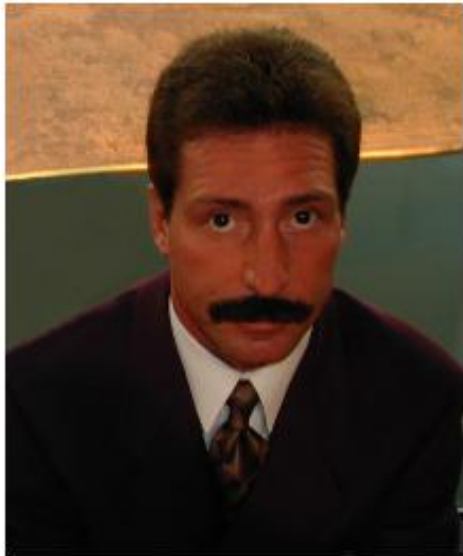


PRODUCTS AND CLIENT SERVICES

Market Modeling | Strategy & Bus. Dev | Benchmarking | Mkt. Research | Bus Services



To the decision maker, knowledge is power.

We've built our reputation by providing actionable decision making tools for today's business environment.

We are keenly aware of the challenges facing M&A, R&D, Product Management and Customer/Field Service.

We know the variables that make decision making and planning difficult in this industry.

Better information for better decision making; that's our business.

Robert Bauer
President

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ARTICLES, INTERVIEWS, QUOTATIONS

Articles and Publications

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We are learning all the time.

In the last 10 years we have worked carefully with university and cross-industry collaborations to develop the modeling tools and proprietary methods for which we are best known. As good as they are, the one thing I have come to appreciate is that industry experience is critical to making them truly useful. You must understand the nuances of the business. This is the key to distinguishing our work.

Nils Effertz
Analyst

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CONSULTING TEAM

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We "live" globalization everyday with the cultural and language challenges of each study, searching for the global similarities and characterizing the importance of regional differences.

CaseBauer operates in 14 countries and has native fluency in 8 languages. I've lived and worked in 4 of the countries and speak three languages.

Globalization is more than just a concept in this office. We live it everyday.

Bernat Bsonik
Analyst

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INDUSTRY LINKS

Manufacturers | Associations and Government Agencies | Publications



There's a world of experience out there.

Our clients include 72 diagnostic manufacturers, 8 pharmaceutical companies, 3 imaging companies, 6 distributors, 14 laboratories, 16 venture start-ups, 2 GPOs, and 4 Professional Societies.

This is a complex industry with over 1,000 clinical applications, multiplied by a broad range of technologies and multiple trade channels. We believe in studying case histories. Understanding the experience of others is an invaluable starting point for creating new and innovative solutions.

Larry Worden
Senior Consultant

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MARKET MODELING

OVERVIEW

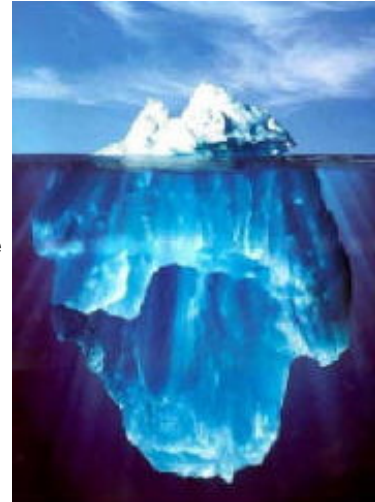
CaseBauer operates in five functional areas: Market Modeling, Strategy / Business Development, Benchmarking, Market Research and Business Services.

Our Market Modeling practice pioneered market simulation models for the IVD and Devices industry. CaseBauer Market Simulation Models are effective tools for predicting market reaction to new products, portfolio changes, pricing changes, service changes, and competitive changes. These models are effective in measuring effects across geographic markets (e.g, US, France, Germany, etc.).

Examples of recent models includes:

- predicting the adoption curve of a new product;
- predicting the comparative value of two alternate product designs / investments considering market penetration, R&D and manufacturing costs, time to market, and risk;
- modeling the effect of competitive action and simulating alternate counter actions;
- constructing a price elasticity sensitivity/elasticity curve and determining price (profit) optimization points; and
- product design ranking and valuing product features and R&D investment on a net present value basis.

CaseBauer's statistical methods are based on proprietary methods developed in collaborations with Emory University (Atlanta, GA) and The University of Texas (Arlington, TX). Simulators are fueled by site data collected from customer locations and supplemented with information from your financial systems, and our industry database. A typical analyses is based on 15,000 to 50,000 simulations.



STRATEGY & BUSINESS DEVELOPMENT

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CaseBauer operates in five functional areas: Market Modeling, Strategy / Business Development, Benchmarking, Market Research and Business Services.

