification of portfolio-level “big tactical ideas”



“Special thanks to the entire Lumanity team for coordination and facilitation as it wouldn't have been possible to have such a productive and engaging ‘Hematology Brand Month’ without them”

Head of Global Marketing, Hematology