

# Before Allocation Meeting

## Learning Objectives

After completing this unit, you'll be able to:

- Identify the fields in the MAI and the Opportunity D&D that should be filled in (SGD PMO)
- Creating and giving access to the PSG Document (Portfolio Manager)
- Updating the PSG Document for the evaluation request (Portfolio Manager)

## Introduction

Once the Allocation Meeting Agenda Item has been created and linked to an Allocation meeting, the SGD PMO needs to propose the evaluation function on the Meeting Agenda Item and make sure the relevant information is filled on the Opportunity D&D record.

The Portfolio Manager needs to create and update the PSG Quip document with relevant information related to the Evaluation Request.

Let's dive into each one of these steps.

## Propose evaluation function on MAI (SGD PMO)

Add the proposed function responsible for the evaluation:

1. On the Meeting Agenda Item record, on the “**Details**” tab
2. Under “**Decision Proposed**” add the proposed function responsible for the evaluation
3. Check the required inputs (“**Strength**”/“**Countries**”)
4. Press “**Save**”

Meeting Order: [redacted] Decision Tracker: [redacted] Agenda Item Source Link: [redacted] Meeting Allocation Jan 2021 Owner: [redacted]

**Details** 1 Deliverables Follow-Up Actions

Meeting Agenda Item full name: [redacted]

Agenda Item Source: Opportunity D&D  
This field is calculated upon save

Topic: Evaluation Allocation

Description / Summary: [redacted]

**Details**

Decision Proposed: SDC Ljubljana 2

Decision Final: --None--

Strengths: 100 MG/1 ML; 200 MG/2 ML; 500 MG/5 ML 3

Countries: RU

Net Sales: [redacted]

Cost: 0,00

NPV: [redacted]

Meeting Minutes: [redacted]

Cancel Save 4

Check that relevant information has been filled in.

On the “**Opportunity D&D record**”(1) the SGD PMO will also check that the “**Proposal Lead**” (2), “**Type of Opportunity**”(3), “**Likelihood of Selection**” (4), “**Evaluation Due Date**”(5) and “**Decision date**” (6) fields are filled in.

Opportunity Detail & Diligence 1

+ Follow Sync CDL & Forecast Manage Countries

**Details** Team Feedback Countries Forecasts Quip Selection Process

**Details**

Proposal Lead: Global 2

Urgency: [redacted]

Likelihood of Selection: 4

Evaluation Lead: [redacted]

Evaluation Status: Under evaluation

Type of Opportunity: New Selection 3

Triage start date: 07/08/2020

Evaluation Due Date: 07/09/2020 5

Decision date: 6

If any of this information is either missing or not as expected, you will go to the respective Portfolio Manager and ask for the necessary updates.

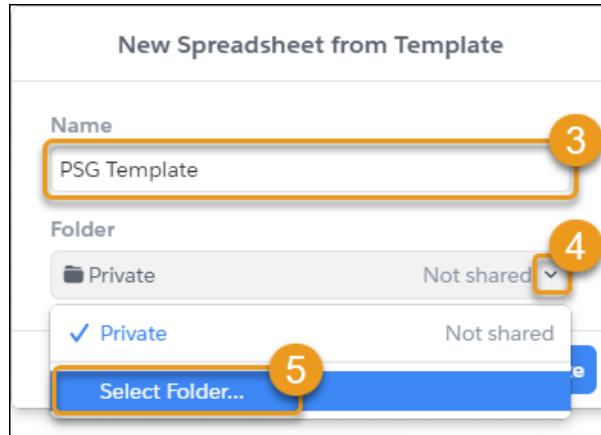
# The PSG Document to hold the evaluation information

