

# 1. Pre-allocation & Assignment



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## ^ Step 0.1: Formal allocation at GPC

Responsibility: Platforms, Portfolio & Business Operations;  
Approvers: GPC;

Small Molecules BD Processes starts with an allocation of a Small Molecules Product to BD&L by GPC.

All projects that BD expends its resources for, should be allocated at GPC.

This includes new selections, scope extensions, addition of key countries to existing projects.

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***GPC: Global Pipeline Committee serves as the single governance body responsible for approval and documentation of all pipeline selections/additions, project stops and investment decisions within allocated budget for Small Molecules.***

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All Portfolio projects formally allocated at GPC would have on SANITY, **Product Source** as 'BD&L' and **Selection Date** updated. **Selection date** corresponds to date of endorsement for the selection by GPC.

Portfolio Project records on SANITY without a **Selection date** would be considered unselected from the reporting perspective.

- Reference: [GPC - Global Portfolio Committee Charter\\_V1.1.pdf](#)
- GPC connects monthly: [GPC meetings - Current\\_yr](#)
- Financial thresholds for allocation to BD&L: [Selection Criteria.pptx](#)

## Scope of GPC:

New

Selections &  
Overarching

pipeline  
strategy  
decisions,

Project  
updates &

escalations

impacting  
product

strategy,

Pipeline value

oversight, In-

market, B2B

Initial scope confirmation.

Portfolio Project (423134)

+ Follow Create Project Selling Units Create BD Deal Create

Project Status: Active Product Class: Gx Therapeutic Area: CVM Product Target: Lincandipine Hydrochloride PCT (401173) Originator Product: Corifeo/Zanidup

Discontinued Under consideration On Hold

Details BD & PLM Str & Packs Country Detail NPV & Fcsts Selections & Escalations Regulatc

Project Status: Active Owner: [Redacted]

Selection Source: Regional Portfolio Project reference product pics: [Redacted]

Product Class: Gx Therapeutic Area: CVM

Product Source: BD&L ATC: Not Defined

Primary Project: Yes SANITY NUMBER: 009428

OTC Product (Y/N): Development Complexity: 2: Standard with BE study QUIP URL: [Redacted]

IP Owner: Selection Date: 26.01.2023

Funds Flow Approval Status

Key fields to pay attention to.

Business Development Deal (423134)

+ Follow Edit Clone Delete Create CAR Create Agreement Request Forecast Update

Project & Product Links: Project // Product Product Class: Biosimilar CCO Platform: Biosimilars Portfolio Project Strengths: Net Sales Value (Reportable): USD 0,00 Agreement Signature Month and Year: [Redacted]

Stopped On-Hold 1) Allocated 2) Identification 3) Early Evaluation 4) Partner Selected

Details Partner Countries Milestones Forecasts SPC & Agreement Scouting Escalations

Meeting Agenda Items (0)

New

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**In-bound interest** (for example, BD found an opportunity from CPHI Conference that might strengthen Sandoz Pipeline Value) or if there is a project or a key country or a project strength is not allocated at GPC, please request formal allocation at GPC by

1. Either channelizing the request to your respective Portfolio Team
2. Or by creating a Meeting Agenda Item (this is of-course possible, only if you have a Portfolio Project for the right variant already existing and allocated to BD&L already)
  - a. Request your BD Ops Manager to Create a BD Deal for **time-critical opportunities** to get started on SANITY and plan to request **retrospective allocation at GPC**.
  - b. After the deal is created, go to 'Escalations' Tab

Meeting Agenda Items

Details Deliverables Follow-Up Actions

Meeting Agenda Item full name

Agenda Item Source BD Deal  
This field is calculated upon save

Topic d Status Update  
View all dependencies

Meeting a GPC Sep 2024

Meeting Date e This field is calculated upon save

Meeting Name GPC Sep 2024

Description / Summary f

Details

Decision Proposed g --None--  
View all dependencies

Net Sales

Decision Final --None--  
View all dependencies

Cost

Forecast Sales / Current USD 0.00

Cancel Save

- c. Create a 'New' Meeting Agenda Item (and then choose 'Meeting Agenda Item')
- d. Choose 'Topic' as Status Update
- e. Tag it to the upcoming 'GPC Meeting'
- f. Update 'Description/Summary' to depict the background of your selection request
- g. Choose 'Decision Proposed' as 'Endorse'

