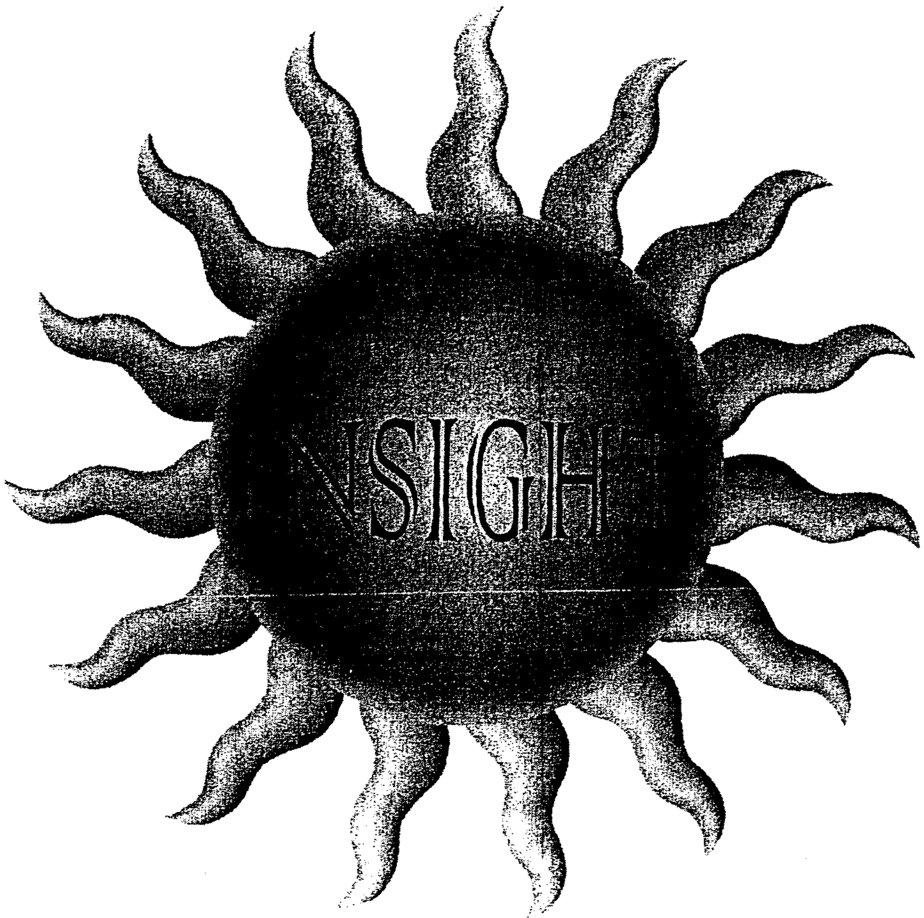
Basic Training



Participant Guide

2002

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Key Takeaways....

WAR	Merck Connect	FSNET/UUNET

Tab "Module 2"

Basic Principles

Territory Management

Introduction to Basic Principles & Pre-call Planning

Module 2

Notes

Agenda - Module 2

- Overview of Basic Principles
- Call planning process
- Customizing the Weekly Activity Report
- Synchronizing Data/Merck Connect
- Who wants to be an Awesome Rep on Territory?
- Pre-call Planning in Insight

Notes

What is Market Volume?

- Market Rx Volume is the number of prescriptions written within an entire market for the customer.
- Allows you to target customers based on the volume of prescriptions they write within a specific market.

Notes

What is Rx Volume?

- Rx Volume is the number of prescriptions written for a specific product by a customer.
- Allows you to target customers based on the number of actual prescriptions written for a product.

Notes

What's the difference between Market Volume and Rx Volume?

Market Rx Volume - 300
Rx Volume - 100

- Dr. Jones wrote 300 prescriptions for NSAIDs. 100 prescriptions were written for VIOXX.

Notes

What is Market Share?

- Market Share - represents a percentage of a pool of Rx's
- Market Share = Rx Volume/Market Volume x100
- New Rx Share - represents new prescriptions. Gives you a good idea how your business is trending.
- Total Rx Share - represents new and refill prescriptions

Notes

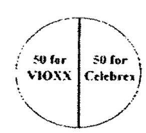
How can a physician's New Rx Share for a product be higher than the Total Rx Share, isn't New a component of Total?

- Market share represents a % of a pool of Rx's.
- New Rx Share represents the product's % of the pool of the New prescriptions while total Rx share represents the product's % of the pool of total prescriptions.
- Since the sizes of the pools differ, it's not uncommon for the New Rx share and the Total Rx share to differ.

Notes

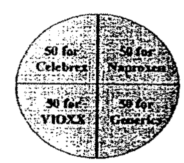
New Rx Share vs Total Rx Share

New Rx Share - 50 %



100 new prescriptions written for NSAIDs - 50 of the 100 written for VIOXX.

Total Rx Share - 25 %



200 total prescriptions written for NSAIDs - 50 of the 200 written for VIOXX.

Notes

What is Plus Prescriber (+Rxer)?

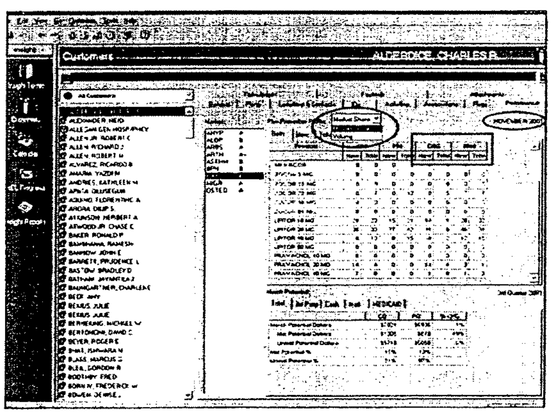
- Individual market share report for each physician.
- Pinpoints a prescriber's current habits.
- Used to identify which products are currently in favor with the physician in order to develop a strategy to change these prescriptions into Merck prescriptions.

Notes

What time frame does the +Rxer data represent in Insight?

- Current Month (CM) - data for the month that was most recently sent to the field.
- Previous Month (PM) - data for the month prior.
- Rolling 6 Months (R6M) - data for the six months prior.

Notes

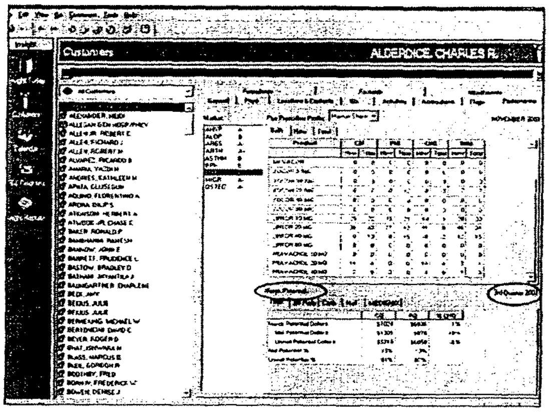


Notes

What is Merck Potential (MP)?

- A quantitatively derived dollar estimate of each prescriber's total prescribing volume that can be realistically converted to Merck prescriptions.
- Calculated quarterly using +Rxer market share and volume data.
- Serves as a *targeting tool* to help you choose who to target based upon the total $ a customer is able to contribute to your business
- A+/B Category Rating

Notes



Notes

Who will receive +Rxer and Merck Potential data?

- Only physicians with valid MEDED #'s

AND

- All A+/B MP Category Rating physicians

OR

- All targeted (02' and Spec) within a Market

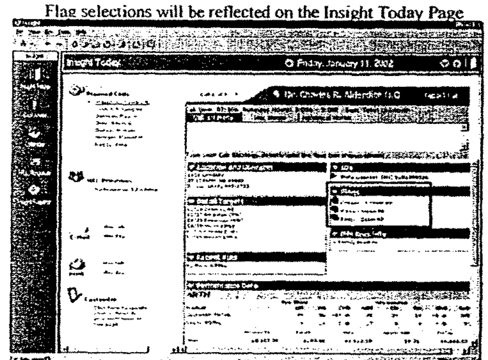
Notes

What is a Flag?

- A way of grouping customers that have similar prescribing trends.
- Three types: personal, cluster, headquarter
- Signals you to deliver specific product discussion based on how customer is flagged.
  - Example: Zocor 02, Vioxx 02
- All flagged 02 customers should be included in weekly routing.

Notes

Flag selections will be reflected on the Insight Today Page



Notes

What is a Detail?

