

5. Confirmatory Evaluation



Arunachalam, Arun
Global Business Process Manager

^ Step 5.1. DD Close Out Meeting

Responsibility: BD Manager & DD Manager;

Consulted: All functions involved in the risk assessment process;

Organize DD Close-out meeting with all functions involved (technical and non-technical). BD along with functions will together decide who would be the functions that really need to provide a feedback and approval on SANITY and agree on timelines for feedback and approval submission on SANITY.

^ Step 5.2. DRB Feedback (Confirmatory Risk Assessment)

Responsibility: BD Manager;

Consulted: DD Manager, CCO Governance & Process, Business Operations & All functions who are requested PSB Feedback;

Please note that Deal Review Risk Assessment process involves 2 steps:

1. Contractual Risk Assessment - Feedback from Functions
2. Contractual Risk Review - Feedback from BD



As agreed on the DD close-out meeting,

1. BD will [Request DRB Feedback after doing the preliminary checks.](#)
2. Functions will [Provide DRB Feedback on the Opportunity Assessment records.](#)

Potential doubts/asks for help from BD:

- For list of functions to be included in the PSB Feedback, please refer here: [PSB/DRB/CAR Approval for different BD Deal Types](#)
- If a Functional member is new to digitally recording the assessment/approval on SANITY, please share this link: [BD Onboarding for Functional Members](#) for a quicker onboarding, which includes everything they need to know.
- Refer here for [Handling Inactive Team Members Error message during Feedback/Approval](#)
- If a specific function/member has been missed out while requesting PSB feedback, [Request DRB Feedback individually.](#)
- BD or Functions could easily [Access/Track the status of Feedback requests.](#)
- If a functional member you requested PSB feedback is ooo or if another member is to be replaced, please [Reassign the Feedback Request.](#)

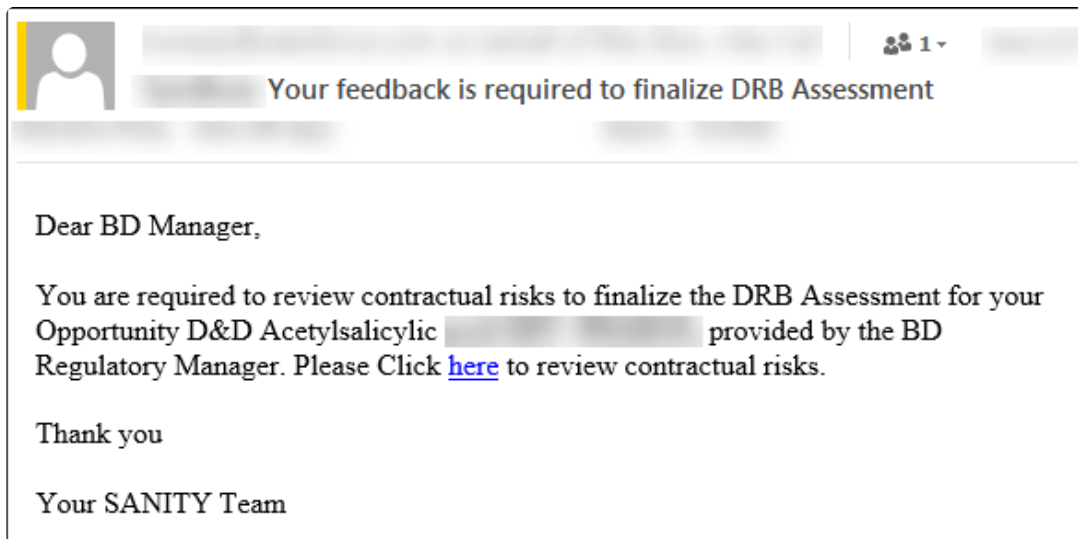
Only if you tried all the above links and still require help, contact *Business Operations*.

^ Step 5.3. Contractual Risk Review

Responsibility: BD Manager;

Consulted: DD Manager, CCO Governance & Process, Business Operations & All functions who are requested PSB Feedback;

For each Assessment record is finalized by the function (meaning the **Assessment Status** is set to **Contractual Risk Review**) the BD Manager will receive an email message notifying that the assessment has been finalized by the function and it's ready for them to review the contractual risks.



You can open this assessment by clicking the hyperlink in the email you have received or you can check all consolidated assessments on the Opp. DD.

[Refer here for optimized view of DRB Feedbacks on the Opp. DD record.](#)

The screenshot displays the 'Opportunity Assessment' interface. The top navigation bar includes 'Assessment', 'Follow', 'Create Additional Assessment', 'Printable View', and 'Delete'. The main content area is divided into 'Details', 'Historical Assessments', and 'Record History & Activity'. The 'Details' section shows fields for 'Opportunity Diligence' (Acetylsalicylic), 'Owner' (Karan), 'Function' (Regulatory), 'Role' (BD Regulatory Manager), 'Feedback Type' (Deal Review Board), 'Summary' (Good), 'Overall Assessment' (Contractual Risk Review), 'Assessment Status' (Low Risk/Acceptable Conditions), and 'Status' (Green). The right sidebar contains the 'Contractual Risk Assessment' section, which includes a 'Contractual Risk Mitigation' field (Nothing to be done), a checkbox for 'Contractual risk resolved or no risk' (checked), a checkbox for 'Resolution needed after signature' (unchecked), and an 'Assessment Status' field (Final). A 'Next' button is located at the bottom right of the sidebar. A legend at the bottom of the sidebar defines risk levels: Low Risk / Acceptable Conditions (Green), Medium Risk / No major risks identified or medium risks include (Yellow), and High Risk / No critical risks identified or minor risks include (Red).

After clicking the link,

All the Assessment records, with "Feedback Type" "Deal Review Board", for a given opp...

1. On the **Opportunity Assessment** record
2. On the **Contractual Risk Assessment** section on the right side,

- a. Provide the appropriate mitigation action for the highlighted risk (copied from the contract) in the **Contractual Risk Mitigation** field
 - b. Tick the appropriate checkbox, either **Contractual risk resolved or no risk or Resolution needed after signature**
 - c. Set the **Assessment Status** to **Final**
 - d. Click **Next**
3. Click **Finish** on the success message window

Note: Opportunity Assessments with '**Resolution needed after signature**' checkboxes ticked are for the attention of project Management to follow-up post signature.

Upon requesting DRB Approval,

- the BD opportunity will automatically move to 'Deal Review Process'
- the BD Deal will automatically move to '6) Deal Approval'.

Please update [Deal Closure Likelihood %](#) and [appropriate](#)