### Knowledge nugget:

- One Portfolio Project on SANITY allocated to BD&L constitutes to one BD Deal contract with one BD Partner.
- An Initial (first) BD Deal created under a Portfolio Project constitutes to a parent agreement to be signed with a BD Partner.
- Any Territory extension/Line extension Deal under a Portfolio Project constitutes to an amendment to the initial contract.

### Please note:

- If an opportunity is pursued with another partner for the same product, there needs to be a separate portfolio project endorsed at GPC.
  - All BD Deals under one Parent Portfolio Project should constitute to one partner.
  - BD Deals pursued with different partners for the same products cannot co-exist under one portfolio project.
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## ^ Step 0.2: Recording decisions on SANITY

Responsibility: Platforms, Portfolio & Business Operations;

Following GPC Meeting, Platforms or Regional Portfolio Managers take time to provide the required inputs to Business Operations post which the selections/endorsements for extensions will be recorded on SANITY (meaning the following entities)

- Meeting minutes will be updated for all the escalations
- Creation of Product Targets and Portfolio Projects for new selections
- Inclusion of countries/Addition of Strengths in the existing portfolio projects for extension requests

Please note: If there is a delay in creation of Projects and Deals on SANITY, it is because required inputs could be pending with Portfolio/Platforms.

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## ^ Step 0.3: Internal Alignment within BD

Responsibility: Business Operations;

Consulted: BD Heads;

Upon recording of GPC decisions on SANITY, Internal alignment within (Global & Regions) and Business Operations happen which will be facilitated by Global BD Operations Manager. Global BD Operations will share an email written to all BD Heads (Global & Regions) and BD Ops Managers with a list of all endorsements in last GPC meeting and requesting confirmation on

1. if there are other allocations expected but missing from the list

2. which region would take up each of the projects and
3. nomination of BD Managers for each project in a region by the regional head

Reference: [BD Internal Alignment for GPC endorsements.xlsx](#)

Relevant SANITY reports for preparation of this Internal alignment Excel sheet:

1. [Recent GPC BD reactivations | Salesforce](#)
2. [Recent GPC Allocations to BD | Salesforce](#)
3. [Recent GPC Discontinuations for BD | Salesforce](#)
4. [GPC Meetings - This Year | Meetings | Salesforce](#)

## ^ Step 0.4: BD Deal Creation

Responsibility: Business Operations;

Informed: BD Managers;

The screenshot shows the SANITY BD Mgmt interface. The 'Portfolio Project' tab is selected. The 'System Information' section is expanded, showing fields like 'Project & Launch Management', 'SDC / Partner', 'Selected Product Target', 'Legacy BD (no CAR details)', 'PP Record ID (18)', and 'NPV'. The 'Record Type' is set to 'Active Project Global'. The 'PP ID' field is highlighted with a red box and labeled 'PP ID', with the value 'PP-414851' displayed next to it. A red arrow points to the 'PP ID' field.

Unique Identifier for Portfolio Project

Following the internal alignment within BD, Global BD Operations Manager creates the required BD Deals and assigns the ownership of newly created deals to BD Managers recommended by BD Heads.

Please note that SPIRIT (a legacy system used by BD & Portfolio until 2020) is turned off, effective May 2024 and there will be no more SPIRIT IDs generated. PP-ID

(SANITY#) will be used as the unique identifier.

The newly created deal would carry PP-ID as the unique identifier.

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The newly created Deals would commence from the Governance Stage

- [1\) Allocated](#) for new selections with Deal Closure Likelihood 10%
  - [4\) Partner Selected](#) for Territory/Line extensions with Deal Closure Likelihood 50%
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