- Product discussion with a customer
- ***Details should be recorded in Insight in the order they were discussed with the customer.***

Notes

Call Planning and Reporting Process

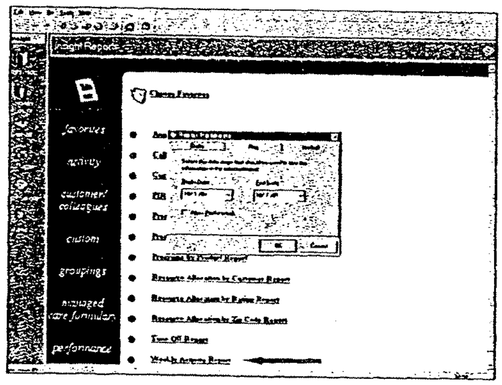
- Utilize the Insight Today View to view customer information prior to planning your call strategies
  - Analyze +Rxer data and call history.
- Develop call strategy and enter into Insight
- Make call on customer
- Report calls as soon as possible after the call
- Call notes will increase team selling

Notes

Weekly Activity Report

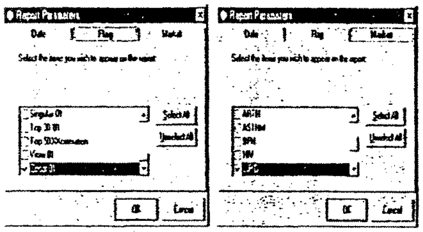
- Summarizes your call activity for the week
- Located in Insight Reports
- Highlight your week in the Notes section
- Send to your Business Manager and ROA
- Can be customized to reflect calls on physicians with a particular flag and/or physicians with a particular category rating.

Notes

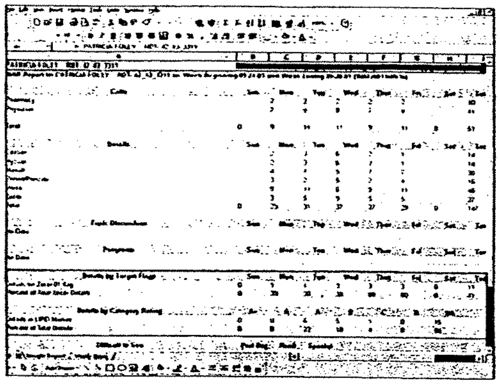


Notes

WAR: Customize to reflect flagged physicians or physicians ranked in a particular market



Notes



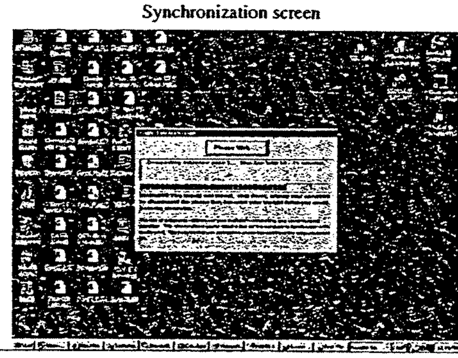
Notes

Synchronization

- Conduct a Merck Connect Session 5 days/week
- Call echoing happens during this process
- Headquarters sends information to you by this system (new flags, factoids, plus prescriber, reports, etc.)
- Utilize the Autophone Feature
- Wait until the session is complete before disconnecting your phone line/shutting down computer.
- Call the helpline if you are having problems.

Notes

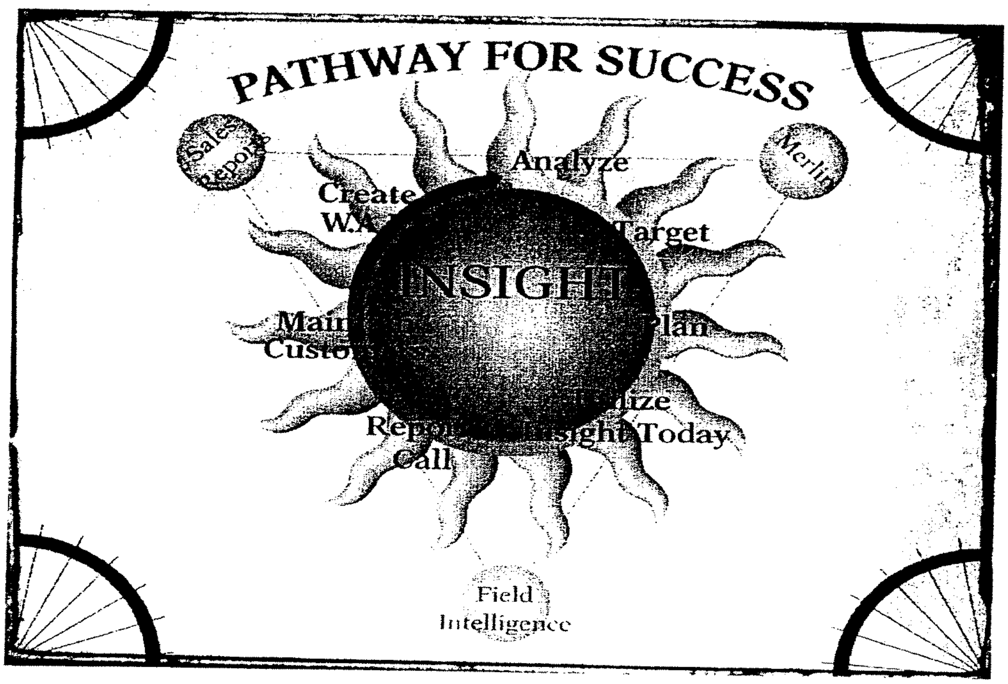
Synchronization screen



Notes

Tab "Module 3"

Pathway For Success



This model depicts a path that leads to successful results on territory. Over the next couple of days, we will focus on all of the steps depicted in this model.

Notice Insight is in the center of these activities. Insight enables you to do these activities in less time with more effectiveness.

Running My Business

As a business operator, answering these questions can help you to run your business successfully. Consider the answers to these questions when following your Pathway for Success.

- Who are my customers?
- Which customers offer the most potential?
- Are my markets growing? steady? declining?
- Is my market share growing? steady? declining?
- How will I attract? hold? increase my market share?
- Who are my top competitors?
- How are their businesses: steady? increasing? decreasing?
- What are their strengths and weaknesses?
- How does their product or service differ from mine?
- What resources are available to provide assistance in this area?
- Based on Merck's strategies, how will I promote my products?

New Territory Scenario

From the Blue Chip activity, you know how important information is to your ability to analyze your customers. Let's look at a situation that is more realistic. Read the following scenario and answer the question. Use the space below to take down notes about how Merlin Sales Reports are used to solve the scenario.

Imagine that you are a new Merck representative, and have just completed Merck Basic Training. It is your first week on your own. It is your job to decide:

- Which product in my product group has had the greatest impact on my performance (positively or negatively) to date?

- Based on my finding which products need more attention?

- How is my product performing compared to the competition?

Field Sales Performance Report (FSPR)

Definition:

The Field Sales Performance Report (FSPR), issued monthly, provides data on sales dollars, objectives and performance. It is the most complete picture of your territory because it includes sales for each product by every customer segment. This is the report to look at first when analyzing a territory.

Benefits:

The Field Sales Performance Report allows you to:

- Identify which customer segments to target.
- Determine which products are driving your business and their sales by customer segment.
- Identify the impact of each promoted USHH product on overall territory performance.
- Have a starting point in Business Analysis.

Key Point:

This is the report on which bonus is paid.

Prescription/Plan Market Share Report (PPMSR)

Definition:

The Prescription/Plan Market Share Report contains market share values expressed as a percentage of prescriptions (new and total) by payor type. The third party market share information is then broken down by plan, and the mail order is broken down into *National RX and All Other Mail Order*. The Prescription Plan/Market Share Report is based on prescriptions dispensed through the retail channel and mail order companies. This report is issued monthly.

Benefits:

The Prescription/Plan Market Share Report allows you to:

- Determine different payor types (cash, Medicaid, third party and mail order contribution to the territory).
- Identify market share trends by payor within customer segments, as well as within individual third party plans and mail order.

Key Points:

This is the primary report to track various payor segments and third party organizations for market share of both Merck and competitor products.

- Plan Cutoffs

  Due to space and paper limitations, there may be situations where not all of the third party plans can be printed on the report.

Field Sales Performance Report & Prescription/Plan Market Share Report Worksheet

Based on the FSPR and PPMSR report handouts, answer the following questions about your business.

1. Which product is contributing the most Y-T-D sales dollars to the total geography?

2. Based on your answer above, what are the sales, growth %, and PPO of this product Y-T-D?
   - Sales:
   - Growth:
   - PPO:

3. What is the territory total, RCQ % Volume Change for the *ANTIARTHRITIC* Market? How will this information impact your strategy for this product?

4. What is the territory total Market Share Change from RPQ to RCQ for:

   Vioxx®:

   Celebrex®:

   Arthrotec®:

   Relafen®:

   Daypro®:

   Ultram®:

   Mobic®:

   Ibuprofen:

   Naproxen:

Merck Potential

Definition:

Merck Potential (MP) is a quantitatively derived dollar estimate of each prescriber's total prescribing volume that can be realistically converted to Merck prescriptions. A physician's Total MP dollar value represents the physician's potential value to Merck on a quarterly basis. Merck Potential is calculated quarterly using PLUS Prescriber market share and volume data. The goal is to move each physician's Merck share to the target share.

