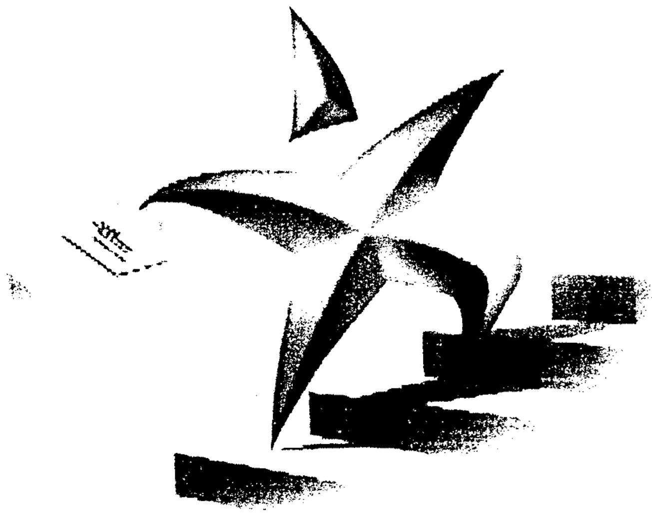
Specialty Foundations



Course Completion Guide

Specialty Representative
Advocate Development
Foundations

Ver. 06/2001

Compliance Instruction

You are reminded that all of your activities must comply with all applicable Policy Letters and Corporate Policies. Although many such policies apply to your activities in this training course, Policy Letters 110 and 118 are of particular relevance.

You are further reminded that anyone who violates any Policy Letter is subject to immediate disciplinary action up to and including termination.

Advocate Development

Instructions

Use this course completion guide to review the required documents from each representative so you can "sign-off" for approval.

Requirements

1. Introduction & Self-Assessment
2. What's My Role?
3. Share Advocate Action Plan with Manager

Requirement #1: Introduction Self-Assessment Answer Key

Representatives should complete the Self-Assessment. Suggested answers are provided below:

- What is the standard definition of a thought leader?
  - A thought leader, as defined by the market, has several characteristics:
    - Customers who, due to their ability to influence their peers, drive therapeutic business at the national, regional or local level.
    - These individuals may not necessarily be a top prescriber. However, their decisions and influence will impact the prescribing habits of others.
    - They may or may not be in alignment with Merck's clinical and business positions.
- How does Merck define an advocate?
  - An advocate (as defined by Merck) is an individual who is a thought leader AND is very familiar with the prescribing information for the Merck product(s) and understands and supports the medically/legally approved materials available for the product(s). An advocate can, influence colleagues through peer-to-peer relationships, hold beliefs that are congruent with the approved labeling and indications for the use of the Merck product(s) in the appropriate patient indications, and be a speaker.
- Which factors should you look at to gain an understanding of the thought leaders in your territory?
  - To gain an understanding of the thought leader's in your territory you should understand their:
    - Beliefs and behaviors
    - Needs
    - Approaches to patient management
    - Sphere of influence
- What are the three spheres of influence (and their definitions) that a thought leader can have?
  - Local Thought Leaders: Also called community thought leaders. These people are well respected and have influence within their immediate area, such as a city or a portion of a state. Typically, a local thought leader influences physicians at the primary care level and their immediate peer group of specialists.

- Regional Thought Leaders: These people are well respected and have influence over a larger geographic region than do local thought leaders. For example, a regional thought leader might have influence over an entire state or even several states. Typically, a regional thought leader influences physicians at the level of specialists and primary care physicians.
- National Thought Leaders: These people are well respected and have influence nationally. National thought leaders are usually seen as top thought leaders in their field of expertise and may even be driving the treatment approaches and methods on a national level. Typically, a national thought leader influences physicians at all levels across the nation.

■ What are some of the resources you can use to gain access to the thought leader's in your territory?

- Internal Resources
- Office Based Representatives (OBR)
- Business Manager
- Other Specialty Representatives in your Territory
- Marketing Team/Merck Research Laboratories (MRL) Contacts
- Health Education Liaison (HEL) Programs
- External Resources
- Thought Leader's Peers
- Thought Leader's Office Personnel

■ What are some of the techniques you can use to gain access to thought leaders?

- Be prepared for your appointment (i.e., do your homework).
- Obtain a referral from the previous Specialty Representative.
- Be knowledgeable about the physician's history in the marketplace.
- Speak to the thought leader's desire to focus on their needs.
- Schedule time with the thought leaders.

- What are the 5 levels of advocate status as defined on the Advocate Development Continuum?
  - Low Advocate Status:
    - Advocate Level 1 is a physician who:
      - Is a critical driver of business
      - May be an advocate for the competition
    - Advocate Level 2 is a physician who believes in use of Drug Class, but does not distinguish between products in class.
  - Medium Advocate Status:
    - Advocate Level 3 is a physician who believes in use of Drug Class, does distinguish between products in class and supports some scientific issues (approximately 1-2).
    - Advocate Level 4 is a physician who believes in use of Drug Class, does distinguish between products in class, is qualified on multiple scientific issues (>2) and is familiar and current with prescribing information for Merck product.
  - High Advocate Status: Advocate Level 5 is a physician who believes in use of Drug Class, does distinguish between products in class, is qualified on all scientific issues and is very familiar and current with prescribing information for Merck product.

Requirement #2: What's My Role?

Specialists should work with their Business Manager to complete the 'What's My Role in Advocate Development?' worksheet. Business Managers should review the worksheet for the following information:

- Specialist's MBOs relative to advocate development.
- Importance of the management of advocate development to the attainment of the Specialist's business objectives.
- Specialist's peers who are best suited to assist in developing advocates.
- Advocate management strategy and message advocates should communicate.
- Current thinking in the thought leader arena regarding the disease process and medication for Specialist's therapeutic area.
- Identification of thought leaders who are positively or negatively aligned with Merck in relation to Specialist's therapeutic area.

Requirement #3: Share Advocate Action with Manager

Specialists should complete the Advocate Action Plan by identifying 3-5 top thought leader advocates in their territory. Business Managers should review the Plan for the following information:

- Thought leaders advocates' beliefs and behaviors, needs, approaches to patient management and sphere of influence and speaker qualifications.
- Strategy for gaining access to the thought leader advocates identified in the plan.
- Resources the Specialist can use to assist them in gaining access to the thought leader advocates.
- Strategy for managing the thought leader advocates identified in the plan.
- Suggestions for improvements to the Advocate Action Plan.

