

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 Agenda Items

Meeting Order Decision Tracker Agenda Item Source Link Meeting Allocation Jan 2021 Owner

Details 1 Deliverables Follow-Up Actions

Meeting Agenda Item full name

Agenda Item Source 1 Opportunity D&D
This field is calculated upon save

Topic 1 Evaluation Allocation
[View all dependencies](#)

Description / Summary 1

Meeting 1 Allocation Jan 2021 X

Meeting Date 1 01.01.2021
This field is calculated upon save

Agenda Item Owner 1 Jin X

Details

Decision Proposed 1 SDC Ljubljana 2
[View all dependencies](#)

Decision Final 1 --None--
[View all dependencies](#)

Net Sales 1

Cost 1 0,00

NPV 1

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

Countries 1 RU

Meeting Minutes 1

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 Country

Details Team Feedback Countries Forecasts Quip Selection Process

Details

Proposal Lead 1 Global 2

Urgency 1

Likelihood of Selection 1 4

Evaluation Lead 1

Evaluation Status 1 Under evaluation

Type of Opportunity 1 New Selection 3

Triage start date 07/08/2020

Evaluation Due Date 1 07/09/2020 5

Decision date 1 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.

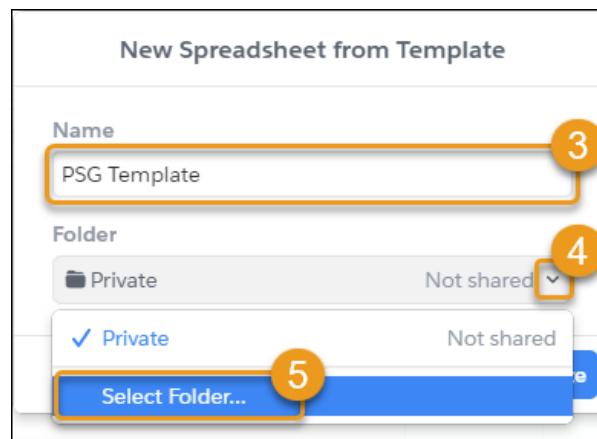
The PSG Document to hold the evaluation information

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

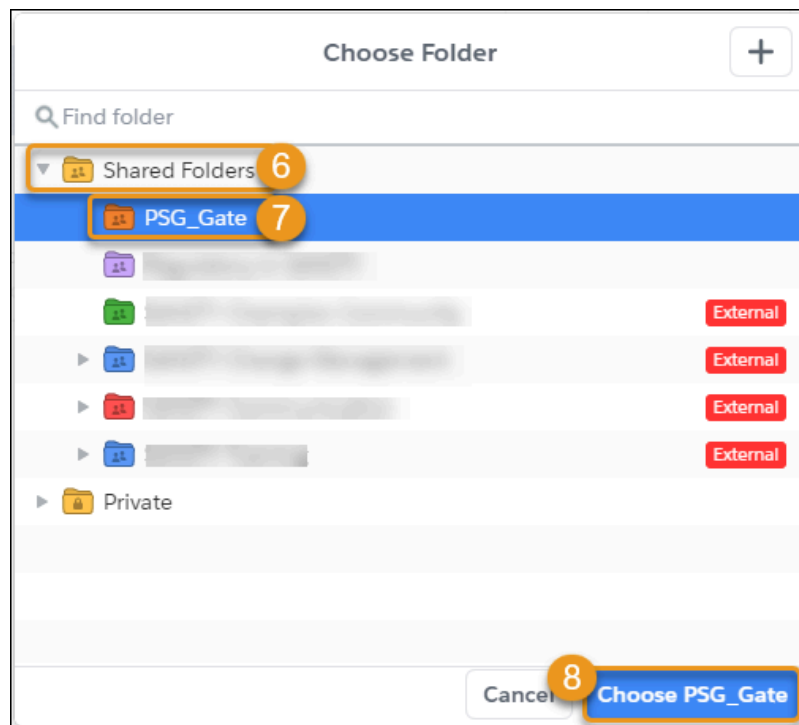
Until the data in the Product Strategy Gate information will be fully maintained in SANITY, some steps need to be done manually to link the PSG Document to the Opp D&D record and allow the team to include their data.

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>).
2. Click on this link Template PSG File (<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.