Benefits:

Merck Potential is designed to help you make targeting and resource allocation decisions in your geography. Merck Potential can help you address the following questions:

- Which physicians are the most important to my retail business? MP Total $
- Which physicians are prescribing the most Merck products? MP Met $
- Which physicians have the most potential for growth? MP Unmet $

Key Points:

Merck Potential is a targeting tool to help you choose who to target based upon the total dollars the customer is able to contribute to your business. It allows you to spend more time and resources on the customers which have the greatest potential.

- Met Potential $

  The dollarized value of the actual number of prescriptions written for Merck products.

- Unmet Potential $

  The dollarized value of the projected number of prescriptions each physician has the potential to write for Merck products, less what they are currently writing.

Total Merck Potential $ = Met Potential $ + Unmet Potential $

PLUS Prescriber

Definition:

PLUS Prescriber is an individual market share report for each physician. It pinpoints a prescriber's current habits. Use PLUS Prescriber to identify which products are currently in favor with the physician and develop a strategy to change these prescriptions into Merck prescriptions.

Benefits:

Plus Prescriber allows you to:

- Identify the current prescribing habits of a physician in a particular market segment.
- Develop targeted messages to reinforce or change habits.
- Identify the physicians most recent trends.

Key Points:

The data of Plus Prescriber is based on the number of prescriptions written and not the number of tablets dispensed.

Plus Prescriber data is only taken from the retail market segment.

Physicians are placed into Category Ratings based upon how many prescriptions they write in a class compared to all other physicians per quarter. The Category Ratings are A+, A, A-, B, C, and D. A+ is the highest and D is the lowest of writers.

New Territory Scenario (Continued)

Imagine that your manager will be traveling with you on your first day. She has requested to see the top six physicians in the Antiarthritic market.

List the names of the Top Six Physicians in the Antiarthritic Market below.

1.

2.

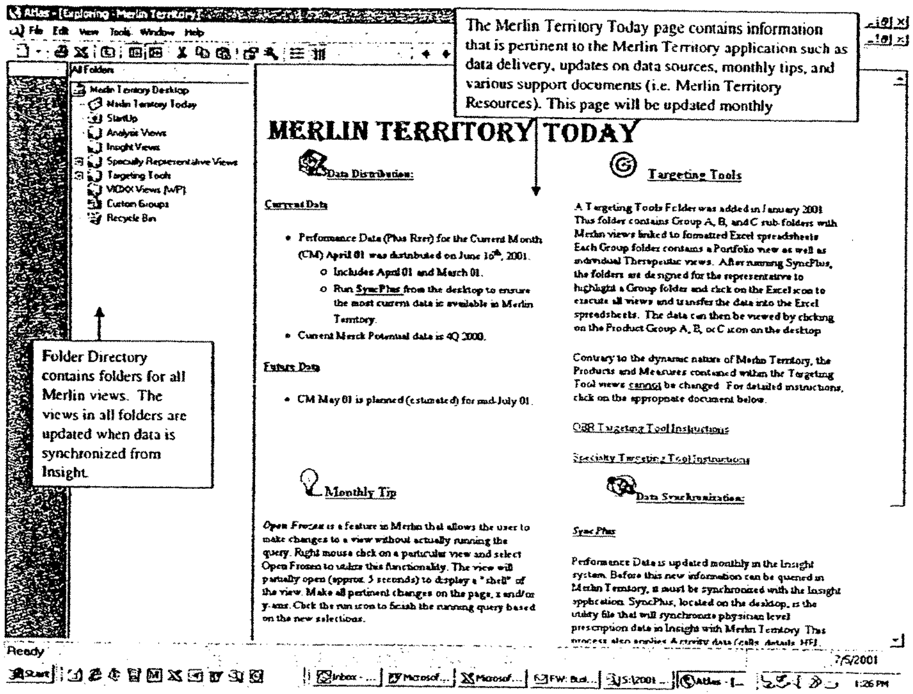
3.

4.

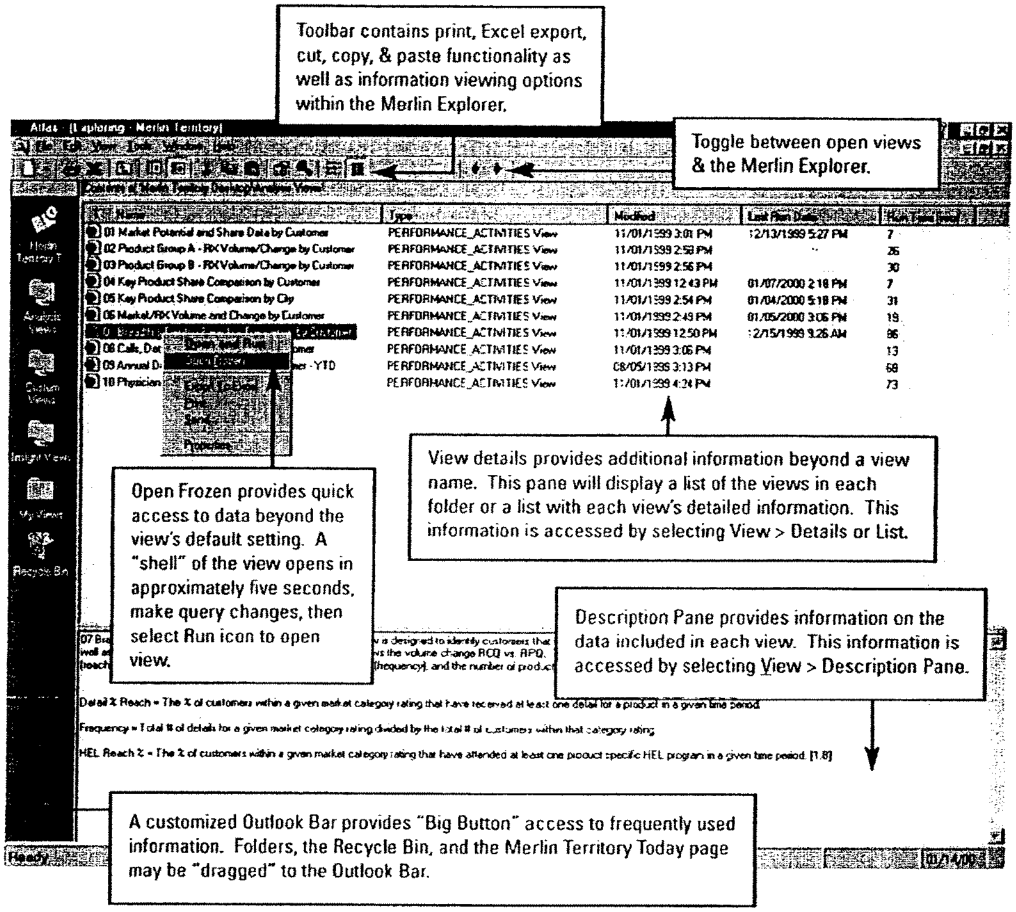
5.

6.