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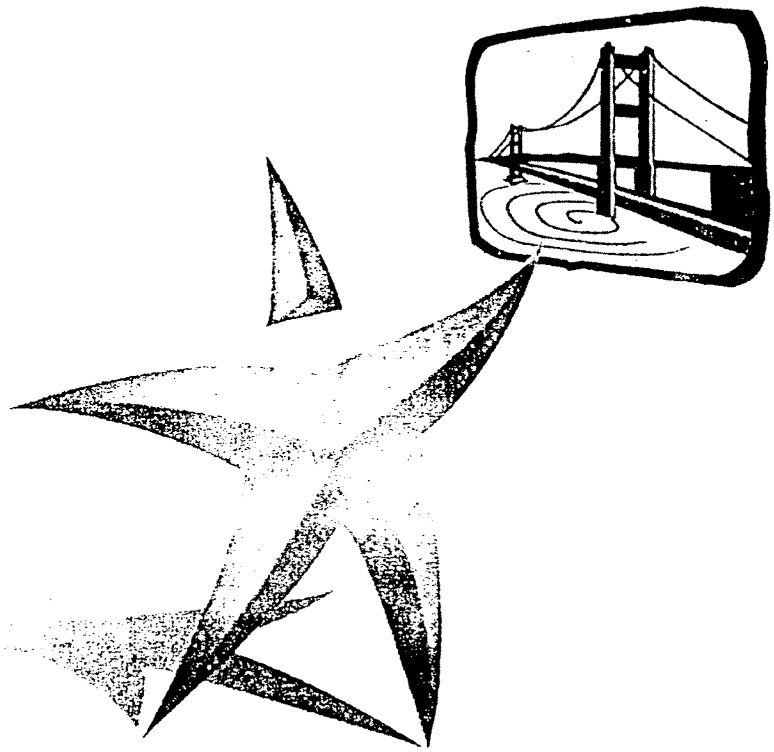
*** Slip Sheet ***

Document

Specialty Foundations



Participant Self-Study Workbook

Specialty Representative
Advocate Development
Foundations

Ver. 5/2001

SPECIALTY FOUNDATIONS

Introduction

Self-paced Reading

Time: 5 minutes

OVERVIEW

The purpose of this self-paced course is to provide you with the skills required to gain access to and manage existing advocates in your territory.

The course will benefit you twofold:

- This course will provide you with the skills and knowledge you need to gain access to and manage the advocates in your territory,
- And you will also have the opportunity to develop an Advocate Action Plan that you can then implement in your territory.

In addition to using these skills on the job in order to understand how to better manage and access advocates, you will also have the opportunity to hone these skills, refine your Advocate Action Plan and share your strategies with colleagues in the Advocate Development session of the Foundations Workshop.

You will be contacted by Sales Training and Professional Development to set up a formal Q&A session with a trainer regarding the content discussed in this self-paced course. Should you have questions regarding your responses to the self-assessment or any of the readings or activities in this workbook, those issues will be addressed during this session.

OBJECTIVES

At the completion of this course, you will be able to:

- Determine your role in advocate development.
- Describe techniques for gaining access to thought leaders.
- Determine a thought leader's sphere of influence.
- Explain the objectives for a Specialist related to the management of advocates.

PACING

Although the entire course should take approximately 3-3½ hours to complete, you will probably not be able to complete it in a single session, nor should you. Pace yourself by fully understanding and completing one topic at a time. Finally, be sure to keep your completed Worksheets and Advocate Action Plan and bring them with you to the Instructor-Led Workshop.

OUTLINE

The following provides a brief outline of the topics covered in the course, the content to be addressed, the activities you will complete, and the reading material and other resources you will use. Consult with your Business Manager or Trainer if you need additional information or feedback on the activities included in the course. Finally, as part of the activities in this course you will develop a Advocate Action Plan. Please be sure to bring this Action Plan with you to the Foundations Workshop, as it will be applicable in the Advocate Development session. You will receive an invitation for the Foundations Workshop from the Sales Training and Professional Development Department at a later time.

- Primary reading material, examples, case study information, job aids and worksheets are provided in this Workbook.
- In order to make the course as relevant as possible, many of the activities require you to obtain and use "real world" data; specific instructions will be provided for all such activities.
- There is a check box next to each reading and activity. This is to allow you to track your progress as you advance through this Workbook. When you complete a reading and/or an activity, place a checkmark in the box provided.
- Be sure to complete all the activities. Specific instructions will be provided.

	Content Summary	Resources
Course Introduction	Self-assessment questions: • Assess proficiency in the Advocate Development topics covered in this course • Focus your learning	<u>Reading</u> ☐ Introduction <u>Activity #1</u> ☐ Self-Assessment Questions
Pathway to Success	• Importance of Advocate Action Plan • Key Components of a Plan	<u>Reading</u> ☐ Introduction ☐ Why is an Advocate Action Plan Important? ☐ What are the Key Components of an Advocate Action Plan? ☐ What are the Next Steps?

SPECIALTY FOUNDATIONS

	Content Summary	Resources
What is My Role?	Understanding of Specialty Representatives roles and responsibilities with regard to advocate development. To support your understanding of your role in advocate development, you will be asked to work with your Business Manager to clearly define your roles and responsibilities.	<u>Reading</u> ☐ Introduction ☐ Definition of a Thought Leader ☐ Definition of an Advocate <u>Activity #2</u> ☐ Defining Your Role In Advocate Development
Understanding Thought Leaders	Understanding the drivers effecting thought leaders': • Beliefs and behaviors, • Needs, • Approaches to Patient Management, • And Sphere of Influence. To support your understanding of these topics, you will be asked to identify several top thought leaders in your territory and identify their key drivers.	<u>Reading</u> ☐ Introduction ☐ Understanding Thought Leaders' Beliefs and Behaviors ☐ Understanding Thought Leaders' Needs ☐ Understanding Thought Leaders' Approaches to Patient Management ☐ Understanding Thought Leaders' Sphere of Influence ☐ Summary <u>Activity #3</u> ☐ Understanding Thought Leaders
Gaining Access to Thought Leaders	Techniques and Resources to assist you in gaining access to thought leaders. To support your understanding of this topic, you will be asked to develop an access strategy for the thought leaders you identified in the previous activity.	<u>Reading</u> ☐ Introduction ☐ Resources to Assist In Gaining Access to Thought Leaders ☐ Techniques for Gaining Access to Thought Leaders <u>Activity #4</u> ☐ Thought Leader Access Strategy

	Content Summary	Resources
Managing Current Advocates	Understanding the status levels of advocates speakers and how to best manage them by identifying needs and selecting the most appropriate advocate to fill the need. To support your understanding of these topics, you will be asked to develop an advocate management strategy for several key advocates in your territory.	<u>Reading</u> ☐ Introduction ☐ Level of Advocates ☐ Criteria to Assess Qualified Speakers ☐ Techniques for Managing Advocates <u>Activity #5</u> ☐ Advocate Management Strategy •
Conclusion	In this section, you will be asked to share the results of your previous activities with your Business Manager, to gain his/her feedback.	<u>Reading</u> ☐ Next Steps <u>Activity #6</u> ☐ Share Advocate Action Plan with Business Manager

Self-assessment

Activity #1

Time: 10 minutes

INTRODUCTION

The following self-assessment is intended to help you to better focus your learning efforts on the topics that will be most beneficial.