Our Strategy/Business Development practice facilitates the development of commercialization strategies for new products and services, as well as strategies for the life cycle management of existing products and services.

This practice also supports the analysis of long and medium range business and technology opportunities such as R&D investments, licensing agreements, strategic partnerships, as well as divestitures, diversifications, acquisitions, and mergers.

This practice has a sound clinical/disease state orientation and experience with emerging technology and capital equipment/automation/ service, as well as point of care and prescription self testing.



Examples of Strategy/Business Development tools include:

- Market Analyses/Foundation Packages
- Multinational Political/Third Party Payer/Standard of Care Analysis
- Corporate Strategic Profiling
- Due Diligence
- Technology Valuations
- Industry Brief-Executive

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Market Analyses/Foundation Packages

"Foundation packages" are broad market investigations undertaken to characterize the market and business environment of a specific field. Foundation packages provide a topline working basis of an opportunity target. The target can be a technology (e.g.; molecular diagnostics), product area (e.g.; Disposable Pregnancy test), or market (e.g.; Japanese Fecal Occult Blood Screening). Foundation packages are used for decision making. Foundation packages are also used to provide perspective upon which to focus and prioritize more detailed and comprehensive analysis.

Depending on the target, a foundation package can define, segment, size the target, provide information on the history and evolution, the basis of competition, profit and pricing practices, profile the major manufacturers and products in the field, and examine the critical factors of success.



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Multinational Political/Third Party Payer Analysis

Increasing scrutiny of technical medicine expenditures (e.g.; pharma, IVD, imaging) will continue as healthcare payers struggle to deal with:

- healthcare budgets (national/regional) that are exceeding the tax base and insurance premium base collected for healthcare services;
- healthcare benefit overheads that are reducing the industrial competitiveness of the G-7 nations in an increasingly competitive world market;
- population demographics that are shifting such that the consuming segment of the population (the elderly) is growing, and the contributing segment of the population (the working class) is decreasing; and
- growth in the per capita costs for healthcare procedures growing faster than inflation.

A Multinational Political/Third Party Payer Analysis examines the medium and long range implications of current or emerging initiatives (e.g.; "Clinton Healthcare" in the US, "Plan Juppe in France," and "USL/Privatization in Italy) on a product or service. These analysis will examine how payers will analyze, value, rank/prioritize your new product/service. These analyses will also examine alternate pathways and the critical factors to becoming a "standard of care".

STRATEGY & BUSINESS DEVELOPMENT

Corporate Strategic Profiling

A Corporate Strategic Profile is an externally generated prospectus on a company or division for the purpose of assessing the strength/veracity of the organization, its core competencies and tendencies.

Corporate strategic profiles are useful for a broad range of purposes such as:

- preliminary assessment of acquisitions candidates, or acquirers;
- preliminary assessment of strategic partners for product, service, sales, technology collaborations;
- pre-negotiation briefs; and
- assessing likely competitive responses to your intended actions.

A typical corporate profile includes:

- history and background of the company;
- operating performance to include profit and loss statement detailing sales, manufacturing costs, margins, R&D expenditures, sales/marketing , service, SGA, income(before taxes);
- organizational structure to include an outline of the management, business unit, and sales/service structure;
- product portfolio to include product mix, market shares, competitive position;
- Research and development to include pipeline, core competencies and limitations; equities, licensing and partnerships; and future outlook.

Note: Corporate profiles are not available on CaseBauer client companies.

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Due Diligence

The typical IVD and devices product development paradigm has shifted over the last 10 years. In the past, organic internal development was responsible for the majority of new products. Today, partnerships and acquisitions play a much more important role in research and development engines.

Partnerships alter the risk profile significantly. Knowing and understanding the risk associated with a partnership is the first step in a successful collaboration. CaseBauer due diligence provides you with an assessment by a team of experienced business and/or technical experts to provide you with an independent understanding of the opportunity, the unknowns, and the risks.



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Technology Valuations

CaseBauer performs valuations of technologies, products, and companies.

1. market value for the asset;
2. identification of fatal flaws or reasons not to pursue a particular opportunity;
3. characterization of the scope and prognosis for the opportunity; and
4. identification of critical areas, if any, for additional analysis to further qualify the opportunity .

Valuations are accomplished through a combination of database, primary and secondary research methods including site visits, review and analysis of technical literature and relevant transactions. Depending on the study scope and requirement, the nature of the deliverable can vary from a topline go/no go assessment to a detailed economic forecast.

BENCHMARKING

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CaseBauer operates in five functional areas: Market Modeling, Strategy / Business Development, Benchmarking, Market Research and Business Services.