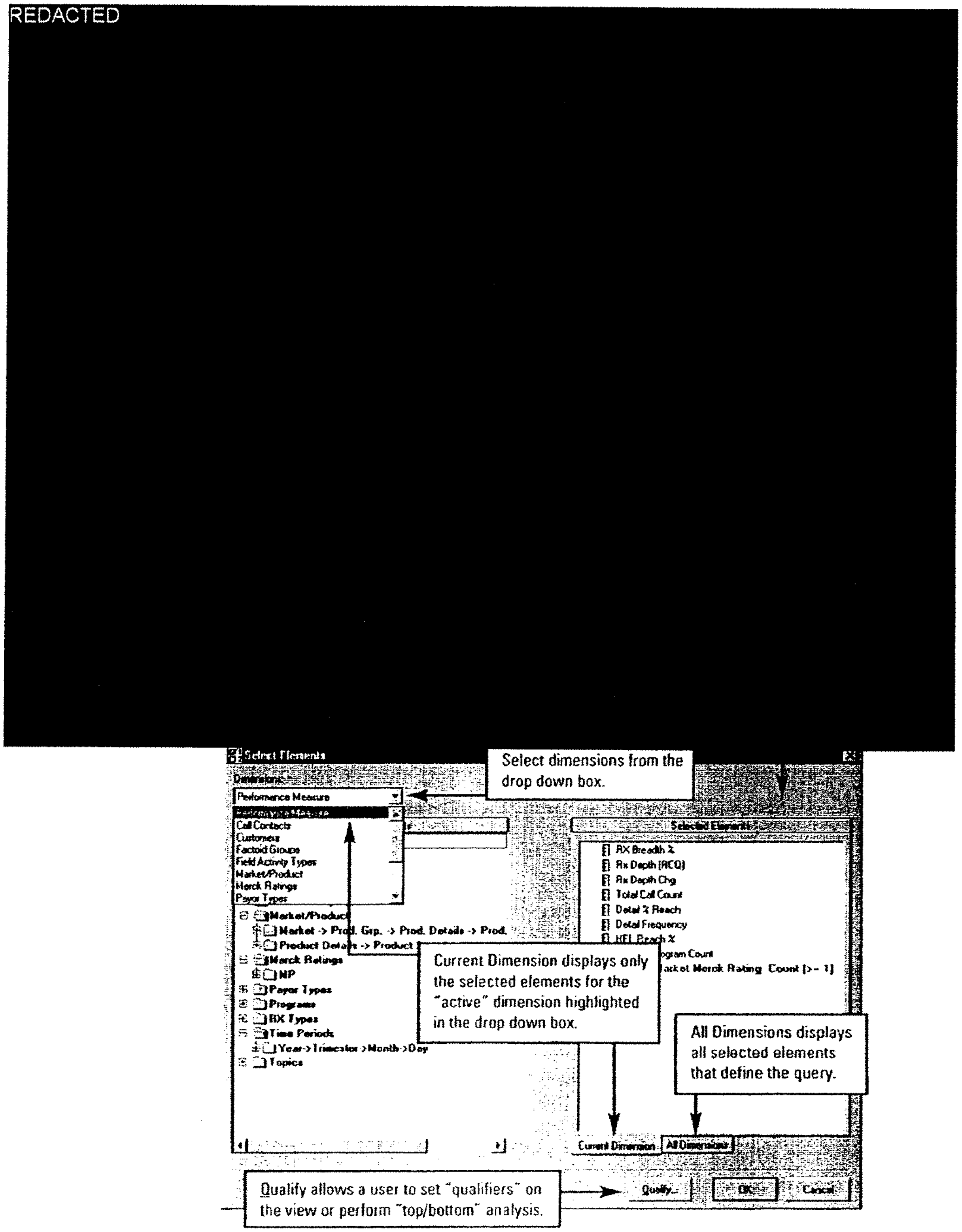
Merlin Territory Today



Merlin Explorer



Merlin View Layout & Navigation



REDACTED

[redacted]

REDACTED

[redacted]

REDACTED

[redacted]

Merlin Scenario 1

Now it's your turn to use Merlin to solve a business problem. Complete the scenario exercise that corresponds to your group number. If you have any questions, please ask the trainers for help. After you work through the scenario, be prepared to share your responses with the larger group.

You are reviewing the Field Sales Performance Report Summary (FSPR) for your territory. You notice that the PPO for Vioxx® is below 100%. The Antiarthritic market is shrinking. Market share for Vioxx® has decreased slightly. Next week, your business manager will be riding with you and wants you to identity twelve customers. The top six customers to target with a "Growth" strategy and the top six customers to target with a "Maintenance" strategy.

Hint: Focus on the high prescribers of Celebrex to identify the six physicians to target with a growth strategy.

- Which view gives you this information?

- How did you manipulate the view to obtain the information you want? List out the steps.

- List the names of the physicians (use New Rx volume).

Top six customers for Growth Strategy	Top six customers for Maintenance Strategy
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.
6.	6.

REDACTED

[redacted]

Merlin Scenario 3

REDACTED

[redacted]

- Which top 5 physicians have the highest Rx volume for Celebrex?

Merlin Seek & Find

Merlin allows you to easily manipulate views and quickly find the information you need. The following questions will enable you to be more comfortable utilizing Merlin. Working alone, search in Merlin and answer the following questions. If you have any questions, don't hesitate to ask for help. Unless otherwise mentioned, always focus on NEW Rx and always remember to select the "02" product flag when running views. *Complete the exercises for the promotional products that pertain to you.*

REDACTED [redacted]

6. Out of the VIOXX 02' target universe, how many Orthopedic Surgeons are in your call deck?

7. Find the top 3 prescribers of Vioxx® in your call deck.

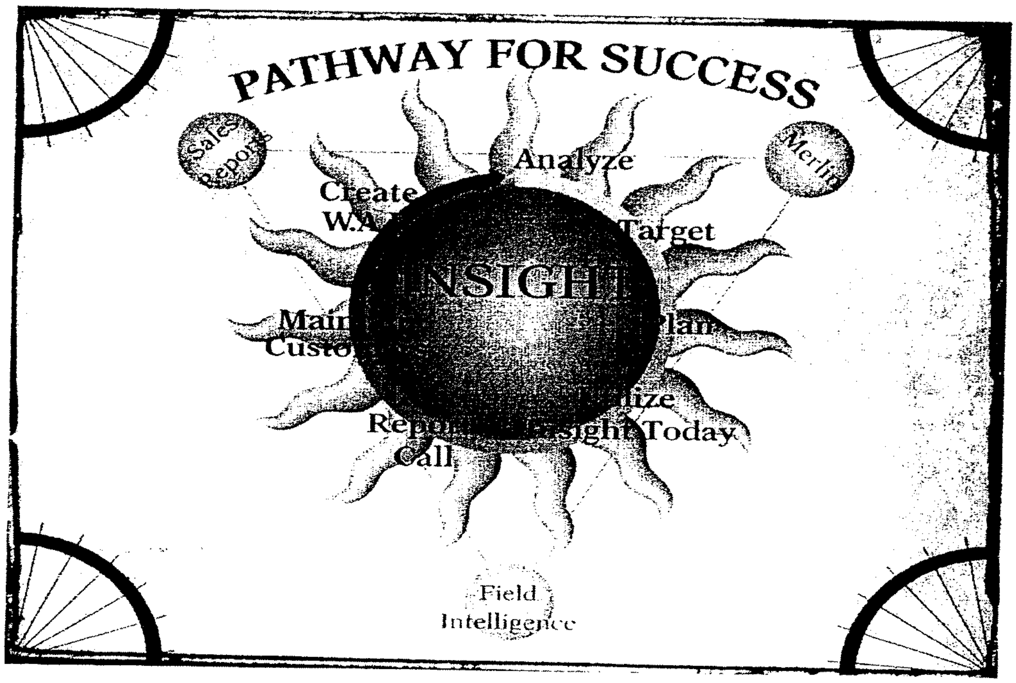
8. Which physician in St. Joseph has the largest positive share change for VIOXX®?

9. What is the New Rx Volume (CM) for VIOXX® for this customer?

REDACTED [redacted]

Tab "Module 4"

INSIGHT: Customizing the look of Insight



Insight Today

Customers View

Calendar View

Insight Reports View

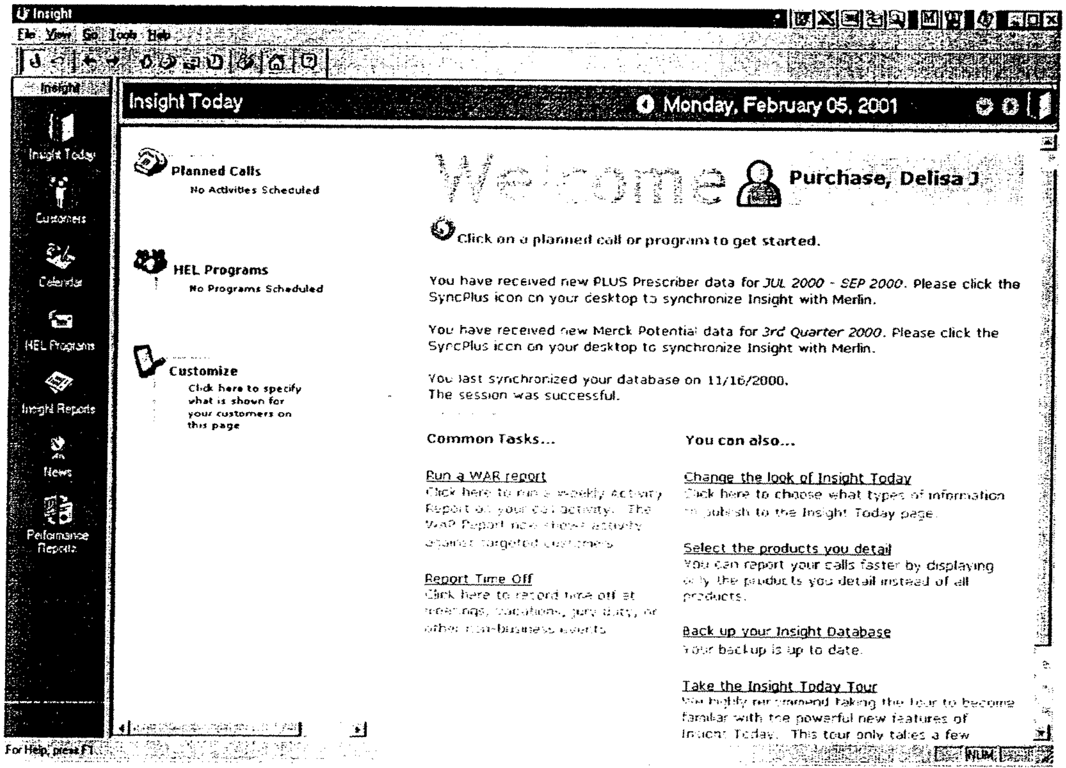
HEL Programs View

Insight News

Performance Reports View

Insight Today Welcome Page

Insight 3.0 opens to the Insight Today Welcome Page. On this page, you will see information on your data transmissions including Insight Synchronization and Plus Prescriber downloads. You will also be able to Run and Send a WAR Report and Report Time Off Territory. Lastly, you will be able to Customize Insight Today, Back up your Insight Database, and Take the Insight Today Tour from here.



