

Portfolio
P&P Digital



Assumption based forecasting. **Requesting forecasts.**

Sept 2022

Bottom-up forecasting process steps

Forecast request	Global PF, BD, PM, LM or Regional PF	<ul style="list-style-type: none"> ➤ Check / adjust pack size settings ➤ Request countries in scope to update forecasts
Request forward to countries	Regional Portfolio	<ul style="list-style-type: none"> ➤ Approve request and forward it to countries, or reject ➤ Add further countries to forecast request
Forecast creation / update	Country Portfolio	<ul style="list-style-type: none"> ➤ Manage Market assumptions for country ➤ Create / update forecasts on Channel / Strength / Pack size level using market assumptions
Forecast release	Regional Portfolio	<ul style="list-style-type: none"> ➤ Release forecasts to pipeline
Request closure	Forecast requestor All SANDOZ	<ul style="list-style-type: none"> ➤ See updated pipeline in SANITY

Focus: initiating forecast request

Forecast
request

➤ Check / adjust pack size settings
on Project Strengths

➤ Request countries in scope
to update forecasts

- Make sure all pack sizes, types and units are defined correctly for each project strength
 - When creating forecasts, pack sizes can be selected from the pre-defined set
 - If additional pack sizes are needed, Country portfolio will need to request their creation by Regional portfolio, Project or BD deal manager.
- Initiate Forecast request from Portfolio Project, BD Deal, PLM or Selection Opp DD
 - Request forecast updates for all countries in scope, or part of them
 - See the progress of your Forecast update request

Focus: initiating forecast request

Forecast
request

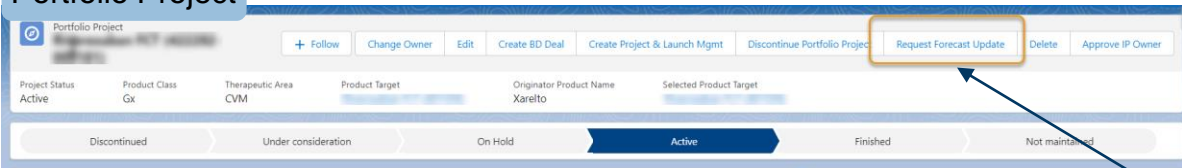
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How to request a forecast update (1/4)

Portfolio Project



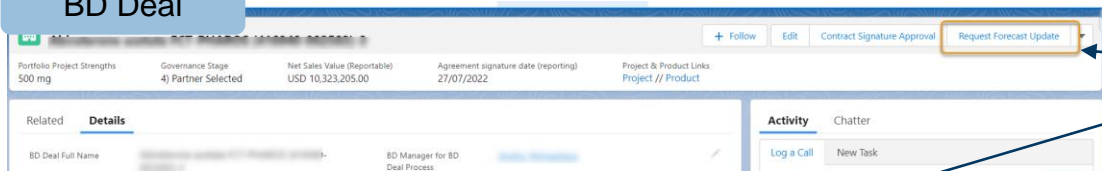
Portfolio Project

+ Follow Change Owner Edit Create BD Deal Create Project & Launch Mgmt Discontinue Portfolio Project **Request Forecast Update** Delete Approve IP Owner

Project Status: Active Product Class: Gx Therapeutic Area: CVM Product Target: [redacted] Originator Product Name: Xarelto Selected Product Target: [redacted]

Discontinued Under consideration On Hold **Active** Finished Not maintained

BD Deal



BD Deal

+ Follow Edit Contract Signature Approval **Request Forecast Update**

Portfolio Project Strengths: 500 mg Governance Stage: 4) Partner Selected Net Sales Value (Reportable): USD 10,323,295.00 Agreement signature date (reporting): 27/07/2022 Project & Product Links: Project // Product

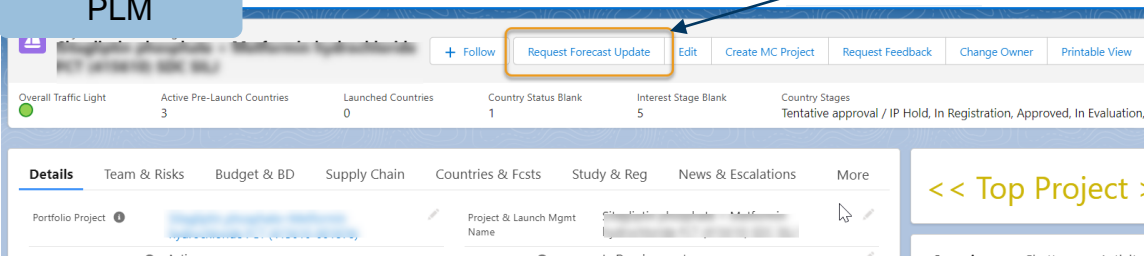
Related Details

BD Deal Full Name: [redacted] BD Manager for BD Deal Process: [redacted]

Activity Chatter

Log a Call New Task

PLM



PLM

+ Follow **Request Forecast Update** Edit Create MC Project Request Feedback Change Owner Printable View

Overall Traffic Light: Green Active Pre-Launch Countries: 3 Launched Countries: 0 Country Status Blank: 1 Interest Stage Blank: 5 Country Stages: Tentative approval / IP Hold, In Registration, Approved, In Evaluation

Details Team & Risks Budget & BD Supply Chain Countries & Fcsts Study & Reg News & Escalations More

Portfolio Project: [redacted] Project & Launch Mgmt Name: [redacted]

Product & Project Name: [redacted] Product Class: [redacted] In Development

1

Find a Forecast request button on your Portfolio Project, BD Deal or PLM record and click it



If you don't see this button, contact your SuperUser!