- Answer each question to the best of your ability without reference to reading or other sources of information.
  - Use the space provided or use an additional sheet of paper if you need more space.
- In order to be prepared for the Advocate Development session of the Foundations Workshop, use your current knowledge to complete the activities for the topics on which you have "tested out."

Question #1 What is the standard definition of a thought leader?

Question #2 How does Merck define an advocate?

SPECIALTY FOUNDATIONS

Question #3 Which factors should you look at to gain an understanding of the thought leaders in your territory?

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Question #4 What are the three spheres of influence (and their definitions) that a thought leader can have?

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Question #5 What are some of the resources you can use to gain access to the thought leader's in your territory?

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Question #6 What are some of the techniques you can use to gain access to thought leaders?

Question #7 What are the 5 levels of advocate status as defined on the Advocate Development Continuum?

Question #8 When conducting a national symposium on epidemiology, what status level of advocate would you use? What sphere of influence should he/she have?

Pathway to Success

Self-paced Reading

Time: 5 minutes

INTRODUCTION

Throughout this course, you will learn and practice the skills necessary to gain access and manage the advocates currently in your territory. One of the tools you can develop to help you better manage advocates is the Advocate Action Plan.

This course will walk you through the steps necessary to create an Advocate Action Plan that you can begin implementing right away.

WHY IS AN ADVOCATE ACTION PLAN IMPORTANT?

An Advocate Action Plan provides you with a framework to follow on territory. It is a document you can share with your Business Manager to ensure that you are managing advocates and thought leaders in the most beneficial way for your territory. Your Advocate Action Plan is a valuable tool to assist you in focusing your efforts on territory and make good business decisions about how to best manage your advocates and thought leaders.

You should review and adjust your plan on a regular basis to ensure that you are meeting your territory goals, the needs of your colleagues and of the thought leaders in your territory.

WHAT ARE THE COMPONENTS OF AN ADVOCATE ACTION PLAN?

While there is no one right way to create an Advocate Action Plan, there are several components that are essential to developing a complete and well thought out plan. This course will focus on the aspects of a Advocate Action Plan that are critical to successfully implementing the plan in your territory with all Merck advocates, including thought leader advocates':

- Beliefs and Behaviors
- Needs
- Approaches to Patient Management
- Sphere of Influence
- Advocate status level and
- Speaker qualifications (if applicable)

By developing an Advocate Action Plan, you can ensure that you are properly managing Merck advocates in your territory. That is to say that you are matching an advocate's unique skills and knowledge to the situation that requires this knowledge.

Each of the key components of an Advocate Action Plan will be discussed in more detail throughout this course. For now, let's look at each of these components at a high-level.

WHAT ARE THE NEXT STEPS?

To begin developing your Advocate Action Plan, you will first want to begin by defining your role as a Specialty Representative in advocate development. To do this you will want to read the following section of this document entitled: What's My Role?

What's My Role?

Activity #2

Time: 30 minutes

INTRODUCTION

Before you can effectively create an Advocate Action Plan, you must first understand your role in Advocate Development. This role will be different for every Specialty Representative and is defined by several factors:

- Your Franchise Business Group (FBG) and sales management
- Your territory

However, in general your role is to sell through the science, by combining scientific data and marketing to create meaningful messaging. This means you should utilize the available approved scientific resources to support and reinforce the key marketing messages as defined by your FBG. Keep in mind there should be an overriding goal to all your interactions with advocates, which is to increase the overall success of the Merck product relative to its use in the appropriate patients for the approved indications.

DEFINING KEY TERMS

Before completing this exercise, there are two terms that you should be familiar with. It is important for you to understand the definitions of a thought leader and an advocate. These terms are as described below and they will help you complete the following activity and throughout the rest of this course.

Definition of a Thought Leader

A thought leader, as defined by the market, has several characteristics:

- Customers who, due to their perceived status within the medical community, influence their peers and thus, drive therapeutic decision-making at the national, regional or local level.
- These individuals may not necessarily be top prescribers. However, their decisions and influence will impact the prescribing habits of others.
- They may or may not be in alignment with Merck's clinical and business positions.

Definition of an Advocate

An advocate (as defined by Merck) is an individual who is a thought leader AND is very familiar with the prescribing information for the Merck product(s) and understands and supports the medically/legally approved materials available for the product(s). An advocate can:

- Influence colleagues through peer-to-peer relationships.
- Hold beliefs that are congruent with the approved labeling and indications for the use of the Merck product(s) in the appropriate patient indications.
- Be a speaker.

As we move forward in this module, it is important to note that when we refer to thought leaders, we are including advocates in that discussion. The reverse is not necessarily true.

ACTIVITY: DEFINING YOUR ROLE IN ADVOCATE DEVELOPMENT

To determine your role in advocate development, you should meet with your Business Manager to discuss your roles and responsibilities by answering the questions on the following worksheet with regard to your role in advocate development within your therapeutic business area.

WORKSHEET: WHAT'S MY ROLE IN ADVOCATE DEVELOPMENT

Work with your Business Manager or Mentor to answer the following questions regarding your role in advocate development.

Question 1 What are your MBOs relative to advocate development?

Question 2 How important is the management of advocate development to the attainment of your business objectives?

Question 3 Are there HSAs (Health Science Associate) involved in the advocate development process with your therapeutic area?

If so, what are the HSA's responsibilities with regard to advocate development vs. your responsibilities?

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Question 4 Which of your peers are best suited to assist you in developing advocates?

Question 5 How will advocates be managed (speaking, clinical experience,) in your territory? What are they looking for an advocate to communicate?

Question 6 What is the current thinking in the thought leader arena regarding the disease process and medication for your therapeutic area?

Question 7 Which thought leaders are positively or negatively aligned with Merck in relation to your therapeutic area?

Understanding Thought Leaders

Self-Paced Reading

Time: 20 minutes

INTRODUCTION

Now that you understand your roles and responsibilities in developing advocates, you're ready to focus on how to gain an understanding of the key drivers of the thought leaders in your territory. Gaining an understanding of the thought leaders in your territory will improve your ability to interact with a wider range of customers and provide you with insight into the issues and concerns facing them.

UNDERSTANDING THOUGHT LEADERS' BELIEFS AND BEHAVIORS

Thought leaders are valuable resources to you. They impact the clinical and business decision making involved in the delivery of health care by what they say and do. To properly support and manage these valuable resources, it is important that you understand their underlying drivers; in other words, what makes them tick. This will enable you to forge stronger and deeper relationships with the thought leaders in your territory.