Customizing the look of Insight

Insight provides the opportunity to customize the application to meet your needs. Go to *Change the look of Insight Today* link, the *Customize Icon*, or *View Options* to customize your Insight system. Start with the Today tab.

Today Tab

This is where you select what you will see on your Insight Today view. This view provides you with your daily schedule. We suggest you have Call Strategy, Flags, Merck Potential, Hot Notes, IDs, PIR, & Plus Prescriber displayed on your Insight Today page. Experiment to determine what works best for you.

Hint: If you are going to have Plus Prescriber displayed on your Insight Today page, only check a few key products. The more products you have checked. The slower the system runs.

Customers Tab

This is where you determine which factoids are displayed for your customers.

Reports Tab

This is where you determine the reports that will show up in your favorites folder. We suggest that you select the "Weekly Activity Report".

Calls

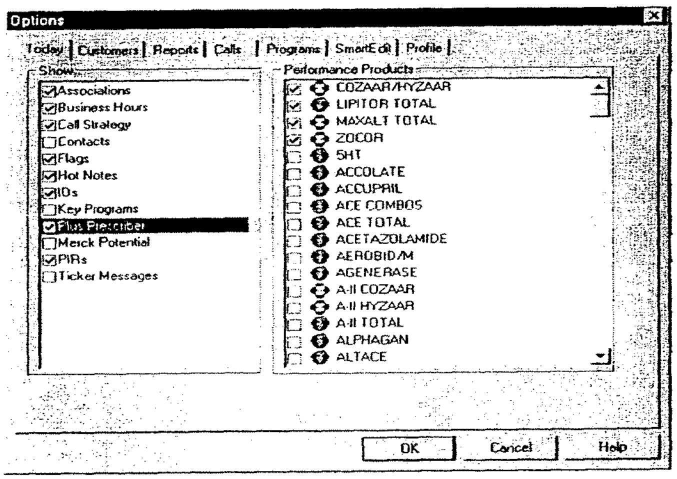
This is where you customize and determine the order of your product detail list. This is the list of products that will appear when you report a call.

Program Tab

Determines the speakers and HEL locations that are downloaded to your system.

Smart Edit

This allows you to enter abbreviations for frequently used words which will display in your call and weekly notes (ex. Type Vx for Vioxx®)



Insight: Customer View Tabs

There are several tabs listed in the Customer View. As a new representative, you are most likely to use the information contained in the General, Location, Activities, Flags, and Performance tabs.

Use the space below to note what kinds of information you can find under each of those tabs.

- General:
- Location & Contacts:
- Activities:
- Flags:
- Performance:

Insight: Planning For Your Customers

You have seen how to navigate in the Insight Today view. Now you'll populate your Insight Today with the targeted customers.

Using the Call Wizard, populate your Insight Today view with the following customers:

- Top Six Physicians in the Antiarthritic Market:
  1. Shoon Lee
  2. Charles Rhodes
  3. John Stafford
  4. Frederick Born IV
  5. James Grannell
  6. Teresita Villasis

- What did you learn about Dr. Lee from the Insight Today view that will help you shape your call strategy?

- What additional information about past call activity will help you in your call strategy? (Hint: In the Insight Today View look under Historical Notes)

With all of the information you have at your fingertips, you can easily develop a needs-based call strategy. Go to the Insight Today view and use all of the information available to you to create a Needs-Based Call strategy for each customer. Jot down some of the information used to develop these strategies.

Once you have entered your call strategies, be sure to check the Calendar View to confirm your planned calls are there.

Tab "Module 5"

Insight: Reporting Customer Calls

Once you have conducted the sales call, you need to report the call. The key to remember is that you always want to convert your Planned calls to Reported calls.

There is more than one way to Report a Call.

1. Click on the report call link (upper right hand corner)
2. Use the Call Wizard to Report Calls
3. In the Calendar View click on the customer name and open a planned call as reported.

From the Insight Today view, convert the planned calls to reported for the following customers. Be sure to type in Accomplishments and Next Call strategies for these customers. Also, plan calls for each physician listed below one month from now from the Next Call strategies window.

Dr. Charles Rhodes

Accomplishment:

Discussed the features/benefits of Vioxx® over Celebrex. Reviewed new acute pain data for Vioxx®. He will continue to Rx Vioxx®. He has seen good results with Singulair® in combination with ICS. Said he will be able to attend Zocor Roundtable next month.

Next Call Strategy (based on the accomplishment, formulate a balanced next call strategy for this customer):

Remember to plan a call one month from now.

Details:

Vioxx®, Zocor®, Singulair®

Samples:

Receipt#12354

PIR:

Physicians wanted more information on the safety of Vioxx® in elderly patients.

Dr. John Stafford

Accomplishment:

Discussed benefits of Singulair® as first line therapy. Reviewed positive managed care formulary status of Vioxx®. Reviewed new acute pain data for Vioxx®. He has seen good results with Fosamax® in patients that had a follow up DEXA one year after starting therapy.

Next Call Strategy (based on the accomplishment, formulate a balanced next call strategy for this customer):

Details:

Singulair®, Vioxx®, Fosamax®

Samples:

Receipt#12356

Dr. Frederick Born IV

Accomplishment:

Said he would continue using Vioxx® as first line therapy for acute pain and OA. Reviewed new acute pain data for Vioxx®. Reviewed information on once-weekly dosing for Fosamax®.

Next Call Strategy (based on the accomplishment, formulate a balanced next call strategy for this customer):

Details:

Vioxx®, Fosamax®, Singulair®

Samples:

Receipt #12357

Dr. James Grannell

Accomplishment:

Reviewed the benefits of Zocor®. Said he will attend the Cozaar® Roundtable next week. Reviewed new acute pain data for Vioxx®.

Next Call Strategy (based on the accomplishment, formulate a balanced next call strategy for this customer):

Details:

Zocor®, Cozaar®/Hyzaar®, Vioxx®, Maxalt®

Samples:

Receipt #12358

Dr. Teresita Villasis

Accomplishment:

Reviewed new acute pain data for Vioxx®. She indicated she would consider speaking for Merck on the benefits of Vioxx® to her colleagues.

Next Call Strategy (based on the accomplishment, formulate a balanced next call strategy for this customer):

Remember to plan a call one month from now.

Details:

Vioxx®

Samples:

Receipt #12355

PIR:

She wanted more information on the incidence of edema with Vioxx®

Check the Calendar View. How did the Planned Call icon change?

Explorer Activity

During your calls, the following information was uncovered with each of the customers listed below. Enter the customer maintenance information into the appropriate places in Insight. The clues may help you to determine where to go to look for the information.

Shoon Lee

Dr. Lee has opened an additional location - he will be at this location on Mondays and Fridays from 8 AM to 5 PM. The office address is 1356 Pine Avenue, St. Joseph, MI 49085. The phone number is 616-789-9675. He also attended your lunch (Hint: Select the new program button from the menu bar to record the lunch / FMC). The program was from 12:30-1:30. The other attendees you need to record are:

- Kathleen Andries, M.D.
- John Proos, M.D.
- James Grannell, M.D.

Clue: Best Times are specific for a location. Also, enter the zip code first.

Charles Rhodes

Dr. Rhodes is one of your Vioxx advocates - you found out that Pfizer is sponsoring a program in the Bahamas and he is attending. You want to make sure everyone that calls on Dr. Rhodes is aware of this.

Clue: Under the general tab is a "Hot Note".

You just received a message from WP that you need to flag the following physicians with the "General RBG – Vioxx® flag":

- Charles Alderdice, D.O.
- Betty Koshy, M.D.
- James Wierman, D.O.
- Daniel Hayward, M.D.
- Dave Puzycki, M.D.

Clue: Look under Tools - A Flag Wizard will help you out. The Flag Wizard allows you to attach flags to multiple doctors.