How to request a forecast update (2/4)

Please choose countries to request a forecast update. The below list displays countries that are active within the

* Regions

NAmer

☐ United States

Select All Unselect All

Next

2

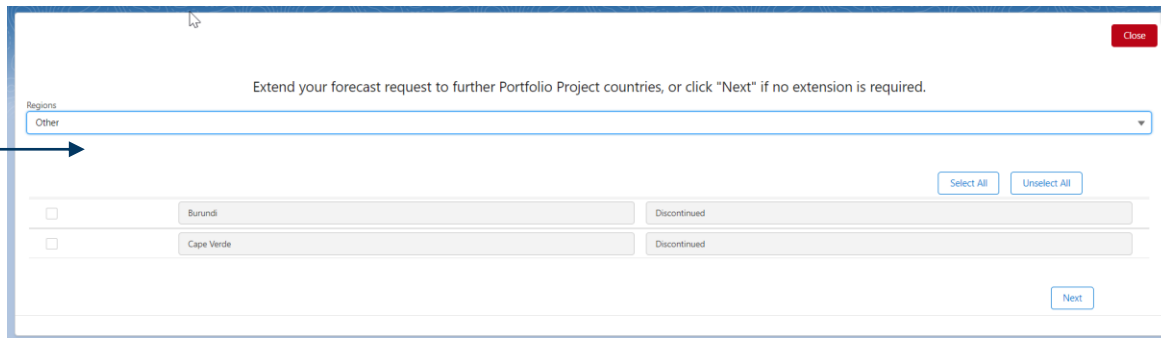
Select regions one by one, and define countries that should be included into your request in each region.
You will only see countries that are in the scope of your project / BD deal.

3

Click „Next“ when you have selected all the regions you were planning to select.

How to expand the forecast request to countries not included into the Project / BD deal

Follow the screens to first add countries that are included into the Portfolio Project, but not included into your BD Deal / PLM record (included discontinued CDLs)...



Extend your forecast request to further Portfolio Project countries, or click "Next" if no extension is required.

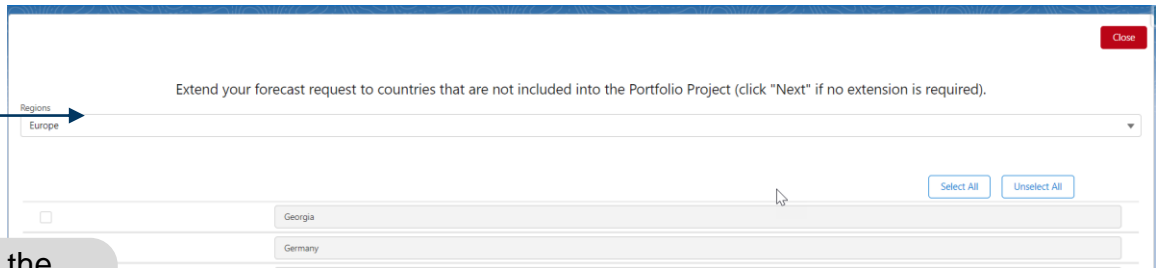
Regions
Other

<input type="checkbox"/>	Burundi	Discontinued
<input type="checkbox"/>	Cape Verde	Discontinued

Select All Unselect All

Next

... And then add countries that are not included into the Portfolio project.



Extend your forecast request to countries that are not included into the Portfolio Project (click "Next" if no extension is required).

Regions
Europe

<input type="checkbox"/>	Georgia	
<input type="checkbox"/>	Germany	

Select All Unselect All

Next



These countries will be added to the Portfolio Project with the Interest status „Project candidate“ and can then be included into a selection process as needed.

How to request a forecast update (3/4)

Close

You have chosen the following countries to request New / Updated forecasts. Please click "next" to proceed or "back" to update the countries.

Region	Country
Europe	Austria
Europe	Belarus
LATAM	Colombia
Europe	Cyprus
APMA	Hong Kong
APMA	Jordan

BackNext

4

Review your choice. Click „Back“ if you want to change something, and „Next“ if you are happy with the countries you selected.

How to request a forecast update (4/4)

The screenshot shows a web form for requesting a forecast update. It includes a dropdown menu for the reason, a text area for comments, a date field for the due date, and a file upload section. Numbered callouts (5-8) provide instructions for each step. Callout 5 points to the reason dropdown and the comments text area. Callout 6 points to the due date field. Callout 7 points to the file upload button. Callout 8 points to the 'Finish' button at the bottom right. A 'Close' button is located in the top right corner of the form area.