Thought leaders' beliefs and behaviors can be shaped by many different factors:

- Clinical Experience
  - Thought leaders may have shaped their beliefs and behaviors based on their own clinical experience. Their clinical experience is often the foundation of their thinking and subsequent research endeavors.
- Other Thought Leaders
  - Thought leaders may be influenced by other thought leaders. Typically a local thought leader is influenced by a regional or national thought leader, and a regional thought leader is influenced by a thought leader at the national level. National thought leaders can be influenced by other national or even international thought leaders.
- Published Research
  - Many thought leaders are influenced by published research. These physicians may not place much validity in the information you provide them until they have read peer review journals that support the same conclusions.
- Peers
  - Thought leaders can also be influenced by their colleagues. These physicians may closely follow what the peers in their community or their practice partners say and do. These physicians may follow their community's popular conscience in their treatment beliefs.
- Societal Factors
  - Social factors can also have a strong influence on a thought leader's beliefs and behaviors. There are many societal factors that can influence

a thought leader, such as:

→ Politics – A thought leader's beliefs and behaviors may be influenced by current events in government. For example, attempts at health care reform during the Clinton administration stirred much interest in the role of economics and managed care in the delivery of health care. Subsequently, the inclusion of outcomes data relative to cost became an important research endpoint.

→ Hospital Policies – The policies of the hospital a thought leader is associated with can influence his/her beliefs and behaviors. For example, a thought leader may be more likely to engage in patient education initiatives because the hospital requires the clinician to do so.

→ Education – A thought leader's educational training will play a role in shaping their beliefs and behaviors. Medical schools have different approaches to patient management, and this is often reflected in the thought leader's approach to managing his/her patients.

→ Medical Training – A thought leader's mentors during residency can have a huge impact on his/her beliefs and behaviors. The beliefs and behaviors of the mentor are often reflected in those of the thought leader. In addition, the thought leader may look to the mentor for guidance throughout their career.

→ Personal Bias – Thought leaders are also human. This means that they bring personal beliefs and bias to their work. A thought leader may be influenced by social considerations, monetary concerns or other personal factors. Either they or a family member might have the condition they specialize in treating.

Most likely, a thought leader is influenced by more than one of the factors discussed above. In order to truly understand what influences each of the thought leaders in your territory, you need to build a solid relationship with that thought leader and determine his/her individual beliefs and behaviors.

Determining Thought Leaders' Beliefs and Behaviors

Now that you are beginning to understand that there are many potential drivers of thought leaders' beliefs and behaviors, it is important that you know what "clues" to look for in your thought leaders' to determine what factor(s) influence them. There are many different approaches you can use to determine your thought leaders' beliefs and behaviors. For example, you can ask them questions regarding their beliefs:

- How did you develop your interest in the disease?
- What publications do you read regarding the disease?
- What influences your treatment decisions?
- What other physicians do you work with?
- How were you trained (surgical vs. family practice vs. DO)?
- Where did you train?

- Who do you consider to be the experts in this field?

In addition to asking the physician such open-ended questions, you may want to obtain information regarding the physician such as:

- What types of meetings do you like to attend? A physician who attends large national meetings to obtain continuing medical education may have a stronger academic interest in disease management vs. a physician who uses mail correspondence courses. The latter physician is probably more interested in remaining clinically competent vs. understanding all the facets of the current research relative to the disease.
- Do you serve on any committees in the hospital?
- What types of publications does the physician have in his/her private office?
- Are you affiliated with a teaching hospital vs. a community hospital?
- Do you have a clinical appointment vs. research appointment?
- Do you teach?
- Do you have residents doing rotations in your setting?
- Are you a department chair?
- What does the information provided on the Curriculum Vittae (CV) tell you about the physician?
  - Where and how extensively are they published?
  - Who is the co-author(s) in their publications?

Much of this information can be obtained from the physicians CV or by asking their colleagues or office staff.

Remember, direct questioning of the physician is not the only way to gain information about him/her. For example, the style and ambiance of the physician's waiting room can also be used as a clue to their beliefs and behaviors. You might deduce that a dermatologist with a "spa like" waiting room is more interested in cosmetic procedures than a dermatologist that has a more conventional waiting room. The style and ambiance of the waiting room should not be used as a sole indicator of a thought leader's beliefs and behaviors, and it should always be confirmed by more concrete data. But this information can assist in deciding what types of questions to ask the thought leader to gain insight into his/her beliefs and behaviors.

UNDERSTANDING THOUGHT LEADERS' NEEDS

Understanding a thought leader's beliefs and behaviors is only one factor to consider when building a relationship. It is also important to understand a thought leader's needs. By understanding his/her needs, you can build stronger relationships with the thought leader. A thought leader has many different needs, such as:

- Business Needs – Physicians often have many business needs that they must satisfy in order to be successful, such as:
  - Utilizing computers to track outcomes data for patients,

  - Filing for reimbursement,
  - Obtaining funding for research,
  - Training for their staff,
  - And marketing and advertising their services.
- Academic Needs – Thought leaders may also have a strong need to stay abreast of the latest scientific information regarding specific diseases.
- Clinical Needs –It can be important to some thought leaders to remain current on the changing approaches to disease management. These changes may impact the types of treatment they prescribe, the equipment they invest in for their practice as well as the staff them might need to recruit and train. In addition, the physician may have clinical practice guidelines imposed by MCOs and/or hospitals.
- Personal Needs – Thought leaders also have personal needs that they must satisfy, such as:
  - Networking within their professional community and within their patient population,
  - Developing their speaking skills and finding opportunities to speak.
  - Having a forum to receive feedback from peers
  - Serving on committees
  - Teaching
  - Publishing articles

As with understanding a thought leader's beliefs and behaviors, it is important to keep in mind that he/she may have many of the needs discussed above. In order to improve and strengthen your relationship, you need to understand which needs are driving their behavior. For example, by helping an advocate develop his/her presentation skills he/she will benefit by having an opportunity to network with his/her colleagues during the presentations. You will benefit from this by ensuring that you provide the highest quality speaker presentations to your customers.

Determining Thought Leaders' Needs

Now that you understand some of the needs of your thought leaders, it is important that you know what "clues" to look for in your thought leaders to determine what factors influence them. To determine a thought leader's needs, you might ask any of the following questions:

- How do you currently treat the disease?
- What is your current clinical approach to the disease? How do you make those decisions?
- How do you get your information to make treatment decisions?
- Do you track patient outcomes?
- How effective is your tracking of patients relative to follow up visits?
- Would you like to attract a different type of patient?
- Where do you see yourself and your practice in 2-5 years?
- What are your immediate and long-term goals?

In addition to asking the physician the above questions, you may want to consider the following:

- What is the thought leader's reaction to your presentation of information? What resources does he/she react best to: approved sales aides or approved literature (reprints)? Do they show interest in understanding the clinical data you provide or, do they refute the data suggesting that clinical experience is more relevant? Reactions are indicators of preferences and needs. Further exploration of the thought leader's reactions will help you determine their needs over time.