John Stafford

Dr. Stafford has a new partner, Dr. Joe Ward. Dr. Ward's address will be 1815 Anthony Drive, St. Joseph, MI 49085. His phone number is 616-429-4145. His State License # is 2401041240. Add Dr. Ward to your call deck

Note: When adding a new physician, you must choose one of the following quick types from the new customer wizard:

- Physician – Group Practice
- Physician – Solo Practice
- Physician – Hospital

*Also a State License number is required to add a new physician

Clue: Look under Customer's on the menu bar. Notice you can also add new customers here. Add Dr. Ward as a new customer – Select "physician group practice" and remember professional designation is M.D.

- Remember, you were unable to see Dr. Frederick Born IV. Move your planned call for today to 4 weeks from now.

Check Insight Today to ensure that the NEXT CALL strategies you entered during the Reporting Calls for Your Customers appear on Insight Today four weeks from today.

Insight Reports

Reports provide summary information on a variety of topics from customers to activity.

Working as a group, answer the questions below about your assigned report. Use the parameters listed for each report. Be prepared to share your answers with the rest of the class.

*Note: The training database only contains HEL activity data for Group B products.

Group 1:	**Activity / Time Off Territory**
Date:	06/01/01 – 10/01/01
Group 2:	**Activity / WAR Report (select flags)**
Flags:	Vioxx 02, Singulair 02, Zocor 02
Group 3:	**Groupings / Customer Flag Report**
Flags:	Maxalt 02, Fosamax 02, Cozaar 02
Group 4:	**Customer & Colleagues / Customer List Report**

- How might you use the information in this Report?

- How might your manager use the information in this Report?

- What information about creating or running this report do your classmates need to know?

As other groups share their answers, jot down any important information about each of these reports.

- Time off Territory Report

- War report (selected flags)

- Customers Flag Report

- Customer List Report

Territory Management Training - Business Analysis Template — Page 1

Instructions: Using the FSPR and PPMSR from your Territory Management Workshop as well as the Merlin and Insight training database, answer the following questions to analyze the business for your core promotional products.

Core Promotional Product

Field Sales Performance Report (FSPR)

1 What is the YTD PPO of the product? — 1

2 What is the YTD Growth of the product? — 2

3 What is the YTD total objective of the product? — 3

4 What % of sales does your product contribute to the total geography YTD? — 4

5 What % of sales does your product contribute to your product group YTD? — 5

Prescription Plan Market Share Report (PPMSR)

Look at NEW prescription data for RCQ (Rolling Current Quarter) for collecting the data below.

7 What is the % market volume change for my geography total? — 7

8 What is the market share for your product? What is the share change? — 8

	Market Share	Share Change
8		

9 Who is the lead competitor to your product? What is their market share? What is their share change? — 9

	Competitor	Share	Share Change
9			

10 What is the % contribution of each of the customer segments to your geography total? (summary page, column 2)

10a Cash — 10a

10b Third Party — 10 b

10c Medicaid — 10c

10d Mail — 10 d

Customer Information Analysis/ Merlin

11
- *Run Merlin View #4 for your targeted physicians and product.*
- *Choose your market for your lead product and 2002 target universe flag.*
- *Rerun the view*
- *Sort by Rx Volume to find highest volume prescribers for lead product.*

For each of the physicians identified, which competitor is impacting them the most? What are the competitors' Rx volume, Market Share, and Market Share change (RCQ vs RPQ)?

	Physician Name	Competitor	Competitor Volume	Competitor Market Share	Competitor Share Change
11a					
11b					
11c					
11d					
11e					
11f					
11g					
11h					
11i					
11j					

Call Planning/ Reporting Insight

12 For each of the physicians above, develop a NBS strategy for each customer and enter it into Insight for your pre-call plan.

13 Convert the planned calls into reported calls for each customer.

14 Send a WAR report to your trainer to profile your call activity on these customers.

Territory Management Training - Business Analysis Template

Page 1

Instructions: Using the FSPR and PPMSR from your Territory Management Workshop as well as the Merlin and Insight training database, answer the following questions to analyze the business for your core promotional products.

Core Promotional Product

Field Sales Performance Report (FSPR)

1 What is the YTD PPO of the product? 1

2 What is the YTD Growth of the product? 2

3 What is the YTD total objective of the product? 3

4 What % of sales does your product contribute to the total geography YTD? 4

5 What % of sales does your product contribute to your product group YTD? 5

Prescription Plan Market Share Report (PPMSR)

Look at NEW prescription data for RCQ (Rolling Current Quarter) for collecting the data below.

7 What is the % market volume change for my geography total? 7

	Market Share	Share Change
8 What is the market share for your product? What is the share change? 8		

	Competitor	Share	Share Change
9 Who is the lead competitor to your product? What is their market share? What is their share change? 9			

10 What is the % contribution of each of the customer segments to your geography total? (summary page, column 2)

10a	Cash	10a	
10b	Third Party	10 b	
10c	Medicaid	10c	
10d	Mail	10 d	

Customer Information Analysis/ Merlin

11
- *Run Merlin View #4 for your targeted physicians and product.*
- *Choose your market for your lead product and 2002 target universe flag.*
- *Rerun the view*
- *Sort by Rx Volume to find highest volume prescribers for lead product.*

For each of the physicians identified, which competitor is impacting them the most? What are the competitors' Rx volume, Market Share, and Market Share change (RCQ vs RPQ)?

	Physician Name	Competitor	Competitor Volume	Competitor Market Share	Competitor Share Change
11a					
11b					
11c					
11d					
11e					
11f					
11g					
11h					
11i					
11j					

Call Planning/ Reporting Insight

12 For each of the physicians above, develop a NBS strategy for each customer and enter it into Insight for your pre-call plan.

13 Convert the planned calls into reported calls for each customer.

14 Send a WAR report to your trainer to profile your call activity on these customers.

Tab "Appendix"

Merlin Territory Glossary

Term	Definition	Usage
Annual Detail Target	The optimal number of details (product-specific) a physician should receive in a year from all representatives. Annual Detail Targets are FBG-assigned according to physician value and capacity.	Allows you to target customers based upon their assigned product-specific annual detail numbers.
Attendance Count	The number of customers attending a product-specific program during a specific time period.	Allows you to assess attendance counts of HEL programs conducted within a specific time period. Designed to be used in conjunction with the Program dimension, not the Customer dimension.
Call Count	The number of calls recorded for a particular customer within a specific time period.	Allows you to target customers based upon the number of calls made on them in a specific time period.
Call Frequency	For a single customer, Call Frequency equals Call Count. For a group of customers, Call Frequency equals the average number of calls on the group during a specific time period.	Allows you to monitor the number of calls made on a customer or an average number for a group of customers.
Call Reach %	Call Reach % equals 100 for a customer with a Call Count of 1. Call Reach % for a group of customers is the percentage reached for that group, which have been detailed at least once.	Allows you to monitor the percent of a group of customers (i.e. A+ physicians) that have been called upon during a specific time period. Measure is useful primarily at Subtotal/Grand Total levels.
Customer Count	The number of Merck ratings a specific customer has in a particular market.	Allows you to count the number of customers within a specific subset. Necessary if the Merck Rating Dimension is placed on the y-axis. The measure should be qualified as: Customer Count >= 1

Term	Definition	Usage
Detail % to Plan	Defined as the percent of Annual Detail Target achieved within a specific time period. Calculation: Detail Count / Annual Detail Target *100	Allows you to monitor your detail activity against the determined number of annual details.
Detail Count	The number of details recorded for a particular product, within a time period, for a customer.	Allows you to target customers based upon the number of details conducted for a product in a specific time period.
Detail Frequency	For a single customer, Detail Frequency equals Detail Count. For a group of customers, Detail Frequency equals the average number of details on the group during a specific time period.	Allows you to monitor the number of product details made on a customer or an average number for a group of customers.
Detail Reach %	Detail Reach % equals 100 for a customer with a Detail Reach Count of 1. Detail Reach % for a group of customers is the percentage reached for that group, which have been detailed at least once.	Allows you to monitor the percent of a group of customers (i.e. A+ physicians) that have been detailed for a product in a specific time period. Measure is useful primarily at Subtotal/Grand Total levels.
Detail Reach Count	The number of details a customer has received for a product within a given time period. A 1 indicates that the customer has received one or more details and a 0 indicates no details..	Allows you to monitor whether a customer has been detailed or not for a product in specific time period. Measure is useful primarily at Subtotal/Grand Total levels.