## Create the PSG Quip Document from the template (Portfolio Manager)

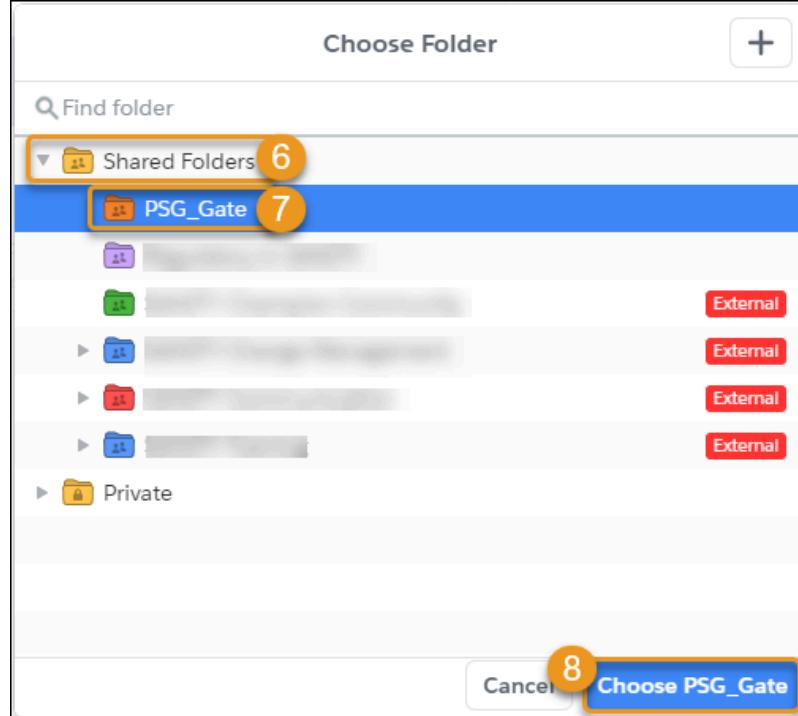
Until the data in the Product Strategy Gate information will be fully maintained in SANITY, some steps need to be done manually to link the PSG Document to the Opp D&D record and allow the team to include their data.

On the "Quip" tab of the Opp D&D record, the Portfolio Manager needs to add the Product Strategy Document for a new evaluation, by following these steps:

1. Login to [Quip](https://quip.com/-/login/salesforce?prompt=login) (<https://quip.com/-/login/salesforce?prompt=login>).
2. Click on this link [Template PSG File](https://novartis.quip.com/jD3dA9YilfSF/PSG-Template?template=1) (<https://novartis.quip.com/jD3dA9YilfSF/PSG-Template?template=1>) and the "**New Spreadsheet from Template**" window will open.
3. Rename the file: change the name and follow the convention: "INN DF PT# PSG" for every evaluation  
(DF = respective dosage form) (In case there is already a file with this name (check first if this doc could be used e.g. in case of SCE) or create a new doc with the name "INN DF PT# \_v1 PSG")
4. On the "Folder" field click the **down arrow**
5. Click on "**Select Folder**"



6. Click on "**Shared Folders**"
7. Select "**PSG\_Gate**"
8. Click "**Choose PSG\_Gate**"



By placing the PSG Document in the "PSG\_Gate" folder, you give writing access to everyone this folder is shared with. So it will be shared with all Portfolio Managers, SGD PMOs, and all PD PMs.

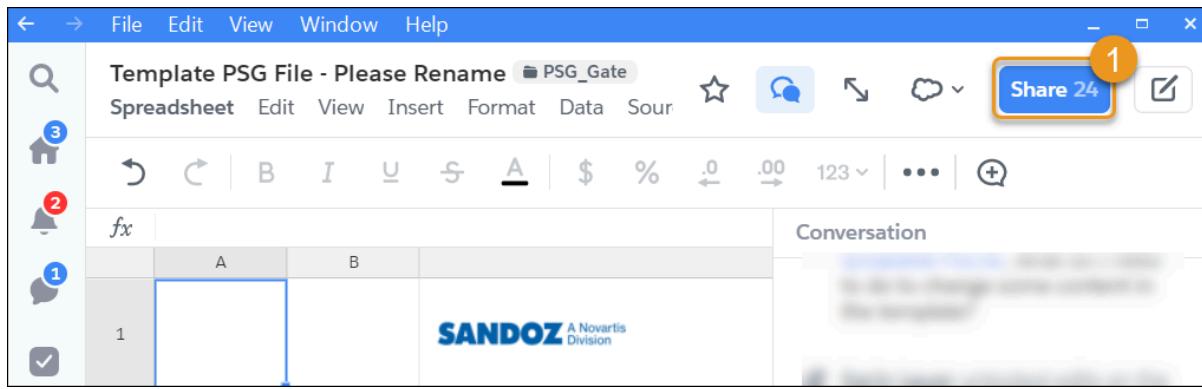
## Give access to the PSG Quip Document (Portfolio Manager)

