

Welcome

*****For Confidentiality Purposes, We Have Hidden the Client Name and Identifying Information*****



Valuation Study

**Presented By:
Spica Consulting Group**

Wednesday, August 8, 2007

The Consultancy and Sponsor Team

Spica Consulting Group

Client

Agenda

- Project Overview
 1. Problem Statement
 2. Target Population
 3. Research Questions
 4. Purpose
- Contracting Terms
- Methodology
- Timeline
- Data Analysis Strategy
- Feedback Process

Overview

- Current organizational restructuring
 - Therapeutic based reorganization
- Explore opportunities and challenges in the new alignment
- Trying to enhance collaborative possibilities
- Successful integration of ██████ into new business processes

Problem Statement

How can [REDACTED] group best meet the needs of its stakeholders?

Target Population

3 Major Groups

- Internal ██████████'s Personnel
 1. Therapeutic Area Operations Directors/Medical Leaders
 2. Functional Managers
- External Educators
 3. Executive management of:
 - Accredited Providers
 - Medical Education Communications Companies

Research Questions

1. How effective has [REDACTED] been in demonstrating value with its key stakeholders?
2. What can/should [REDACTED] do to better collaborate with internal partners?
3. What changes, in both processes and responsibilities, should [REDACTED] consider to improve the value of supported educational activities?

Purpose

1. Identify needs, expectations and desires of internal customers with regards to areas of potential overlap with other functions
2. Partner effectively with educators to support valuable educational activities
3. Determine how educational success is, can, and should be measured
4. Raise awareness of the department's commitment to demonstrating value through clinical education
5. Enlist support to build new models for collaboration
6. Provide a baseline snapshot for ongoing evaluation in both the quantity and quality of interactions the department has with its customers

Contracting Terms

- Six-month service agreement
- Creation of necessary tools and assessments
- Feedback session of findings
- Confidentiality and Proprietary information

Methodology

1. Interviews

1. External National/Global Opinion Leaders
2. Executive management of:
 1. Accredited Providers
 2. Medical Education Communications Companies
3. Internal Medical Leaders

2. Focus Groups

- Internal [REDACTED] Operations Directors and Therapeutic Area Directors

3. Surveys

- Functional managers [REDACTED] [REDACTED] (field-based medical), and Clinical Trials)

Interviews

Interview Letter

Dear _____

You have been chosen to participate in an initiative that is examining how BI CME can best meet the needs of its partners. As a _____ your input and experiences would greatly help us understand BI CME's current relationship with you and/or the department you represent as well as how you think they could better meet your needs.

By participating in a one-hour interview you will enable us to better understand issues such as the nature of your collaboration with CME, how frequently you collaborate, and the quality of your interactions with CME to date. It is expected that the needs and issues identified as a result of this interview will inform the ways CME continues to interact with you and its other stakeholders in the future.

The interview will be scheduled at a mutually convenient time within the next two weeks. There will be one consultant administering the interview, which will be recorded and transcribed for later analysis. The interview transcript and recording will be accessible only to project researchers and analysts. When the final analysis is reported we will not identify individual respondents in such a way that responses can be attributed to them. Your anonymity will be preserved throughout this process.

This project was initiated by the BI CME Team (Walt Wolyniec, Dr. Karen Dzenko, Dr. Jodi Scheckerman and Sherlyn Celone) and has the full support of Dr. Ken Newman, VP, Medical Affairs and Mr. Jeff Huth, VP, Marketing.

Your participation in this study is appreciated. If you have any questions, please contact Gravity Goldberg at gravidgoldberg@prideconsulting.com or 555-555-5555.

Thank you in advance for your help with this study.

Gravity Goldberg

Interview Guide and Expectations

Personnel Required:

- 2 Consultants: 1 to ask questions, 1 to take notes on computer
- In lieu of a 2nd consultant to act as scribe, a tape recorder or other means of recording may be used with the assumption the subject(s) are notified and have consented

Duration:

- Approximately 60 minutes
 - 45 minutes for structured questions
 - 15 minutes for open ended inquiry and discussion

Preparation:

- 1) Identify potential probes for all structured responses
- 2) Monitor time allotted to each response, allowing for complete responses but being sensitive to time constraints and structured questions
- 3) Review in-scope responses and standard response for out-of-scope responses
 - Examples:
 - a. "That's something I'd like to explore further"
 - b. "How does it relate to the question asked?"
- 4) Assess interviewee interest and energy in topic and questions and watch for nonverbal cues

Protocol:

Thank interviewee for their time and candor

"I want to thank you for your time. We recognize how busy you are and appreciate your input"

Introduce interviewers and state roles in interview

"My name is Matt and this is Sepi. I'm going to be asking you some questions and Sepi is going to be taking notes while we speak"

Link interviewers to client and stated problem

"We're with Pride Consulting Group and were invited here today by Walt Wolyniec (CME Director) and Ken Newman (VP, Medical Affairs) to learn how BI CME can improve its partnerships"

Set interviewee expectations regarding time involved and types of questions

"The interview will last one hour, and we'll be asking a bunch of questions for the first 45 minutes or so and then will have some time to explore other ideas that come up."