Understanding a thought leader's needs will assist you in developing a strong relationship with him/her and it will enable you to properly manage that advocate to create win-win situations for both Merck and the thought leader.

UNDERSTANDING THOUGHT LEADERS' APPROACHES TO PATIENT MANAGEMENT

A number of factors can influence a physician's choice with regard to patient management. Their decisions, although based on objective data, are subjective in that they are the result of how that physician chooses to interpret the data and integrate it into his/her practice. It may be based on:

- His/Her own clinical experiences,
- Other physicians' opinions
- Patient desires
- Clinical research studies
- And/or messages from competitors.

As you are building a relationship with the thought leaders in your territory, it is important that you take into consideration their approach to patient management when looking at the factors that drive their behaviors.

Determining Thought Leaders' Approaches to Patient Management

In order to determine a thought leader's approach to patient management, you might ask the physician questions such as:

- What influences your decisions when selecting a therapy?
- What motivates you to prescribe a particular class of products?
- In what situations do you not prescribe the Merck product?
- What information do you need to make treatment decisions?
- How do you track patient outcomes?

- In addition to asking the physician the above questions, you may want to consider the following:
  - The managed care environment in which the physician practices.
  - Possible influences from other companies that have treatment options relative to the disease.
  - Treatment options that were current when the physician was in training.

Understanding the "why" behind a physician's prescribing behaviors can assist you in crafting your message to the thought leader and ensuring that you properly manage that advocate based on their approach to patient management.

UNDERSTANDING THOUGHT LEADERS' SPHERE OF INFLUENCE

Once you understand the factors driving a thought leader's beliefs, behaviors, needs and patient management approaches, you'll want to determine their sphere of influence.

Thought leaders have varying degrees of influence over other physicians. These spheres of influence can be used to help you determine how to best manage a thought leader. There are three different classifications of thought leaders. This classification is based upon their sphere of influence:

Local Thought Leaders

- Also called community thought leaders. These people are well respected and have influence within their immediate area, such as a city or a portion of a state. Typically, a local thought leader influences physicians at the primary care level and their immediate peer group of specialists.
- For example, Dr. Smith is Chief of Medicine at Summertown Community Hospital; he has run an extremely busy practice in the area for 15 years and has served on various committees within the hospital as well as the County Medical Association. Dr. Smith is also a well-known member of the medical community. He has an appointment at the State University Medical School and routinely serves as a clinical site for medical students.

Regional Thought Leaders

- These people are well respected and have influence over a larger geographic region than do local thought leaders. For example, a regional thought leader might have influence over an entire state or even several states. Typically, a regional thought leader influences physicians at the level of specialists and primary care physicians.
- For example, Dr. Patel is Chief of Neurology at the State University Medical Hospital. In addition to her academic appointment, Dr. Patel sees a large base of private patients. Dr. Patel has participated in several clinical trials for pharmaceutical companies and she has been published in peer review journals on the topic of migraine. Dr. Patel also serves as a clinical preceptor for on-going education of family physicians in a variety of neurological areas including migraine.

National Thought Leaders

- These people are well respected and have influence nationally. National thought leaders are usually seen as top thought leaders in their field of expertise and may even be driving the treatment approaches and methods on a national level. Typically, a national thought leader influences physicians at all levels across the nation.

- For example, Dr. Guru is a faculty member at Harvard Medical School. He is currently serving on the board of the American Medical Association and he belongs to several professional associations and has served in various leadership positions with in those associations. Dr. Guru is the editor of Headache and serves as a reviewer for several publications. His extensive clinical and academic research (primarily in the area of migraine) is well respected by his peers.

Determining Thought leaders Sphere of Influence

As you are building a relationship with the thought leaders in your territory and gaining an understanding of their key drivers, you'll also want to determine their sphere of influence. Of course, before you can determine a thought leader's sphere of influence, you must first determine if he/she is a thought leader. The following techniques can be used to assist you in identifying thought leaders.

- Looking at call records from the previous Specialty Representative
- Review call history information and targeting lists in Insight
- Talk with other Merck colleagues, such as your:
  - Business Manager,
  - Mentor,
  - Or cluster overlay representatives (OBRs, HSA, other Specialty Representatives, etc.).

In addition, you can also consult with the MIT and/or your FBG contacts.

Before you begin the activity, you should also review the definitions for a thought leader and an advocate, provided below.

The following techniques can be used to assist you in determining their sphere of influence of your thought leader:

- Obtain the thought leader's CV to see where they are in their development:
  - Where have they been speaking, publishing and researching?
  - Are they academically oriented? Where were they educated and trained?
  - Are they editors or reviewer for a peer reviewed journal?
  - What are their professional affiliations?
- Visit with the physician and engage in open dialogue regarding their activities and how they view themselves,
- Listen to hear what other physicians have to say about your thought leaders.

SUMMARY

In this section of the workbook, we have focused on how to understand the key factors that influence a thought leader. The information you gather about the thought leader's beliefs, behaviors, needs, approaches to patient management and sphere of influence can help you:

- Determine how to interact with the thought leader.
- Determine what activities the thought leader is best suited.
- How to best manage him/her based on this information (in terms of their

activities and schedules).

Now you will have the opportunity to identify the top thought leader advocates in your territory and determine the key factors that influence them. Once you have completed this activity, you will then focus on how to access the thought leader advocates and on how to best manage the advocate based on their unique skills and needs.

Understanding Thought Leaders

Activity #3

Time: 30 minutes

ACTIVITY: UNDERSTANDING THOUGHT LEADERS

Now that you know the key factors that influence a thought leader, it's time to identify the 3-5 **top** thought leader advocates in your territory and determine their:

- Beliefs and behaviors
- Needs
- Approach to patient management
- Sphere of influence

Later in this course, you will be asked to develop a strategy to gain access to these thought leader advocates based on the work you complete in this activity.

To accomplish these tasks, you will need to complete columns 1-4 in your Advocate Action Plan located on page 34, 36, 38, 40 and 42 by:

1. Identifying the 3-5 top thought leader advocates in your territory
2. Determining each thought leader advocate's:
   - Beliefs and behaviors
   - Needs
   - Approach to patient management
   - Sphere of influence (including identifying specific physicians that the thought leader advocate influences)

Gaining Access to Thought Leaders

Self-Paced Reading

Time: 15 minutes

INTRODUCTION

Everything you have learned thus far in this workbook can be used to assist you in understanding the motivations and key drivers of thought leaders and can be used to build strong relationships with your thought leaders. This section of the workbook will focus on the resources and techniques that you can use to gain access to your thought leaders.