On the PSG Quip Document, you have just created, you need to give writing and reading access to the relevant people.

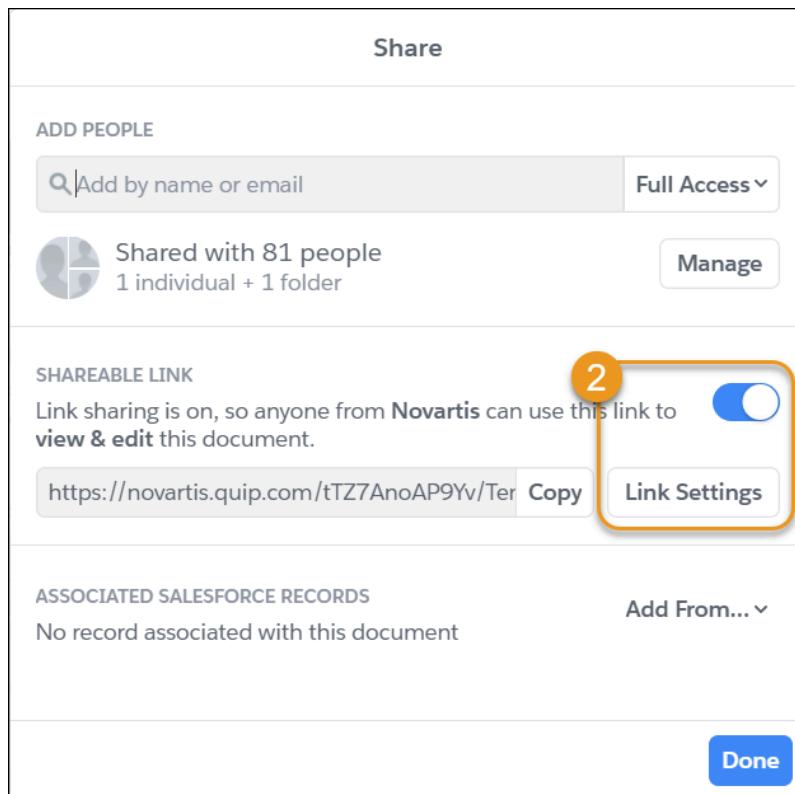
As mentioned above, by placing the PSG Quip Document in the "PSG\_Gate" folder (as you just did) you gave "Write access" to specific people.

To give "**Read access**" to everyone having access to the record, enable link sharing for the file, by following these steps:

1. Click the "**Share**" button on the top right of the page



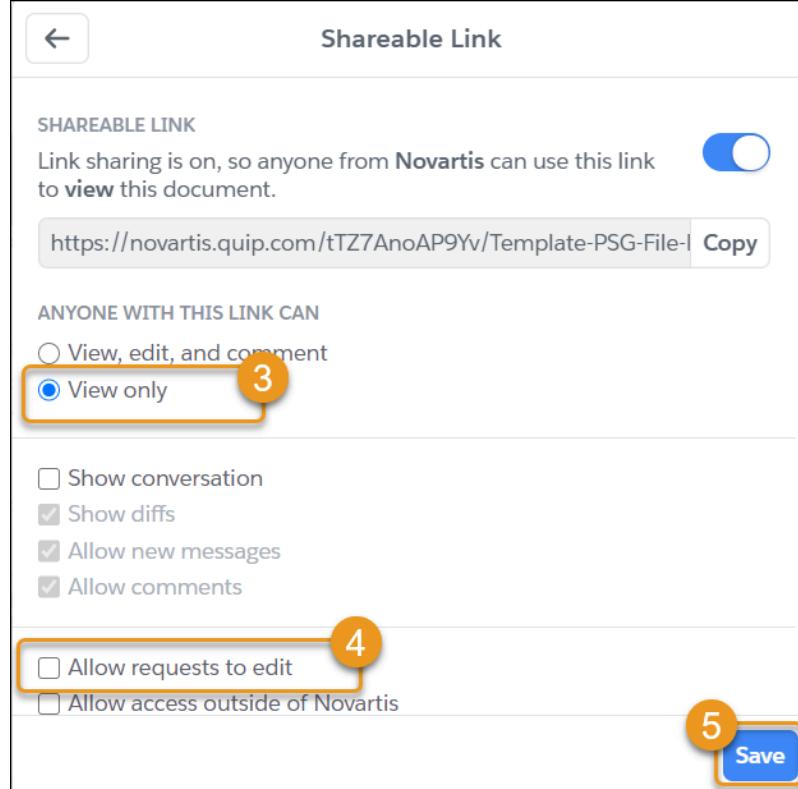
2. Toggle to the right to switch to the "**Shareable Link**" and click on "**Link Settings**"



3. Choose the radio button with "**View only**"

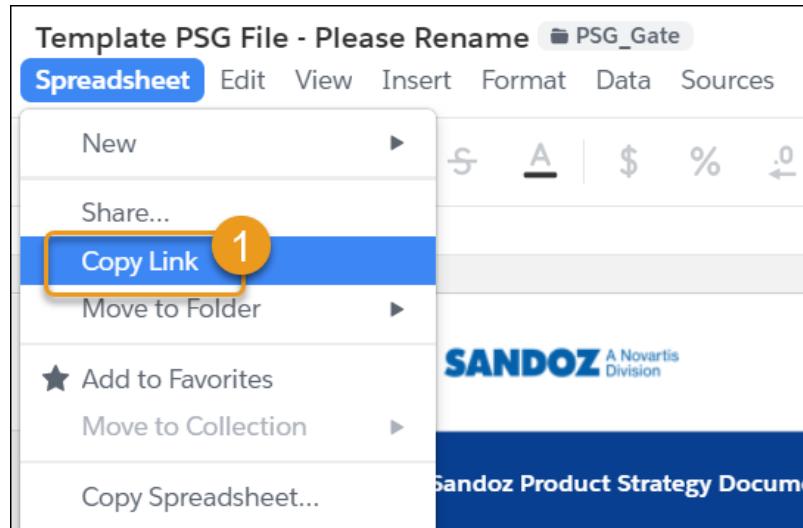
4. Uncheck the box "**Allow requests to edit**"

5. Click "**Save**"



## Link the PSG Document to the Opportunity D&D record in SANITY (Portfolio Manager)

1. Copy the URL of the Quip PSG Document, by clicking "**Copy Link**" under the "**Spreadsheet**" menu



2. Navigate back to the **Opp D&D** record
3. Click on the "**Quip**" page
4. Under "**Documents**" click "**Choose document**"

The screenshot shows the 'Opportunity Detail & Diligence' page. At the top, there are fields for 'Record Type' (New Selection), 'Evaluation Status' (Under evaluation), 'Feedback Average' (0,0), and 'Product & Project(s) Links' (Product: [redacted]). Below these are two green navigation bars with arrows. Underneath is a navigation bar with tabs: Details, Team, Feedback, Countries, Forecasts, Quip (which is highlighted with a yellow circle containing the number 3), and Selection Process. The main content area is titled 'Associated Documents' and shows a section for 'Document'. A placeholder image of a hand holding a landscape is displayed, with the text 'Choose a Quip document to add to this component, or create a new one.' Below it are two buttons: 'Choose Document' (highlighted with a yellow circle containing the number 4) and 'New Document'.