5 Select the reason for your forecast request and provide any additional information that would help users to process your request.

6 The default due date for your forecast request is set to 45 days, but can be changed.

7 You can upload one or more files that would help users to process your update request. These files will be accessible on the record where you initiated your Forecast request (Portfolio Project, BD Deal, PLM).

8 Click „Finish“ when you are ready.

* Please select the forecast request reason
Select

* Please provide any additional comments that should be part of this request
Enter Text

* Please provide a due date for this forecast request
07.11.2022

Please click below to upload any new file which is not already available that would support the forecast update. Your file will be saved to the record this request was requested from, and will also be visible on the regional forecast request records.

Upload Files Or drop files

If you are ready to proceed with Forecast Request creation, please click "Finish". This will create Forecast request

Close

Finish

Monitor your forecast update requests

Portfolio Project
Methylphenidate hydrochloride PRCH (416504-001850)

Project Status: Active | Product Class: Gx | Therapeutic Area: CNS | Product Target: Methylphenidate hydrochloride PRCH (416463) | Originator Product Name: Medikenet adult | Selected Product Target: Methylphenidate hydrochloride PRCH (416463)

Discontinued | Under consideration | On Hold | **Active** | Finished | Not maintained

Details | BD & PLM | Str & Packs | Country Detail | Forecasts | Selections & Escalations | Quip

One Forecast for each region will be created.
For NAmex, separate requests will be created for Canada and US.
Regional Portfolio is now ready to start managing their regional Forecast requests,

Forecast Request | Str & Packs

Forecast Requests (2)

- Req-202210-00069
Region: Europe
Due date: 19/11/2022
Status: In Progress
- Req-202210-00084
Region: Europe
Due date: 25/11/2022
Status: Initiated

P&L Mgt | Selections

Overview | Snapshot | Fcst Sales | Fcst Volume | More

Forecast Details

Forecast First Launch Year: 2024

Forecast Sales (Current Total L+5) USD 22,122,328.00	Fcst Sales Pipeline (Curr Total L+5) USD 22,122,328.00
Forecast Sales (Current Total L+10)	Fcst Sales Pipeline (Curr Total L+10)

Understand the details of a Forecast request (1/2)

Forecast Request

Forecast Request Name: Req-202207-00043 Initiated from: PLM Status: Initiated Created By: Natalia Kuehnert, 26.07.2022 09:25

Before forwarding this request to countries, please make sure that all the required project strength & pack size combinations are available. Click on the "Project Strengths & Packs" tab to check.

Details Files Project Strengths & Packs

Region: NAmer Country: US

Additional information: test

▼ Details

Status: Initiated Forecast request reason: Launch commitment Initiated from: PLM

Due date: 09.09.2022

▼ Links

Business Development Deal Project & Launch Management

Portfolio Project

Created By: Natalia Kuehnert, 26.07.2022 09:25

Owner: Regional Portfolio US

11 Business Use Only | SANITY - Re

Region indicates the region of this forecast request is addressed to. Country field is only populated for NAm region, to indicate if the request was created for US or Canada.

Status field indicates the status of this forecast request. Following values are available:

Status	Explanation
Initiated	Regional PF has not yet started to work on this request
In Progress	Forecast request was forwarded for at least one country
Fulfilled	Forecasts have been created and released for all the countries to which the forecast request was forwarded.
Rejected	Forecast request was rejected for all countries
Cancelled by requestor	Request has been cancelled

Owner indicates the user who is responsible for completing this forecast request. Initially, forecast requests are assigned to a regional queue; Regional portfolio managers assign the request to themselves when they start working on it.

Understand the details of a Forecast request (2/2)

Assign to me Manage Forecast Request Sharing Hierarchy Delete Edit Clone Sharing New Task Change Owner

for selection under the connected Portfolio Project.

Country FC update requests (1)
1 item • Updated a few seconds ago

Country FC update request: CDI Reg Link Country FC update request: Fore...

Status	Explanation
Pending	not yet forwarded to country by Regional PF
Forwarded	Regional PF has forwarded the request to this country
Rejected	Regional PF has rejected the forecast request for this country
Pending approval	Forecasts have already been created and are pending approval by Regional Portfolio
Fulfilled	Forecasts have already been released for this country by Regional Portfolio
Cancelled	Request has been cancelled

Activity

New Task

Create a task... Add

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

In the top right section, you see the status of the Forecast update request country by country.
Following status value are available:

Status	Explanation
Pending	not yet forwarded to country by Regional PF
Forwarded	Regional PF has forwarded the request to this country
Rejected	Regional PF has rejected the forecast request for this country
Pending approval	Forecasts have already been created and are pending approval by Regional Portfolio
Fulfilled	Forecasts have already been released for this country by Regional Portfolio
Cancelled	Request has been cancelled



Thank you