RESOURCES TO ASSIST IN ACCESSING THOUGHT LEADERS

There are many resources available to assist you in accessing thought leaders. These resources are both internal and external to Merck. Some of the most valuable and knowledgeable resources are:

Merck Internal Resources

- Office Based Representatives (OBR)
  - If you are new to your territory, your Office Based Representatives who call on a thought leader in your territory may have a better/stronger relationship with them than you do. Therefore, the OBR may be able to provide you with valuable insight to help you understand the thought leader and gain access to that individual. In addition, they may know the "workings" of the geographic area more intimately than you do. For example, they may know that Tuesday's are grand rounds and you may be able to access the physician at the hospital at that time.
- Your Business Manager
  - Your Business Manager may have a relationship with the thought leader that will allow you to gain access to him/her. If your Business Manager does have a relationship with the thought leader he/she may be able to provide you with support during a field visit.
- Other Specialty Representatives in Territory
  - Other Specialty Representatives can often provide you with support and insight into some of the thought leaders in your territory. In addition, they can assist you in developing strategies for understanding and gaining access to the thought leaders.
- Marketing Team/Merck Research Laboratories (MRL) and MEDSA Contacts
  - These people can work directly with your thought leader when appropriate. As extended team members, they are resources that can help you add value to and thus, strengthen your relationship and access to your thought leaders. They may explore opportunities of further research or answer questions relative to clinical and marketing issues beyond your scope of expertise.
- Health Education Liaison (HEL) Programs

  - HEL programs, such as roundtables or tutorials are an excellent way to gain access and build a relationship with a thought leader by providing a forum for interaction.
- Studies
  - Thought leaders can participate in studies as a clinical site investigator in an ongoing study of a product or disease. In addition, they can apply for medical school education grants.
- Consultants Meetings
  - These meetings are hosted by the marketing Team. They are typically a combination of scientific data presentations and market research information. Physicians attend, listen to and evaluate the presentation to help the FBG refine the information presented. These meetings can help you add value and build a stronger relationship with thought leaders.
- Strategic Advisory Board
  - This board consists of a few physicians that are a high-level thought leaders within their field of expertise. They then give us guidance on how to best utilize and position a product from a medical and marketing perspective that is consist with approved labeling. They also provide guidance on new developments from the disease and patient management perspective. A position on this board is viewed as an honor and thus can help you improve your relationship with your thought leaders.

External Resources

- Thought Leader's Peers
  - Peers of the thought leader can be an excellent way to gain access to a physician. They can provide you with useful information about the thought leader and even facilitate an introduction. This affiliation can provide you with instant credibility in the eyes of the thought leader.
- Thought Leader's Office Personnel
  - Office personnel can be valuable sources of information regarding the thought leader's hours of availability and preferences. In addition, the office personnel may be able to provide you with insight into value added information or services you can provide to the physician.
- Continuing Medical Education (CME) Initiatives
  - Every physician is required to obtain CME credits. Often Merck will provide unrestricted educational grants to CME providers for the development of an education program on a specific disease. These courses can provide valuable information to your thought leaders or your thought leader may be asked, by the provider, to assist in the development of the course.

TECHNIQUES FOR GAINING ACCESS TO THOUGHT

To gain access to a thought leader, you can employ any one or more of the following techniques:

- Be prepared for your appointment (i.e., do your homework). Before meeting

LEADERS

with a thought leader, you should be sure that you are well versed on Merck's data.

- Obtain a referral from the previous Specialty Representative. This can be done via a written letter of introduction or better yet a personal introduction. You might also suggest the previous Specialty Representative request an appointment for you to visit with the thought leader.
- Be knowledgeable about the physician's history in the marketplace:
  - What journals do they contribute to?
  - What is their relationship to other pharmaceutical companies? (This information can often be obtained through a consultation with the previous Specialty Representative or a tenured Specialty Representative within your district or territory, your Business Manager, MIT or the marketing team).
- Speak to the thought leader's desire to focus on their needs, through providing assistance in:
  - Providing opportunities to speak (if desired),
  - Helping them stay abreast of current research,
  - Helping them stay abreast of what peers and colleagues are doing in the marketplace,
- Schedule time with the thought leaders through:
  - Attending the same meetings they attend,
  - Asking them to participate in a tutorial or preceptorship,
  - Meeting with their administrative assistant to find out what are the key interests of the thought leader (i.e., teaching, patient care, research, etc.).

Thought Leader Access Strategy

Activity #4

Time: 20 minutes

ACTIVITY: THOUGHT LEADER ACCESS STRATEGY

Now that you are beginning to understand your top 3-5 thought leaders advocates' key drivers, it's time to develop a strategy for accessing these physicians. In addition, you'll also want to identify the Merck resources to assist you in this effort.

To accomplish these tasks, you will need to complete the Access Strategy and Resources to Assist in Gaining Access sections of the Advocate Access Strategy Section of your Advocate Action Plan. In order to develop your strategy for accessing your physicians you will need to:

1. Develop an access strategy for each thought leader advocate you identified the previous exercise. Record this information in the "Access Strategy" section of your Advocate Action Plan (Page 34-43).
2. Identify the resources that can assist you in gaining access to a thought leader advocate. Record this information in the Resources to Assist in Gaining Access sections of your Advocate Action Plan

Managing Current Advocates

Self-paced Reading

Time: 10 minutes

INTRODUCTION

So far in this course, we've been focusing on understanding and gaining access to thought leaders. Now that you understand the key drivers of thought leaders and how to gain access to them, let's focus on how to appropriately manage the advocates in your territory.

The key to managing advocates is assessment. Determining which advocate is the most appropriate in a given situation is important. In order to make this determination you need to consider the following:

- The advocate's sphere of influence (local, regional or national).
- The status level of the advocate (low, medium, high).
- The advocate's speaker qualifications (if they are an advocate who speaks).
- The area of advocate expertise required by the situation (clinical, teaching, research, business).

Earlier in this workbook we discussed sphere of influence, in this section we'll focus on the other factors that contribute to properly managing advocates. All this information helps you determine the strength and weaknesses of a particular advocate and to help you understand the impact they may have on your territory. In working with an advocate, it is important to match the advocate with situation to ensure a positive outcome for both you and the advocate.

LEVELS OF ADVOCATES

Advocates are placed on the Advocate Development Continuum according to their beliefs and behaviors. This continuum can assist you in determining how to best work with and manage a given advocate. The advocate's status level, in addition to the factors mentioned above, will help you determine the best way to work with that advocate to achieve your objectives.

- Low Advocate Status:
  - Advocate Level 1 is a physician who:
    - → Is a critical driver of business.
    - → May be an advocate for the competition.
  - Advocate Level 2 is a physician who believes in use of Drug Class, but does not distinguish between products in class.
- Medium Advocate Status:
  - Advocate Level 3 is a physician who believes in use of Drug Class, does distinguish between products in class and supports some scientific issues (approximately 1-2).
  - Advocate Level 4 is a physician who believes in use of Drug Class, does distinguish between products in class, is qualified on multiple scientific

issues (>2) and is familiar and current with prescribing information for Merck product.