5. Under “**Add by URL**”

6. Paste the copied URL

7. Click “**Update**”

The dialog box is titled 'Link Quip Document'. It has a search bar and a button labeled 'Add by URL' (highlighted with a yellow circle containing the number 5). Below is a field labeled 'Quip Document URL' containing the value 'https://novartis.quip.com/tTz7AuoAP9Yv' (highlighted with a yellow circle containing the number 6). At the bottom are 'Cancel' and 'Update' buttons, with 'Update' highlighted with a yellow circle containing the number 7.

8. You will see it in the “**Spreadsheet**” section (8.a), a link to it in the “**Associated Documents**” section (8.b) as well as in the “**Files**” section (8.c)

The screenshot shows the Opportunity Detail & Diligence page. At the top, there are tabs for Record Type (New Selection), Evaluation Status (Under evaluation), Feedback Average (0.0), Product & Project(s) Links (Product: [redacted]), and Originator Product Target ([redacted]). Below these are status indicators: Declined, On-hold, Active, Under evaluation (highlighted in blue), and Selected. A navigation bar below includes Details, Team, Feedback, Countries, Forecasts, Quip (highlighted in blue), and More. The main content area has a tab bar with Associated Documents (sorted by last modified), Quip (highlighted in blue), and More. The Associated Documents section shows Directly Linked (1) and Linked from Related Records, with a Spreadsheet item. The Quip section shows a spreadsheet editor with a Sandoz logo. The More section shows Forecast Details (Forecast First Launch Year, Forecast Sales (Current Total), Forecast Sales (Current Total L+5), Forecast Sales (Weighted Cnt Total L+5)) and Files (1) (Quip). A yellow circle labeled '8' points to the Forecast Details section.



The file will now be visible also on any Opportunity Assessment record linked from the Opp D&D. It can also be further shared for editing directly in Quip - that might be individual sharing to PD managers.

## Adding more information in the PSG Document for the Evaluation Request (Portfolio Manager)

Now, the Portfolio Manager will need to include the project-specific information in the PSG Document.

In general, all fields with "**Portfolio**" in the "**Resp function**" column (5) on the right side of the Quip doc, should be completed.

You will find information to complete on the following tabs:

1. **Product General**
2. **Sandoz Trade dress**
3. **Timelines Supply Chain**
4. **TPC**

PSG Template → References

Spreadsheet Edit View Insert Format Data Sources

Comment

=Product Strategy Summary!A1

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Target product profile																	
2	General product info	General	EU	US	JP	CA	BR	RU	CN	AU	MX	TH	TR	TW	ZA	Comments / Help	Earliest PSG 5	
3	Product status															To be available	Responsible function	
4	Product Class															NCE, ND, SCE, Local differentiated: if the same for all countries, put only once	1 GPM	
5	Sub-Product Type																1 GPM	
6	Scope selected			✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	1 GPM	
7	Product Source			✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	1 GPM	
8	Launch Type			✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	1 GPM	
9	TP ID																1 GPM	
10	PJ ID																1 GPM	
11	API															Including salt name	1 GPM	
12	Dosage Form																1 GPM	
13	Strength																1 GPM	
14	Trade dress Special requirements (if relevant)															Only if something significantly different than original, otherwise details defined separately by TD sub-process and documents	1 GPM	
15	TA	✓															1 GPM	
16	Portfolio segments(s)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	For PGS1: State in column "General" For PGS1: State in scope-specific	1 GPM	
17	Go to market model															For PGS1: include general comment in column "General"	1 GPM	
18	Expected competition															For PGS1: include general comment in column "General"	1 GPM	
19	Responsible GPM															Generic penetration	1 GPM	
20																		

... + Instructions Product Strategy Summary Product General 1 Sandoz Trade dress 2 Development and Technology 3 Timelines & Supply Chain Clinical TPCs 4 Development Budget Dev\_Budg\_selection Selection ou

In case the target TPC or forecast volumes are not known yet, please include them during the evaluation on availability before finalization of the evaluation.