Our Benchmarking practice is focused on identifying "best practices" for your operation, optimizing your value-added products/services, and phasing out the marginal value offerings.

Comprehensive or selective services are available. A comprehensive program would include measuring your company's relative performance and competitiveness in a particular field. The second step is to identify and characterize the outstanding practices and processes from other organizations. The third step is to rationalize your current practices against the value paradigm of the users, the best practices of your competitors, and your organizational capabilities. A final step would be a remeasurement after complete implementation to quantify your success and fine tune your offering.

CaseBauer's benchmarking projects can extend beyond immediate competitors to incorporate other practices and processes. Examples of Benchmarking approaches include:

- Satisfaction Benchmarking
- Product/Service Benchmarking
- Functional Benchmarking, and
- Corporate Benchmarking





BENCHMARKING

Satisfaction Benchmarking

CaseBauer's customer satisfaction benchmarking can be a broad based customer satisfaction measurement of 100 or more parameters, or more narrowly defined. While many conventional satisfaction studies provide a "report card" of a company's performance, this does not go very far in helping a company select a plan of action. The basic premise of CaseBauer's customer satisfaction is to:

- convert unsatisfied customers to satisfied customers;
- outperform competitors where it counts: and
- reduce services that are costly, but not major influencers of satisfaction.

These analyses are commissioned both as broad corporate initiatives covering multiple countries and product areas and as targeted single segment projects.

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BENCHMARKING

Product or Service Benchmarking

Product or Service Benchmarking studies are detailed product feature and benefit comparisons undertaken to assess the relative competitive strengths and weaknesses of participants in a particular product/service area.

These studies can be structured as an audit, experiential review, or challenge study.

In constructing an audit, our analysts review published articles, manufacturer literature and package inserts, follow-up with manufacturers' technical service departments, and conduct field interviews with end-users, as required.

Experiential reviews would expand upon this analysis to include performance in the field. A common example would be a comparison of the hands-on time required to perform testing on competitive systems (time motion study).

A challenge study would assess performance against a defined protocol, such as a challenge panel or proficiency analysis.

Once established, these comparisons can be updated periodically on either a comprehensive (all products) or selected basis (specific product), as required.

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BENCHMARKING

Functional Benchmarking

Functional benchmarking is a strategic and operational comparison of companies' business performance, practices and processes.

Popular studies encompass areas such as instrument maintenance and repair service, customer service, R&D, or sales.

These studies often extend beyond direct competitors to include a comparison of companies in different industries (e.g., in vitro diagnostics and diagnostic imaging).

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BENCHMARKING

Corporate Benchmarking

Corporate benchmarking is a strategic comparison of companies' business performance, such as profitability, time to market, sales efficiency, R&D investment, etc.

A typical corporate benchmark would include:

- history and background of each company;
- operating performance to include profit and loss statement detailing sales, manufacturing costs, margins, R&D expenditures, sales/marketing, service, SGA, income (before taxes);
- organizational structure to include an outline of the management, business unit, and sales/service structure;
- product portfolios to include product mix, market shares, competitive position;
- research and development to include pipeline, core competencies and limitations; equities, licensing and partnerships; and
- corporate strategic intent and strategy implementation skills with future outlook.

Note: Corporate benchmarking is not available on CaseBauer client companies.

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MARKETING RESEARCH

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CaseBauer operates in five functional areas: Market Modeling, Strategy / Business Development, Benchmarking, Market Research and Business Services.

Our Market Research practice was developed to source data driven CaseBauer client services such as market simulation models, price sensitivity analyses, and product design tools. The practice was expanded in 1999 to provide stand alone market research studies using the methods and standards developed for our market simulation models.

Our research capability extends to 14 countries in North America and Europe. We serve 8 native languages. We have the capacity to survey up to 3,000 participants in a study.

Our practice mix includes high level expert studies (e.g; health ministers, politicians), technical studies (e.g; human factors, best practices, pricing audits, market segmentation), longitudinal surveys (e.g; customer satisfaction) and opinion surveys (e.g; awareness, image analysis, marketing campaign testing).

Our research venues include:

- One-on-One Interviews
- Interactive Surveys
- Dyad Groups
- Focus Groups
- Global Focus Groups
- Phone Surveys
- Internet Surveys
- Mail/Fax Surveys
- Tradeshaw Surveys (AACC)

Our method capabilities include discrete choice modeling, conjoint analysis, discriminant analysis, regression analysis, cluster analysis, Bayesian analysis, factor analysis, multidimensional scaling, and perceptual mapping.