Term	Definition	Usage
HEL Reach %	HEL Reach % equals 100 for a customer who has attended at least 1 product specific program. A zero means that customer has not attended any product specific programs. HEL Reach % for a group of customers is the percentage reached for that group, which have attended at least one product specific program.	Allows you to monitor customers that have or have not attended a HEL program for a specific product. Measure is useful primarily at Subtotal/Grand Total levels.
HEL Reach Count	The number of product-specific HEL programs a customer has attended within a given time period. A 1 indicates that the customer has attended one or more HEL programs and a 0 indicates no HEL attendance.	Allows you to monitor whether a customer has attended an HEL program during a specific time period. Measure is useful primarily at Subtotal/Grand Total levels.
Market Met Potential $ (CQ)	The dollarized value of the actual number of prescriptions written for Merck products for a specific market or total portfolio of markets.	Allows you to target the customers that are contributing the most dollars to your business and need to be maintained.
Market Met Potential % (CQ)	Defined as the percent of total Market Potential $ which had been achieved during the current quarter. (Market Met Potential $ (CQ) / Market Potential $ (CQ))	Allows you to target the customers that are contributing the most dollars to your business and need to be maintained.
Market Met Potential % Chg	Defined as a change in a physician's achievement of Market Met Potential $ from the previous quarter to the current quarter. (Merck Met Potential $ (CQ) - Merck Met Potential $ (PQ)) / Merck Met Potential $ (PQ)	Allows you to determine whether promotion should shift from a maintenance to a growth strategy.

Term	Definition	Usage
Market Potential $ (CQ)	A quantitatively derived dollar estimate of each customer's total prescribing volume that can be realistically converted to Merck prescriptions within a specific market.	Allows you to target the customers that realistically have the largest impact on your business.
Market Rx Vol (CM)	The number of prescriptions written within an entire market for the Current Month (CM) by a customer.	Allows you to target customers that write many prescriptions within a specific market.
Market Rx Vol Chg	Market Rx Vol (CM) minus Market Rx Vol (PM).	Allows you to monitor the increase or decrease of the number of prescriptions a customer writes in a specific market from month to month.
Market Rx Vol % Chg	(Market Rx Vol (CM) minus Market Rx Vol (PM)) / Market Rx Vol (CM).	Shows you a percent change of the market volume for a specific customer or group of customers from month to month.
(Market) Rx Vol of Products Displayed (CM)	Creates a custom Market Volume (CM) comprised of the sum of product Rx Volumes (CM) displayed.	Allows you to create custom markets (i.e. Coxib, Bisphosphonate, NNRTI, etc.) in order to more effectively analyze customer performance in specific markets.
Market Un-Met Potential $ (CQ)	The realistic dollarized value of the projected number of prescriptions each physician has the potential to write for Merck products, less what they are currently writing.	Allows you to target the customers that have the highest likelihood for growth.
Market Un-Met Potential % (CQ)	Defined as the percent of total Market Potential $ which had been unachieved during the current quarter. Calculation: (Market Un-Met Potential $ (CQ) / Market Potential $ (CQ))	Allows you to target the customers that have the highest likelihood for growth.

Term	Definition	Usage
Market Un-Met Potential % Chg	Defined as a change in a physician's achievement of Market Un-Met Potential $ from the previous quarter to the current quarter. Calculation: (Merck Un-Met Potential $ (CQ) - Merck Un-Met Potential $ (PQ)) / Merck Un-Met Potential $ (PQ)	Allows you to determine whether promotion should shift from a maintenance to a growth strategy.
Merck Market Rating	The Merck Rating A+/D that is provided in the PlusRxer data.	Permits you to combine Merck Market Rating with the Market dimension to generate a list of Merck Market Ratings across multiple markets.
Merck Rating Count	The number of Merck ratings a specific customer has in a particular market.	Allows you to count the number of customers within a specific subset. Necessary if the Merck Rating Dimension is placed on the y-axis. The measure should be qualified as: Merck Rating Count >= 1
Program Count	The number of product-specific programs a customer attended for a given time period.	Allows you to target customers based upon the number of product-specific programs attended in a specific time period.
Resident Count	The number of calls recorded on residents for a particular hospital within a specific time period.	Allows you to track activity with residents in a specific time period. Designed to be used with the Customer Type dimension set to 'Hospital'.
Rx Breadth	A 1 means that the customer has written at least 1 prescription for a particular product. A zero means they have not written any prescriptions.	Allows you to monitor whether a customer has written a prescription or not for a product. Measure is useful primarily at Subtotal/Grand Total levels.

Term	Definition	Usage
Rx Breadth %	Rx Breadth % equals 100 for a customer with an Rx Breadth of 1. Rx Breadth % for a group of customers is the percentage for that group, which have written at least 1 prescription for the product.	Allows you to monitor the percent of a group of customers (i.e. A+ physicians) that have written a prescription for a product in a specific time period. Measure is useful primarily at Subtotal/Grand Total levels.
Rx Depth (CM)	Rx Depth (CM) equals Rx Vol (CM) for a specific customer.	Allows you to target customers based on the number of actual prescriptions written for a product.
Rx Depth Chg	Rx Depth (CM) minus Rx Depth (PM).	Allows you to monitor the increase or decrease of the number of prescriptions a customer writes for a specific product from month to month.
Rx Depth % Chg	Rx Depth (CM) minus Rx Depth (PM) divided by Rx Depth (CM).	Shows you a percent change of the Rx Depth for a specific customer or group of customers.
Rx Share (CM)	Product Rx Volume (CM) / Market Rx Volume (CM)	Allows you to target customers based on the Rx Share (CM) of a product within a market.
Rx Share of Products Displayed (CM)	Creates a custom Rx Share (CM) calculated using the products displayed within the view. Rx Volume (CM) of product / Sum of Product Rx Volumes (CM) displayed.	Allows you to create custom market shares (i.e. Coxib, Bisphosphonate, NNRTI, etc.) in order to more effectively analyze customer performance in specific markets. Product Strengths impact share calculation.
Rx Share Chg	Rx Share (CM) minus Rx Share (PM).	Allows you to monitor the increase or decrease of the prescription share a customer writes for a specific product from month to month.

Term	Definition	Usage
Rx Share Chg of Products Displayed	Rx Share of Products Displayed (CM) minus Rx Share of Products Displayed (PM).	Allows you to monitor the increase or decrease of the prescription share a customer writes for a specific product within a custom market from month to month.
Rx Vol (CM)	The number of prescriptions written for a specific product for the Current Month (CM) by a customer.	Allows you to target customers based on the number of actual prescriptions written for a product.
Rx Vol Chg	Rx Vol (CM) minus Rx Vol (PM).	Allows you to monitor the increase or decrease of the number of prescriptions a customer writes for a specific product from month to month.
Rx Vol % Chg	Rx Vol (CM) minus Rx Vol (PM) divided by Rx Vol (CM).	Shows you a percent change of the Rx volume for a specific customer or group of customers.
Sample Count	The number of product samples recorded for a particular customer within a specific time period.	Allows you to track sample allocation to targeted customers.
Un-Met Details	The number of unattained product details for a particular customer versus their annual detail targets. Calculation: Annual Detail Targets minus Detail Count = Un-Met Details	Allows you to target customers based upon the number of annual details not attained for a product in a specific time period.

Glossary

Tab Definitions

General Tab

General customer information consists of the customer's name and other basic information depending on the customer's type. You can also add and view hot, shared, and personal notes. Hot notes consist of very important customer information. All representatives who call on the customer should be aware of this information. Clustered representatives in can see each other's hot and shared notes.

Locations

A customer can have more than one office location. The addresses and the designation of the primary address are located in this tab. Also, the business hours associated with the customers locations are located in this tab.

ID's

Identification numbers are codes assigned to customers to uniquely identify them for reasons such as acquiring performance data. The ID's for the customer is located in this tab. A checkmark in front of an ID indicates that Merck has validated it with an internal or external source. You cannot change or delete validated IDs. An ID with a question mark has not been validated and may not be linked in Insight to performance data. An ID with an X is invalid.

Activities

Customer activities consist of calls you make on customers and the programs customers attend. All calls planned and reported for a customer can be quickly viewed from the Activities tab. Calls are listed by date for each call. The call strategy, next call strategy, accomplishments, and notes are listed, if entered previously. You will also be able to review the programs conducted and the customers that attended by reviewing the Programs tab.

Associations

Each customer entered in Insight can have one or more associations with other customers. These associations reflect relationships between customers. These relationships are depicted in the Associations tab.

Flags

Flags group customers by common characteristics so you can quickly view all individuals or organizations by these flags. Flags can be assigned at a global (headquarters) level or at a personal level. The flags assigned to a specific customer will be stored in the flag tab.

Performance

This tab contains all of the performance information that has been captured for a specific customer. This tab includes Plus Prescriber for all of the therapeutic categories that the customer is rated in (this can be viewed by either market share or market volume) and also Merck potential for these categories. The tab also shows the category rating that the customer has in each therapeutic category.

Factoids

Customer Factoids contain demographic information about a customer, by date. They are arranged by category and can be found in this tab.