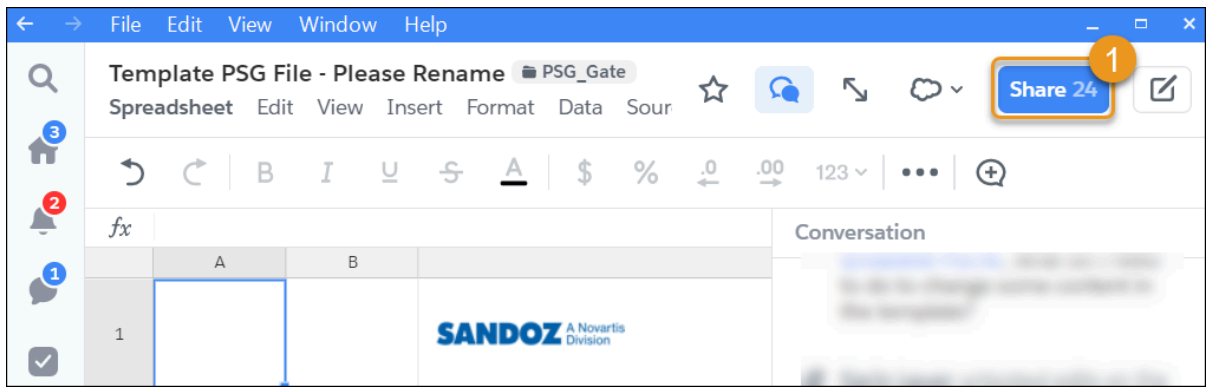
Give access to the PSG Quip Document (Portfolio Manager)

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

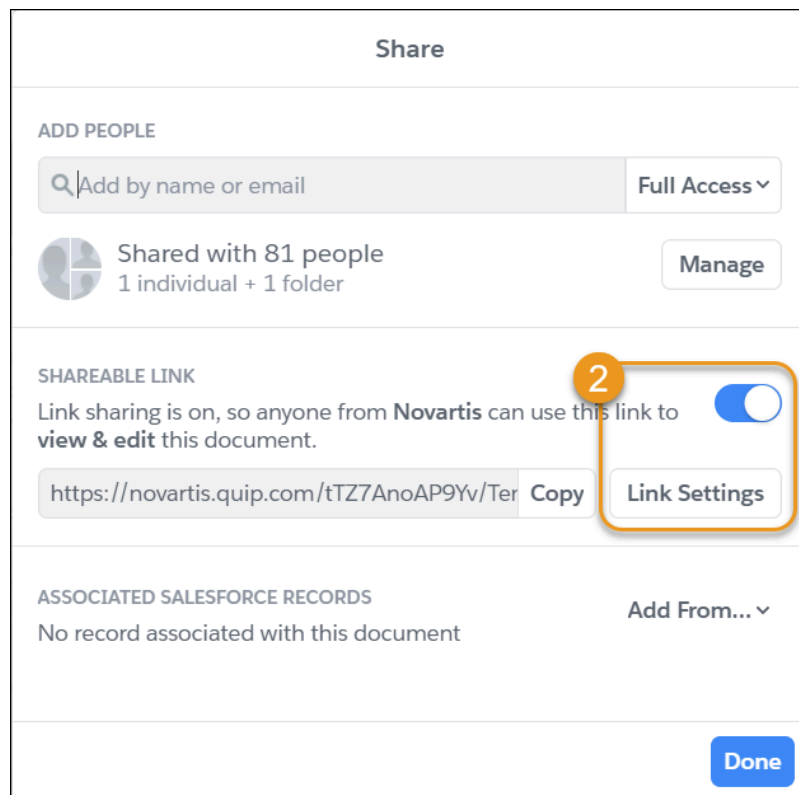
As mentioned above, by placing the PSG Quip Document in the "PSG_Gate" folder (as you just did) you gave "Write access" to specific people.

