

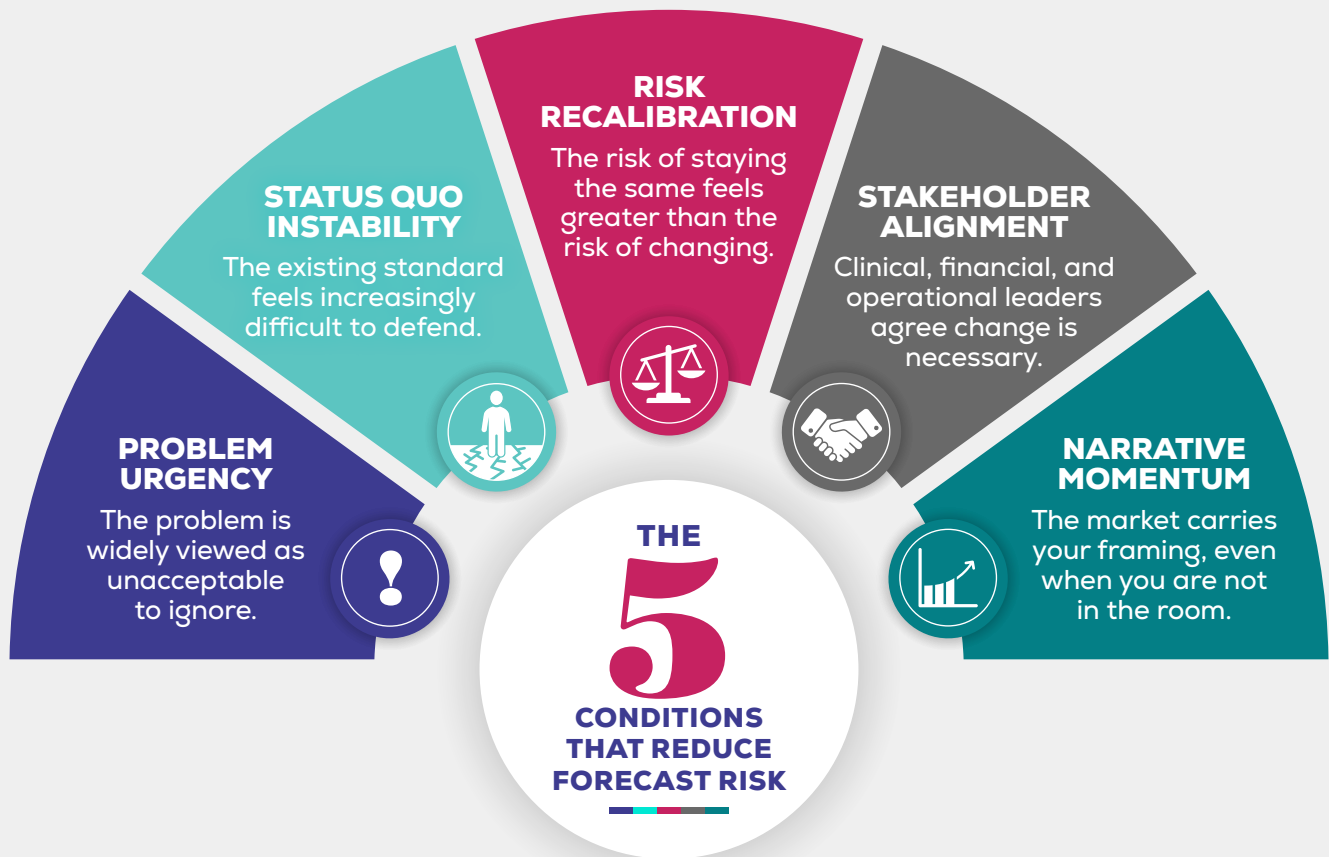
# Stalled Growth Isn't a Surprise. It's Inertia.

Most launches treat the inflection point like a date. It's not.

It's the moment staying the same feels harder to defend than changing—the Market Belief Threshold.

Calendars don't cross it. Belief does.

The five conditions below are how you engineer that shift—pre-launch, by design.



Growth forecasts assume win rates rise, cycles shorten, expansion gets easier.

It rarely happens—not because the product is weak, but because the conditions were never in place.

If any of the five are weak, the forecast is already at risk—regardless of product strength.

## Key Takeaways

**1**

**Time does not reduce resistance. Market conditions do.** Growth accelerates when resistance declines—which only happens when the five conditions are present in the market.

**2**

**Weak conditions destabilize your launch.** Any weakness across the five compounds risk—regardless of product strength, clinical data, or commercial spend.

**3**

**The five conditions are pre-launch design decisions.** They are built in the 12–24 months before launch. Build them later and the cost compounds—in time, capital, and reputation—often beyond what the company can afford.

**4**

**Forecast risk is detectable before it shows up in the numbers.** Once it is visible in the model, correction is already expensive...and you may not have the runway to fix it.

## CASE STUDY

### Provenge: When the Science Worked and the Market Refused

Wall Street modeled a billion-dollar drug. Provenge peaked at \$325 million just three years after launch. The next year, Dendreon—the company behind the blockbuster—filed for bankruptcy.

On paper, Provenge looked like a breakthrough.

It was the first FDA-approved autologous cellular immunotherapy for metastatic prostate cancer—a scientific first backed by phase 3 survival data and enormous expectations.

But the launch ran into something stronger than the science: The market's existing behavior.

Provenge improved median survival by 4.1 months. But it produced no tumor shrinkage, no PSA decline, and no visible signal that oncologists were trained to associate with treatment success.

At the same time, the therapy introduced an entirely new workflow.

Patients underwent leukapheresis. Cells were shipped to a Dendreon manufacturing facility, processed, and returned for reinfusion within a narrow time window. Clinics had to coordinate scheduling, reimbursement, logistics, and infusion capacity around a single therapy.

The burden was substantial.

And for many oncologists, the benefit didn't feel substantial enough to justify the change.

That was the real problem.

Provenge crossed the FDA threshold. **It never crossed the Market Belief Threshold—the point at which staying the same feels harder to defend than changing.**

Then the substitutes arrived.

Zytiga and Xtandi entered the market within two years, delivering survival benefits through dramatically simpler workflows.

No apheresis.

No manufacturing coordination.

No infusion suite.

No operational redesign.

The community didn't need to rethink how it treated patients. It only needed to write a prescription.

Oncologists kept asking: "Why change?"

That's why the growth curve never inflected.

Approval enabled availability. But belief never shifted enough to change behavior.

**Lesson: A first-in-class approval does not create adoption. If the market doesn't believe the new approach is worth the operational, clinical, and cognitive cost of change, the standard of care holds—and lower-friction substitutes win.**

## Discussion Questions

Use these prompts to stress-test your next launch plan.



What observable evidence suggests the current standard is becoming harder to defend—and which of the five conditions is driving that shift?



If a lower-friction substitute enters 18 – 24 months after our launch, what evidence suggests the market would still choose us instead of defaulting to the easier option?



What evidence suggests the market is already changing how it evaluates the problem—not just reacting positively to our data?

**Once the market chooses the easier path, reclaiming momentum is far more expensive than engineering belief before launch.**

- ✓ **Score your market with the Commercial Growth Scorecard**—the diagnostic for forecast risk—before your next leadership meeting.
- ✓ **Request a Pivotal Commercial Design Review (PCDR)**—pressure-test whether your market is positioned to cross the belief threshold before you scale commercial spend.



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