- High Advocate Status:
  - Advocate Level 5 is a physician who believes in use of Drug Class, does distinguish between products in class, is qualified on all scientific issues and is very familiar and current with prescribing information for Merck product.

CRITERIA TO ASSESS QUALIFIED SPEAKERS

In addition to assessing an advocate's status, you'll also want to determine their speaking qualifications. The following criteria can be used to help you manage advocate speakers:

- A **preferred speaker** is a qualified advocate who is willing and able to conduct multiple HEL programs. Preferred speakers should have outstanding delivery and provide favorable yet balanced HEL presentations. In general, the goal is to use these types of speakers approximately ten times per year, although the actual desired frequency of use may vary somewhat by therapeutic area and/or MBO objectives.
- A **recommended speaker** is a qualified advocate who is willing and able to conduct multiple HEL programs. Recommended speakers also deliver favorable, scientifically balanced HEL programs, however they may not be as strong of a speaker, or as willing to do talks as a preferred speaker. In general, the goal is to use these types of speakers approximately 5-6 times per year, although the actual desired frequency of use may vary somewhat by therapeutic area.
- A speaker classified as "**Other**" should only be used one or two times a year. 'Other' speakers may not be able or willing to do multiple HEL programs per year, and prefer to limit the number of speaker engagements. Or, they could be one of your speakers in-development, who can deliver favorable, scientifically balanced HEL programs.
- Speakers without a status means that for one reason or another this speaker should not be used for HEL programs. Regional HEL coordinators will NOT use speakers whose HEL status is left blank.

Like the advocate status, the speaker's rating can impacts which situations are best suited to a speaker's skills and personal goals.

TECHNIQUES FOR MANAGING ADVOCATES

In managing advocates, you'll want to look at the criteria discussed previously, such as their beliefs and behaviors, needs, approaches to patient management, sphere of influence, advocate status and speaker qualifications to determine which situations are best suited for a particular advocate.

It's important to remember, that advocacy status is defined by Merck, whereas thought leader status is defined by the marketplace and professional reputation.

Therefore, there is the ability for you to create opportunities for working with advocates even if they are more aligned with a competitive product. For example, an advocate level 1 physician may be an appropriate choice to present on epidemiology or pathophysilogy. However, this person may not be the best choice to discuss current therapies for a given disease entity, as this might entail product comparisons. The goal is to respect the integrity and skill set of the Advocate without compromising the integrity of the opportunity to provide fair and balanced data relative to a disease and treatment options.

In managing advocates, you will also want to consider the advocate's unique skills and knowledge and the opportunities that exist to support your business goals as well as the advocates. In developing an advocate management strategy you may want to ask yourself the following questions:

- How will you manage access to them?
  - Will you control access to the advocates or would you prefer that other Merck professionals contact the advocates directly? You'll want to discuss your advocates' preference with regard to access before making any decisions.
- How will you ensure your advocates' needs are met?
  - How can you help them network among professional peers and patient population?
  - How can you help them learn from the clinical experience of other physicians?
  - How can you help them improve their clinical skills?
- How will you support your advocate's speaking needs?
  - How can you assist them in improving their speaking skills?
  - How can you assist them in the development of M/L approved slides?
  - How can you help them obtain M/L approved slide sets for their use?
  - How can you help them uncover forums for speaking?
- How can you match the right advocate with the right opportunity? For example:
  - Using lower level advocates for market expansion and professional education opportunities vs. those activities that are best served by higher level advocates (such as formulary decisions.)
  - Assessing the opportunity and managing the expectations of your Merck counterparts accordingly. It would be inappropriate to match a low level advocate to a very product specific opportunity
  - The following examples will provide you with some guidance on how to best manage an advocate to ensure you match their level of advocacy with the sphere of influence and the opportunity:
    - → When conducting a large national symposium on epidemiology, a national thought leader (due to nationwide audience) is recommended. However, the advocacy level of the speaker is less of an issue (and could be rated low) because the subject matter is not product specific.

- When conducting a regional symposium to cover current therapies on Migraine a regional or national thought leader (due to audience makeup) is recommended. The speaker should also have a high advocate status (high-medium or above) because the discussion entails current therapies and will likely include M/L approved product discussions.
- When addressing a national meeting for Pharm's, a national thought leader (due to the nationwide audience) is appropriate. In addition, the advocacy status should be high due to their need for accurate and fair balanced product information.
- When conducting a roundtable in an area of your territory that accounts for a large segment of your overall business, a local or regional thought leader with a medium to high level of advocacy is appropriate.

When managing advocates it is critical to align the opportunity with the skills, knowledge, sphere of influence and status of the advocate. Using all of these factors will allow you to determine how to best manage the advocates in your territory.

Advocate Management Strategy

Activity #5

Time: 30 minutes

ACTIVITY: ADVOCATE MANAGEMENT STRAGEGY

Now that you understand the techniques for managing the thought leader advocates in your territory, develop a strategy for managing the top 3-5 thought leader advocates from the previous exercises.

In order to develop your management strategy you will need to:

1. Identify advocate level and speaker qualifications (if applicable), by completing column 5 and 6 of the Advocate Action Plan on pages 34-43.
2. Determine how you will best manage the thought leader advocate to ensure you are matching the advocate's abilities and desires with the appropriate opportunities. Record your goals in the Management Strategy section of the Advocate Action Plan.
3. Use the questions posed on page 30 in the Techniques for Managing Advocates section of this workbook.

Conclusion

Activity #6

Time: 30 minutes

NEXT STEPS

You should now have an understanding of the tools you need to access the thought leaders and manage the advocates in your territory. Since this is the first time you've developed an Advocate Action Plan as a Specialty Representative for Merck, you should share this plan with your Business Manager to obtain his or her feedback and refine the plan as necessary.

Going forward, you should continually analyze the information regarding your thought leaders and update your Advocate Action Plan as necessary to ensure that you make the best use of your time on territory.

ACTIVITY: SHARE ADVOCATE ACTION PLAN WITH MANAGER

Once you have completed your Advocate Action Plan, schedule some time with your Business Manager to review your plan to obtain his or her feedback. Once you've discussed your plan, you will probably need to revise it based on your Manager's feedback. This process will help ensure that your plan is realistic and achievable.

Finally, be sure to bring the most current version of your Advocate Action Plan to the Specialty Foundations Workshop. You will be using your plan throughout the Advocate Development session in that workshop to build upon the concepts discussed in this workbook.