MARKET RESEARCH

Tradeshaw Research Studies - AACC

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The AACC and CaseBauer co-sponsor an audit of the clinical laboratory professionals attending the AACC's annual meeting. This independent audit, performed by CaseBauer, is published annually and provided at no charge to meeting exhibitors. The audit is designed to assist program managers, product managers, and sales management in the planning for the meeting. There survey size is typically 700 - 800 respondents and the data analysis includes a 2 and 5 year trend analysis.

In addition to the audit, CaseBauer is also available to conduct custom studies from it research facilities at the meeting. AACC meeting studies are turnkey and can be set up with a short lead time and minimal support. These studies are short cycle; with results issued shortly after the meeting. These studies offer a unique opportunity to reach diverse audiences that would otherwise be difficult to recruit in any other single locale, such as:

- National Organizations (e.g.; Tenet, Kaiser)
- Early Adopters of Technologies or Products (e.g.; users of a recently released product)
- Group Purchasing Organization Members (e.g.; Premier, VHA)
- Commercial Laboratory Directors (e.g.; Quest, LabCorp, Mayo)
- Core Laboratory Directors
- Molecular Diagnostic Sites
- Laboratory Automation Sites
- Point of Care Coordinators

AACC meeting studies are also an opportunity to have management observations (e.g.; focus groups) that might otherwise be difficult to coordinate.

On-Site Focus Groups - Our focus group facilities are located in Marriott Hotel which is connected to the Pennsylvania Convention Center. CaseBauer information booths will be set up in the lobby of the convention center and on the Exhibition Hall Floor. Focus Group services include project design, discussion guide development, sample design, recruitment, expert moderation, all facilities, video and/or audio tape recordings, honoraria, and final reports. Groups are pre-recruited and/or recruited on-site.

Written Surveys - CaseBauer will have survey desks set up in high traffic areas near the AACC registration desks and on the Exhibition Hall Floor near the main entrance. We have the capacity to field between 50 - 500 surveys at this meeting depending on the field of study. Survey projects include project design, questionnaire development, sample design, recruitment, fielding, data tabulation, honoraria and final reports. Respondents are recruited on-site.

One-on-One Interviews - CaseBauer interview facilities are located in the Philadelphia Convention Center. CaseBauer has the capacity to conduct from 30 - 50 interviews per project. Respondents can be pre-recruited and/or recruited on-site. One-on-one interview assignments include project design, discussion guide development, sample design, recruitment, expert interviewing, all facilities, honoraria, and final reports. Respondents can be pre-recruited and/or recruited on-site.

BUSINESS SERVICES

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CaseBauer operates in five functional areas: Market Modeling, Strategy / Business Development, Benchmarking, Market Research and Business Services.

Our Business Services practice supports R&D programs, new product ventures, start-up companies, new business ventures, and new business units.

In short, our Business Services practice supplements the world class efforts underway in your laboratory with a comparable business development, marketing, sales, or service capability. This is particularly important if you do not yet have your marketing principals in place, are understaffed or in transition, or are looking to advance your internal standards.

Services can be provided on a turnkey basis or as a collaborative effort with you or your staff.

Our most commonly requested business services include:

- Venture / Start-up Company Foundation Database
- Business Plans
- Medical/Scientific Advisory Boards
- Marketing Plans
- Sales / Service Plans
- Pricing Administration Plans





BUSINESS SERVICES

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Venture/Start-up Company Foundation Database

Acquiring the market and competitive information to run a new venture or start-up business is a daunting task; budgets are lean and staffing is light. The information needs for guiding a new/novel business are many. The challenges include:

- obtaining the market feedback necessary to build successful products and develop a strategically sound business model;
- attracting top notch talent to the company;
- validating the business or product concepts for investors, both current and prospective; and
- courting strategic partners at a peer level.

Start-up misques and failures can often be traced to: 1) making critical decisions and commitments based on anecdotal or "free/second hand" data; 2) not having information when you need it to support predictable critical decision points; and 3) overspending early on and not having the resources or credibility to support the continuing needs of the business.

CaseBauer's business foundation service is a resource designed for new ventures and start-up companies. With this service, we project your information needs over time (1-4 years.) and provide you with a single, leveraged database to meet your needs effectively and timely.

BUSINESS SERVICES

Business Plans

Your business plan is the backbone of your business.

Whether you are expanding or recasting a business plan, CaseBauer provides consulting and conceptual analysis for your new business venture.

CaseBauer has over a decade of experience reading and evaluating business plans for investors and in helping new business ventures and start-up companies.

We provide both turnkey or facilitation planning services.