Explain how data will be analyzed and how names and identifiers are not given to client or consultants

INTERVIEW: External Educators (Executive Management of Accredited Providers and Medical Education Companies)

1. Do you feel Boehringer Ingelheim Pharmaceuticals, Inc.'s Continuing Medical Education (BI CME) group views its relationship with you as a partnership? How does this relationship compare with other commercial supporters?

2. a) What is the mission of your organization?
b) What's the key points for your organization this coming year?

3. a) What has Boehringer Ingelheim Pharmaceuticals, Inc.'s Continuing Medical Education offered your company?
b) What additional services, resources or activities could BI's CME offer?

4. Please explain what an ideal value exchange would encompass.

5. What role do you believe Boehringer Ingelheim Pharmaceuticals, Inc.'s Continuing Medical Education played in the CME community? In educating clinicians generally?

6. How do you define educational success? Do you feel success has been achieved through the educational activities you've managed with Boehringer Ingelheim Pharmaceuticals, Inc.'s support?

7. Please think back to your most successful partnerships. Do you believe you can achieve this with Boehringer Ingelheim Pharmaceuticals, Inc.'s Continuing Medical Education? If so, how?

8. Do you have additional experiences that have not been discussed? If so, what are they?

Focus Groups

Focus Group Letter

Dear _____,

You have been chosen to participate in an initiative that is examining how BI CME can best meet the needs of its partners. As a _____ your input and experiences would greatly help us understand BI CME's current relationship with you and/or the department you represent as well as how you think they could better meet your needs.

By participating in a focus group you will enable us to better understand issues such as the nature of your collaboration with CME, how frequently you collaborate, and the quality of your interactions with CME to date. It is expected that the needs and issues identified as a result of this interview will inform the ways CME continues to interact with you and its other stakeholders in the future.

The focus group will be scheduled at a convenient time within the next two weeks. There will be one consultant facilitating the focus group, which will be recorded and transcribed for later analysis. The focus group transcript and recording will be accessible only to project researchers and analysts. When the final analysis is reported we will not identify individual respondents in such a way that responses can be attributed to them. Your anonymity will be preserved throughout this process.

This project was initiated by the BI CME Team (Walt Wolyniec, Dr. Karen Dzenko, Dr. Jodi Scheckerman and Sherlyn Celone) and has the full support of Dr. Ken Newman, VP, Medical Affairs and Mr. Jeff Huth, VP, Marketing.

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Focus Group Guide and Expectations

Personnel Required:

- 2 Consultants: 1 to ask/facilitate, 1 to take notes on computer
- In lieu of a 2nd consultant to act as scribe, a tape recorder or other means of recording may be used with the assumption the subject(s) are notified and have consented

Duration:

- Approximately 60 minutes
 - 15 minutes for group conversation directed by facilitator questions
 - 15 minutes for open ended inquiry and discussion

Preparation:

- 1) Identify potential probes for all structured responses
- 2) Guide conversations which may become tangential to core topic or questions and be prepared to bring the group back on track
Examples:
 - a. Use of parking lot for ideas
 - b. "That is an interesting point. Why don't we table that and circle back during the open discussion?"
- 3) Review in-scope responses and standard response for out-of-scope responses
Examples:
 - a. "That's something I'd like to explore further"
 - b. "How does it relate to the question asked?"
- 4) Assess participant interest and energy in topic and questions and watch for nonverbal cues. This applies to participants who are talking too much, or who do not voice opinions.
Examples:
 - a. "While I appreciate all of your valuable input, I would really like to get a well rounded view of the situation. Is this something everyone agrees with?"
 - b. "Why don't we hear from someone who has not talked as much?"
 - c. "You have all been asked to participate in this group because your input is valued. We would really like to hear what everyone has to say on this topic."

Protocol:

Thank participants for their time and candor

"I want to thank you for your time. We recognize how busy you are and appreciate your input"

Introduce facilitators and state roles in the focus group

"My name is Matt and this is Sept. I'm going to be asking you some questions and Sept is going to be taking notes while we speak. The questions are to be used as a guide for the discussion. I am here as a

FOCUS GROUPS Internal Medical Affairs Therapeutic Area Operations Directors and Medical Leaders.