Advocate Action Plan

Thought Leader Advocate #1: ______________________

Beliefs and Behaviors	Needs	Approach to Patient Management	Sphere of Influence	Advocate Level	Speaker Qualifications

SPECIALTY FOUNDATIONS

Access Strategy:

Resources to Assist in Gaining Access:

Management Strategy:

SPECIALTY FOUNDATIONS

Thought Leader Advocate #2: ____________________

Beliefs and Behaviors	Needs	Approach to Patient Management	Sphere of Influence	Advocate Level	Speaker Qualifications

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SPECIALTY FOUNDATIONS

Access Strategy:

Resources to Assist in Gaining Access:

Management Strategy:

SPECIALTY FOUNDATIONS

Thought Leader Advocate #3: ______________________________

Beliefs and Behaviors	Needs	Approach to Patient Management	Sphere of Influence	Advocate Level	Speaker Qualifications

SPECIALTY FOUNDATIONS

Access Strategy:

Resources to Assist in Gaining Access:

Management Strategy:

SPECIALTY FOUNDATIONS

Thought Leader Advocate #4: ______________________

Beliefs and Behaviors	Needs	Approach to Patient Management	Sphere of Influence	Advocate Level	Speaker Qualifications

SPECIALTY FOUNDATIONS

Access Strategy:

Resources to Assist in Gaining Access:

Management Strategy:

SPECIALTY FOUNDATIONS

Thought Leader Advocate #5: ______________________

Beliefs and Behaviors	Needs	Approach to Patient Management	Sphere of Influence	Advocate Level	Speaker Qualifications

SPECIALTY FOUNDATIONS

Access Strategy:

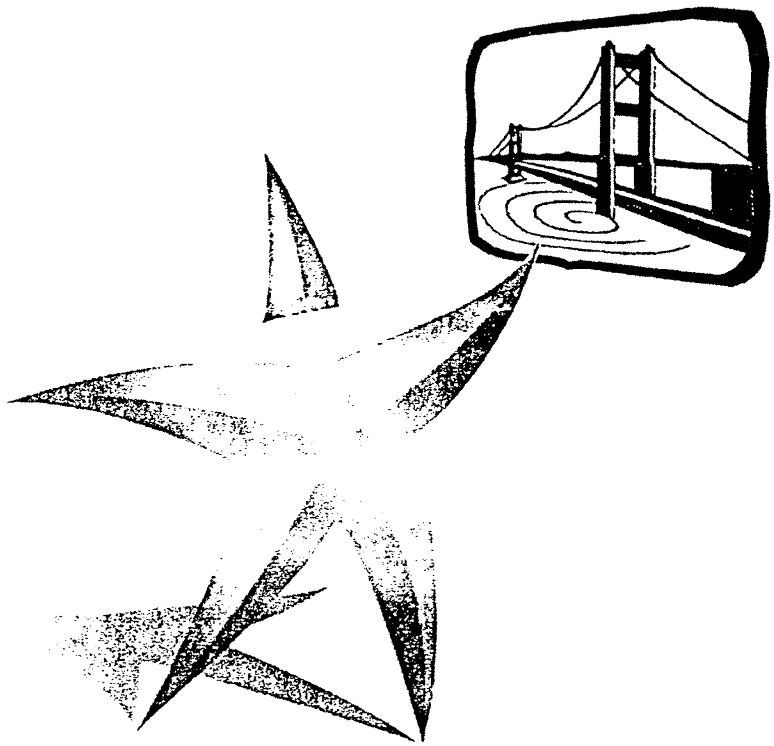
Resources to Assist in Gaining Access:

Management Strategy:

*** Slip Sheet ***

Document

Specialty Foundations



Course Completion Guide

Specialty Representative
Advocate Development
Foundations

Ver. 05/2001

Compliance Instruction

You are reminded that all of your activities must comply with all applicable Policy Letters and Corporate Policies. Although many such policies apply to your activities in this training course, Policy Letters 110 and 118 are of particular relevance.

You are further reminded that anyone who violates any Policy Letter is subject to immediate disciplinary action up to and including termination.

Advocate Development

Instructions:

Use this course completion guide to review the required documents from each representative so you can "sign-off" for approval.

Requirements:

1. Introduction & Self Assessment
2. What's my Role?
3. Share Advocate Action Plan with Manager

Requirement #1: Introduction Self-Assessment

Representatives should complete the Self-Assessment. Suggested answers are provided below:

- ❑ 1. What is the standard definition of a thought leader?
  - A thought leader, as defined by the market, has several characteristics:
    - Customers who, due to their ability to influence their peers, drive therapeutic business at the national, regional or local level.
    - These individuals may not necessarily be a top prescriber. However, their decisions and influence will impact the prescribing habits of others.
    - They may or may not be in alignment with Merck's clinical and business positions.

- ❑ 2. How does Merck define an advocate?
  - An advocate (as defined by Merck) is an individual who is a thought leader AND is very familiar with the prescribing information for the Merck product(s) and understands and supports the medically/legally approved materials available for the product(s). An advocate can, Influence colleagues through peer-to-peer relationships, hold beliefs that are congruent with the approved labeling and indications for the use of the Merck product(s) in the appropriate patient indications and be a speaker.

- ❑ 3. Which factors should you look at to gain an understanding of the thought leaders in your territory?
  - To gain an understanding of the thought leader's in your territory you should understand their:
    - Beliefs and behaviors
    - Needs
    - Approaches to patient management
    - Sphere of influence

- ❑ 4. What are the three spheres of influence (and their definitions) that a thought leader can have?
  - Local Thought Leaders: Also called community thought leaders. These people are well respected and have influence within their immediate area, such as a city or a portion of a state. Typically, a local thought leader influences physicians at the primary care level and their immediate peer group of specialists.
  - Regional Thought Leaders: These people are well respected and have influence over a larger geographic region than do local thought leaders. For example, a regional thought leaders might have influence over an entire state or even several states. Typically, a regional thought leader influences physicians at the level of specialists and primary care physicians.
  - National Thought Leaders: These people are well respected and have influence nationally. National thought leaders are usually seen as top thought leaders in their field of expertise and may even be driving the treatment approaches and methods on a national level. Typically, a national thought leader influences physicians at all levels across the nation.

- ❑ 5. What are some of the resources you can use to gain access to the thought leader's in your territory?
  - Internal Resources
  - Office Based Representatives (OBR)
  - Business Manager
  - Other Specialty Representatives in Territory
  - Marketing Team/Merck Research Laboratories (MRL) Contacts
  - Health Education Liaison (HEL) Programs
  - Studies
  - Consultants Meetings
  - Strategic Advisory Board
  - External Resources
  - Thought Leader's Peers
  - Thought Leader's Office Personnel
  - Continuing Medical Education (CME) Initiatives

- ❑ 6. What are some of the techniques you can use to gain access to thought leaders?
  - Be prepared for your appointment (i.e., do your homework).
  - Obtain a referral from the previous Specialty Representative.
  - Be knowledgeable about the physician's history in the marketplace.
  - Speak to the thought leaders desire to focus on their needs.
  - Schedule time with the thought leaders.