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



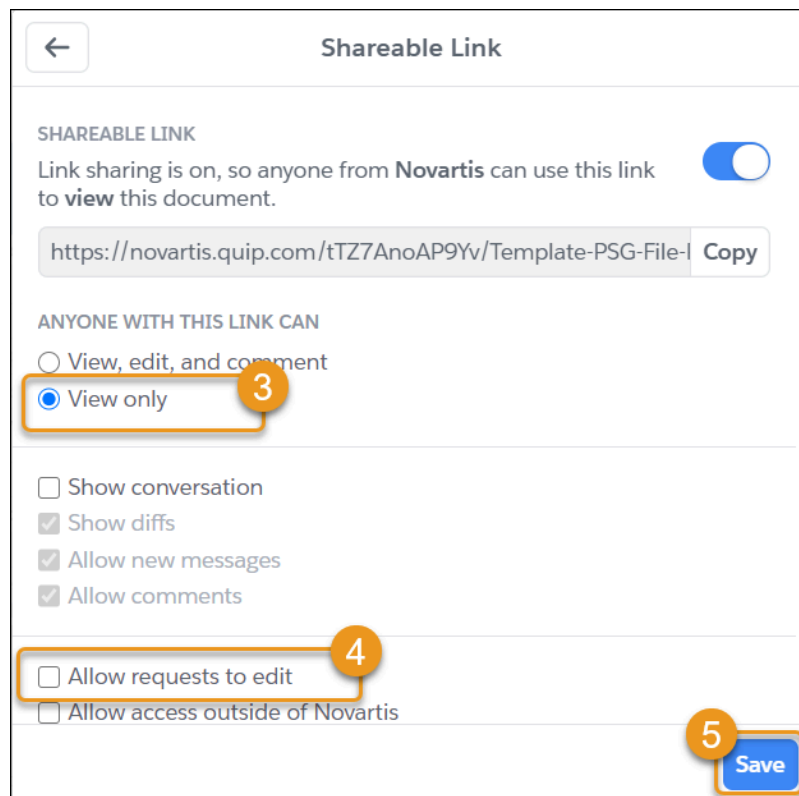
2. Toggle to the right to switch to the **"Shareable Link"** and click on **"Link Settings"**



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

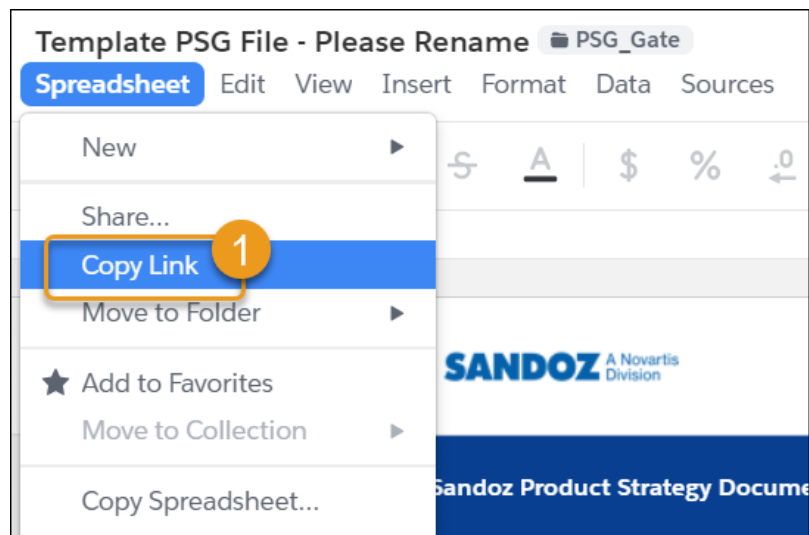
4. Uncheck the box **"Allow requests to edit"**

5. Click **"Save"**

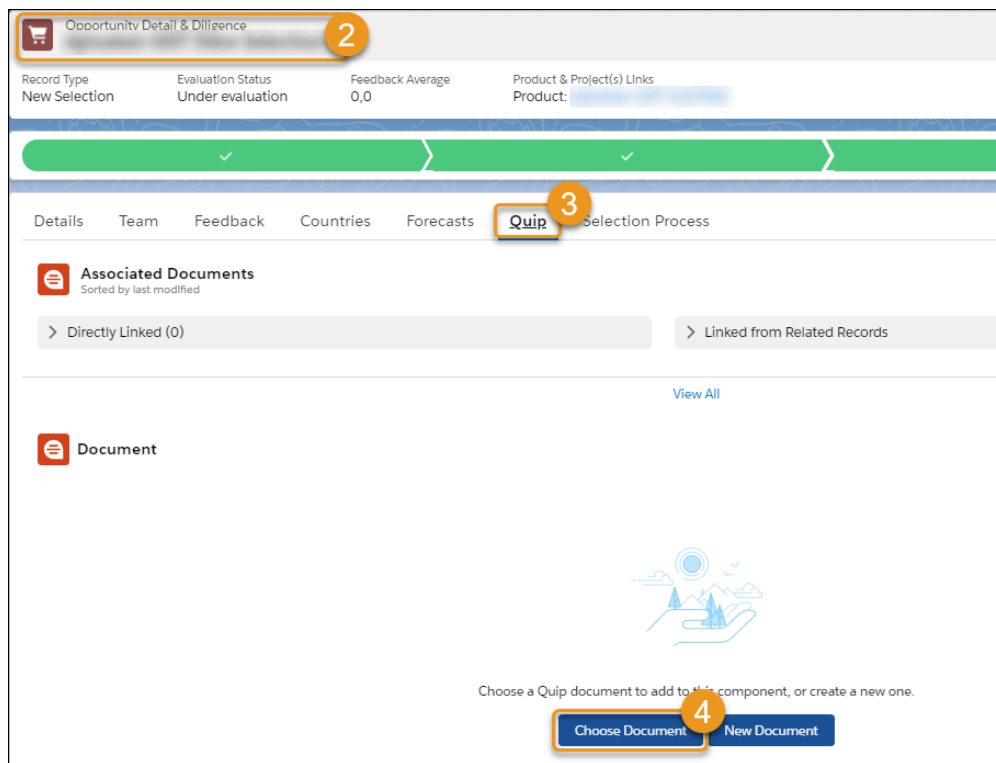


Link the PSG Document to the Opportunity D&D record in SANITY (Portfolio Manager)