Formularies

Customer formularies list the Merck and not-Merck products approved or unapproved by a customer for use by its members. Products are listed by therapeutic class for each product, and restrictions and position statements can be provided. The formulary information has been entered by West Point, your National Account Representative, and/or your Hospital representatives. You will only add formularies in this tab if you are responsible for a hospital or account that has a formulary and is not covered by an NAE or hospital representative.

Attachments

Attachments are the files you send to or keep about your customers. These can include WORD documents, Excel spreadsheets, and PowerPoint slides. You can link these attachments to a customer in Insight for tracking purposes. The attachments you have linked will be found in this tab.

Merlin Territory View Descriptions

Analysis Views Folder:

- 01 Market Potential and Share Data by Customer:

  Organizes Customers by Market Category Rating according to Un-Met and Met Potential (CQ), Market Volume (RCQ), Rx Volume, Rx Share and Rx Share Change RCQ vs. RPQ.

  This view is designed to segment customers according to a growth or maintenance strategy. To determine a Customer Growth Strategy sort by Un-Met Potential $ to identify physicians with the most opportunity to contribute new sales. A Customer Maintenance Strategy can be obtained by sorting on Met Potential $ to determine physicians that currently contribute the most to sales dollars. [99.2]

- 02 Product Group A - Rx Volume/Change by Customer:

  This view is designed to display Rx volume and Rx volume change for Group A products by customer.Table View:

  - If Rx volume equals zero the customer has Plus Rxer data for the product's market but no volume for the product.
  - If Rx volume is blank the customer has no Plus Rxer data for the product's market. [99.2]

- 02 Product Group B - Rx Volume/Change by Customer:

  This view is designed to display Rx volume and Rx volume change for Group B products by customer.

  Table View:

  - If Rx volume equals zero the customer has Plus Rxer data for the product's market but no volume for the product.
  - If Rx volume is blank the customer has no Plus Rxer data for the product's market. [99.2]

- 02 Product Group C - Rx Volume/Change by Customer:

  This view is designed to display Rx volume and Rx volume change for Group B products by customer.

  Table View:

  - If Rx volume equals zero the customer has Plus Rxer data for the product's market but no volume for the product.
  - If Rx volume is blank the customer has no Plus Rxer data for the product's market. [99.2]

- 03 Market Potential $ by Payor Type Segment:

  This view is designed to display a customer's Payor Type breakdown into 3rd Party, Cash, Mail, and Medicaid segments relative to Market Potential $ (CQ) and Market Met Potential % (CQ).

  This view provides the flexibility to sort by segment (i.e. highest Merck Potential Cash or Medicaid customers) to provide direction for targeting. For example, high Cash customers in the Lipid Market could be targeted for coupon initiatives. Additionally, customers affected by an NDC lockout against your product could be targeted for their Medicaid segment.[99.2]

- 04 Key Product Share Comparison by Customer:

  Organizes customers by Market Rx volume (RCQ), Rx Volume (RCQ), Rx Share (RCQ,) and Rx Share Change RCQ vs. RPQ.

  This view is designed to rank customers by market volume and provide a comparison of Rx volume and Rx Share data across key products within a particular market. [99.2]

- 05 Key Product Share Comparison by City:

  Organizes Cities by Market volume (RCQ), Rx volume (RCQ), Rx Share (RCQ,) and Rx Share Change RCQ vs. RPQ.

  This view is designed to rank cities by market volume and provide a comparison of Rx volume and Rx share data across key products within a particular market. [99.2]

- 06 Market/Rx Volume and Change by Customer:

  Organizes customers by Market Category Rating according to Market volume (RCQ), Market volume Change RCQ vs. RPQ, Rx Volume (RCQ), and Rx Volume Change RCQ vs. RPQ.

  This view is designed to display New and Total Rx Type volume data by customer. Customers are sorted by New Rx Market volume, highest to lowest. [99.2]

- 07 Breadth & Depth - Reach & Frequency by Customer:

  This view is designed to identify customers that have written at least one prescription (breadth) for a key Merck product in a given market as well as the amount (depth) prescribed by that customer, and shows the volume change RCQ vs. RPQ. This view also identifies customers that have received at least one detail for a given product (reach), the number of product details received by that customer (frequency), and the number of product specific HEL programs attended.

  - Detail % Reach = The % of customers within a given market category rating that have received at least one detail for a product in a given time period.
  - Frequency = Total # of details for a given market category rating divided by the total # of customers within that category rating.
  - HEL Reach % = The % of customers within a given market category rating that have attended at least one product specific HEL program in a given time period. [99.2]

- 08 Calls, Details and HEL Activity:

  This view is designed for all representatives to track activity for key promoted products. [99.2]

- 09 Annual Detail Target Activity by Customer - YTD:

  This view is designed to identify customers within a market that have annual detail targets for a key Merck product. This view will allow users to monitor Market Rx volume (RCQ), Rx volume (RCQ), Rx Share (RCQ), and Rx Share Change RCQ vs. RPQ; as well as YTD global activity progress against annual detail targets. [99.2]

- 10 Physicians Not Detailed by Month:

  This view is designed to monitor promotional "activity and inactivity" by Product Targets, A+..B customers in a specific therapeutic category, or any other flag group by month. Detail data is displayed from October 2000 through March 2001; and sorted on Total Call Count. Only customers with market volume data for a given therapeutic category will be included in this view. [99.2]

- 11 Bubble Graph - Market Rx Volume and Share Data by Customer:

  This view creates a Bubble Graph organizing A+, A, or A- Customers by Market Rx Volume or Market Potential $ according to Rx Volume and Rx Share Change RCQ vs. RPQ. This view is designed to visually segment customers according to a growth or maintenance strategy. [99.2]

Targeting Tools Folder:

- Group A, B, & C Views:

  Designed to be processed and exported to stored formatted Excel spreadsheets. Each folder contains Group-specific views allowing a representative to review their data in a Portfolio snapshot (across all responsible markets) or in one of the Therapeutic sheets.

- Portfolio View:

  These views are designed to display Rx Volume, Rx Share, Rx Volume Change, Mrkt Rx Vol (RCQ), Cluster YTD Details for the Group's promoted markets. [99.2]

- Therapeutic View:

  Organizes customers by Cluster YTD Details, Market Un-Met %, Market Rx Volume (RCQ), % of Mrkt Total, Market Rank, Rx Volume (RCQ), Rx Share (RCQ,) and Rx Share Change RCQ vs. RPQ. These views are designed to rank customers by market volume and provide a comparison of Rx Volume and Rx Share data across key products within the market. [99.2]

- COX II Market:

  Rx Share of Products Displayed:

  This view calculates the market share for VIOXX and Celebrex within the COX II market. Customers are sorted by a "custom" market volume (highest to lowest) which is determined by the products displayed in the view. [99.2]

Lead Representative Roles & Responsibilities

Lead Representative

Roles and Responsibility

Notes

Lead Representative

Purpose

The Lead Representative role evolved as a means for the cluster to ensure execution excellence and to integrate activities with Specialty and Hospital Representatives and HSAs.

Notes

Lead Representative

Role and Responsibilities

- Maintains ongoing lead product situation analysis for cluster
- Assesses and maintains product strategy within the Account Plans
- Guides planning and oversight for cluster attainment of reach and frequency as well a breadth and depth goals
- Coordinates and communicates product, disease, market and competitive issues within a cluster
- Serves as a point of integration for Specialty and Hospital Representatives and HSAs
- Identifies cluster/district resource and training needs
- Drives HEL planning and control; accountable for quality of effort
- Leads all product-specific special projects (i.e. Goal to Control, VIP, special target audiences, etc.)

Notes

Lead Representative
Role Differentiation

- **Lead Representative**
  - Administrative role to coordinate execution excellence regarding a strategic product within the cluster and to integrate activities with Specialty and Hospital Representatives and HSAs.
- **Specialty Representative**
  - Defined position to support marketing strategies of a key strategic product by focusing on key Specialty Audiences. Lead the implementation of specific Marketing Programs, i.e. HCP, TSP. Focuses on defined target audience and unique resources. Role includes enhanced product, disease and market knowledge.
  - **HSA**
  - Defined position to identify and contact National Thought Leaders, with the primary objective of developing National Advocates and Speakers to support Merck products. Receive intensive initial and ongoing training within a defined therapeutic area. Operate under Policies 110 and 130.

Notes

The Point

To ensure all Lead Representatives:

- Apply a consistent, integrated approach to conducting a product situational analysis
- Can determine the appropriate tactical plan based on that analysis
- Can communicate those resultant tactics to their clustermates

Notes

Lead Representative Training Objectives

Apply a consistent, integrated approach to analyzing lead product

- What are the key performance indicators?
- What is this data telling me?
- What actions does the team need to take in light of this information?
- How am I going to communicate these actions to the rest of the team?
- How will I track progress to ensure the desired result?

Notes