Introduction:

Welcome to our focus group, we are pleased to have you. The purpose of this focus group is to gain insight to building a successful partnership between Boehringer Ingelheim Pharmaceuticals, Inc.'s Continuing Medical Education department and your department/organization.

Guidelines:

There are no right or wrong answers. Please respect everyone's comments, and patiently wait your turn to answer so that nobody is interrupted while speaking. Your responses will be kept completely anonymous. The results will be reported in general terms within the organization at large. We ask that each of you keep what you hear in this focus group anonymous as well.

Questions:

- How long have you been working in your function?
- Do you work cooperatively with others to achieve key objectives? How do you do this? How may you improve achieving this?
- Do the values of your team ensure that you change as your business environment changes? Is this usually a successful transition? If so, what factors cause the transition to be successful? If not, what could be done to improve the transition?
- If you were to collaborate with other functions (especially Continuing Medical Education) would you have sufficient resources?
- Does your organization/department provide you and the people you work with, the necessary resources such as people, funding, tools, to ensure initiatives are successfully achieved?
- Describe recent educational activities you have observed/unattended that you thought were successful. What worked well? What could have been improved?

Survey

Survey Letter of Announcement: Learners/Participants

You've been selected to participate in a survey of your experiences with Boehringer Ingelheim Pharmaceuticals, Inc.'s educational programs. Our records indicate that you have participated in educational activities supported by Boehringer Ingelheim Pharmaceuticals, Inc. Pharmaceuticals, Inc. and acknowledged a willingness to participate in follow-up evaluations. In the next week you will be electronically sent a link to an online survey and asked about 30 questions, which will take about 15 minutes of your time.

The results of this survey will help us better understand issues such as the nature of your collaboration with CME, how frequently you collaborate, and the quality of your interactions with CME to date. It is expected that the needs and issues identified as a result of this survey will inform the ways CME continues to interact with you and its other partners in the future.

Your participation is appreciated. If you have any questions, please contact Gravity Goldberg at gravitygoldberg@prideconsulting.com or 555-555-5555.

Thank you in advance for your help with this study.

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SURVEY

This survey is intended to get your opinion on the various sections below in regards to your organization. The results of this survey will enable us to identify what is done well in your organization, along with identifying any areas that may require improvement.

This survey is being distributed to all Functional Managers from the following departments: Professional Relations, Continuing Medical Education, Publications, Field Based Medical (HSS), as well as the Clinical Trials Department. Your responses to this survey will be completely anonymous. The results will be reported in general terms within the organization at large.

The following survey should take approximately 25 minutes to complete. This survey necessitates that you consider each question and mark the answer that best represents your opinion based on the scale below.

Example: Statement:	Never	Almost Never	Sometimes	Very Often	Always
I sing in the rain.				X	
Statement:	Never	Almost Never	Sometimes	Very Often	Always

Communication

1. Overall, information in this organization is communicated well.
2. Information is communicated honestly and openly.
3. I feel comfortable expressing my opinions.
4. My supervisor communicates well with me.
5. There is good communication between my superiors.

Timeline

Activity / Task	Aug 1	Sept 8	Oct 1	Oct 21	Nov 15	Dec 20	Jan 15	Feb 1	Feb 16	Mar 2	Mar 25	Apr 15	May 15
Contact ██████ Initial Meeting	✓												
Initial Meeting w/ Steering Committee		✓											
Develop Contract Proposal			✓										
Estbablish Contract				✓									
Develop Detailed Project Plan				✓									
Kickoff Meeting with ██████ Stakeholders				✓									
Develop Questioning Route for F-Group				✓									
Conduct Focus Groups					✓								
Summarize Data						✓							
Analyze Data						✓							
Develop Interview Guide & Questions						✓							
Interview External Leadership							✓						
Interview Nat'l/Global Opinion Leaders							✓						
Interview Internal Leadership							✓						
Analyze Data								✓					
Develop Survey Questions								✓					
Create Mailing List								✓					
Pilot Pre-test Survey									✓				
Distribute Survey Notice									✓				
Send out E-Survey										✓			
Provide Feedback											✓		
Prepare Final Report												✓	
Conduct Final Review of Report												✓	
Submit Final Report													✓

Data Analysis Strategy

Focus Groups and Interviews

- Data grouped according to respondent category
- All data coded, placed into themes and categories
- Search for identifiable patterns

Surveys

- Statistical analysis to analyze raw data
- Search for identifiable patterns and trends

Feedback Process

1. Feedback the value-added potential of [REDACTED] to its internal partners
2. Identify key issues discovered as a result of this intervention
3. Begin thinking about action planning based on agreed upon recommendations