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**"

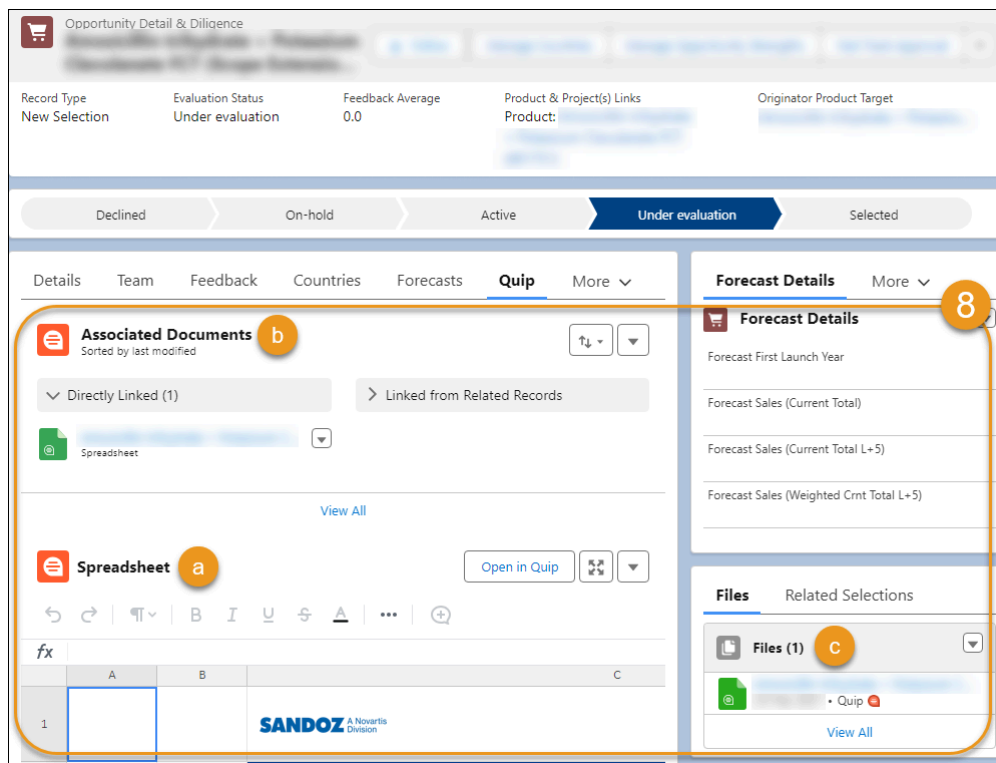


5. Under “**Add by URL**”

6. Paste the copied URL

7. Click “**Update**”

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 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																	
Spreadsheet Edit View Insert Format Data Sources																	
fx =Product Strategy Summary!A1																	
1	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
2	Target product profile																
3	General product info	General	EU	US	JP	CA	BR	RU	CN	AU	MX	TH	TR	TW	ZA	Comments / Help	Earliest PS to be available
4	Product status																Resp turn
5	Product Class															NCE, NP, SCE, LCM/differentiated: if the same for all countries, put only once	1
6	Sub-Product Type																GPIM
7	Scope selected																GPIM
8	Product Source															IHD, BD, Dual or Co-Development	1
9	Launch Type															Defined at selection, not changed afterwards	GPIM
10	TP ID																GPIM
11	PJ ID																GPIM
12	API															Including salt name	GPIM
13	Dosage Form																GPIM
14	Strength																GPIM
15	Trade dress Special requirements (if relevant)															Only if something significantly different than originator, otherwise details defined separately by TD sub-process and documents	GPIM
16	TA																GPIM
17	Portfolio segments(s)															For P3 only: state in column "General" For PSG2+3: State in scope-specific	GPIM
18	Go to market model															For PSG1, include general comment in column "General"	GPIM
19	Expected competition															For PSG1, include general comment in column "General"	GPIM
20	Responsible GPIM															Generin: penetration	GPIM

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.