A typical business plan would encompass the following components:

- Executive Summary
- The Company
 - Current Status
 - Objectives, Near-term
 - Objective, Long-term
 - The Management Team
 - Management Objectives
- Markets and Competition
 - The Present Market
 - User Benefit
 - Other customer Benefits
 - Market, Near-Term
 - Market, Long-Term
 - Summary of the Projected Market
 - Competition
 - Projected Sales and Market Share
 - Specific Target Markets
 - Sales Strategy to Reach Objectives
- The Products
 - Theory of Operation
 - Applications
 - Product Economics and Advantages
 - Present Product Status
 - Scale-Up Requirements (if any)
 - Patents and Proprietary Know-How
- Selling
 - Current Selling Method(s)
 - Selling Method(s), Near-Term
 - Selling Method(s), Long-Term
 - In-House Sales support
 - Pre-Contract Sales Costs (if any)
 - Custom Engineering Sales Requirements (if any)
 - Product Pricing and Warranties
- Manufacturing
 - Facilities Needed
 - Make/Buy Considerations
 - Major Purchasing Issues (if any)
 - Second, Third Sourcing Needs
 - Manufacturing Engineering Support
 - Quality Control Plans
 - Staffing Requirements
- Financial Data
 - Financial History
 - Expansion Requirements, Budgets
 - Financial Projections
 - Summary of Operations Prior to Financing
 - Current Stockholders, Number of Share
- Investment
 - Use of Proceeds
 - Description of the Offering
 - Appendices
 - Management Team Biographies
 - Other Important Data

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Medical/Scientific Advisory Boards

CaseBauer conceives, recruits, and manage medical / scientific advisory boards. These advisory boards provide guidance and perspective to your management team and enhance your company's credibility in the business community, and the market.

Common board objectives include:

- providing guidance in the design and implementation of product development and R&D programs;
- catalyzing a positive image for the client and the client's products with industry leaders via "word of mouth" (influence of industry "influencers");
- helping to influence policy makers (reimbursement) and private third party insurers;
- providing endorsement of the company and its products with current and potential investors and marketing partners; and
- providing guidance in the development of sales and marketing plans and the design and implementation of after-the-sale programs.

The objective of your board will be tailored to your needs.

BUSINESS SERVICES

Marketing Plans

● Client Services

Casebauer marketing plans are thorough, and fact based.

● Consulting Team

We provide both turnkey or collaborative planning services. We can write your plan from your fundamental ideas, facilitate your staff in writing plans, or review and comment on a plan that have been written.

● Articles, Interviews

A typical marketing plan would include some or all of the following components:

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- Executive overview
- Market review
 - Trends overview
 - Market segments
 - Target market (Primary and Secondary)
- Competitive review
- Product and Business Review
- Strength, Weaknesses, Opportunities, Threats
- Goals and objectives
 - Sales objectives
 - Marketing objectives
- Strategies
 - Positioning
 - Product (design and line extensions)
 - Pricing
 - Partnerships
 - Distribution
 - Communications/promotion
- Action Plan and Implementation
 - Media plan
 - Budget
 - Schedule
 - Assignments
- Evaluation
 - Lead tracking systems
 - Sales reviews
 - Business Plan Reconciliation



BUSINESS SERVICES

Sales / Service Plans

● Client Services

CaseBauer Sales and Service plans are detailed, practical, financially driven, and tailored to your specific sales opportunity.

● Consulting Team

● Articles, Interviews

We provide both turnkey or facilitation planning services.

● Industry Links

A typical sales/distribution plan would include some or all of the following components:

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- Plan Overview;
- Product and Services;
- Funding;
- Target Markets;
- Sales Model;
 - Direct Sales;
 - Distribution/Marketing Partners;
- Advertising;
- Clinical Studies;
- Organizational Rollout;
 - Geographic priorities;
 - Offices /Locations;
 - Staff Mix and Profile
 - Recruiting;
 - Training;
 - Customer Support; and
 - Business Plan and Marketing Plan Reconciliation.

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Pricing Administration Plans

CaseBauer Pricing Administrative plan are targeted, practical, financially sound, and they work in your hands. Our focus is on helping you achieve the full value of your product or service while avoiding pricing administration traps and pitfalls through the life cycle of the product.

We provide both turnkey or facilitation planning services.

A typical pricing administration plan would some or all of the following elements:

- Financial Goals and objectives
- Price Presentation and Assignment (loss leaders, value added services, shifting, bundling);
- Price Justification
- Financing (cash, capital lease, reagent rental)
- Contracts
- Price Life cycle management Price Segmentation (GPO, national accounts, government, bellwethers sites, centers of excellence);
- Price Administration Training and Tools
- Business Plan and Marketing Plan Reconciliation.

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