

. Allocated



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^ Step 1.1: Review allocation details

Responsibility: BD Manager;
Consulted: Portfolio & Business Operations;

Upon assignment of a BD Deal in a BD Manager's ownership, BD Manager is expected to review on SANITY the below details and reach out to Portfolio Manager or BD Operations Manager for missing/conflicting information.

1. Countries in BD Deal

- a. All countries in scope of the parent Portfolio Project will be inherited upon creation of a new deal.
- b. Please review the individual countries and exclude any country that is not part of the deal scope (if they will be picked up as a Territory Extension by another region/same region later)
- c. If your deal is a global focus deal (with roughly 80+ countries), please reach out to Global BD Operations Manager, who has the privileges to update the 'Worldwide Deal' Checkbox. Upon ticking this, the deal would be considered worldwide, and you would see 'Countries excluded in deal' instead of 'Countries in Deal' to allow you mark only the exceptions in territories easily.

2. Net Sales Value (Reportable)

- a. If your Net Sales Value (Reportable) is USD 0,00, you don't have any Forecasts linked to the Deal, which means you miss Selection/Investment Forecasts. All projects allocated to BD&L at GPC should possess Selection Forecasts. If you see them missing, please follow up with Business Operations or in special cases, [Request Forecast Update](#).

3. ComOps Region Reportable

4. Product Class

5. CCO Platform,

- a. Please reach out to your BD Operations Manager for any changes in any of these.

The screenshot displays the CCO Platform interface. At the top, there is a navigation bar with buttons: + Follow, Edit, Clone, Delete, Create CAR, Create Agreement, Request Forecast Update, and Cancel Forecast Requests. Below this, a header section contains fields: CCO Platform Standard Gx (highlighted with a red box and a red circle with the number 3), Portfolio Project Strengths, Net Sales Value (Reportable) USD 34,000.010,00 (highlighted with a red box and a red circle with the number 2), and Agreement Signature Month and Year None. A progress bar below the header shows five stages: 1) Allocated (active), 2) Identification, 3) Early Evaluation, 4) Partner Selected, and 5) Confirmatory Evaluation. The main content area has tabs: Estimates, Forecasts, SPC & Agreement, Scouting, and Escalations. Below the tabs is a table of deal details:

BD Manager	
Deal Partner	NA
ComOps Region Reportable	US
Deal Type	Late In-Licensing deals
SM BD Relevance	Yes
SIRC Relevance	No
#Countries in Deal	1
Deal Annotation (Project /Basket Name)	

On the right side, there is a sidebar. At the top, it says "This BD Deal is NOT a" followed by "Reasons -" and "> BD Deal - Naloxone LO" and ">> Deal closure like". Below this is a section titled "Countries in D" with a sub-section "BD Deal Process Countri" and an "Edit" link. Under "Edit", there is a field "Deal Country Output" with a dropdown arrow, and a field "NAmer(1) : US" (highlighted with a red box and a red circle with the number 1). Below this is a field "Countries in BD Deal" with a dropdown arrow, and a field "NAmer:" with a dropdown arrow showing "United States (I". At the bottom of the sidebar, there is a link ">>> Forecasts".

^ Step 1.2: Update basic deal information

Responsibility: BD Manager;
Consulted: Business Operations;

Update

1. **Countries in Deal** (if required at all stages during the Deal Execution to depict only the exact list of countries in scope of the negotiation/execution /signature)
2. **Deal Type** (Refer to [BD Deal Types](#)) for guidelines (After finding a partnership opportunity, if there is a change on the deal type, you could still update this field)
3. **Backup Deal** as Yes/No
 - a. For projects allocated to BD&L as a backup (probably for high risk in-house development projects), please ensure that the 'Backup Deal' is marked 'Yes'.

(Also, note that Backup Deals would be excluded from the Pipeline Value Calculations)

4. Territory Extension as Yes/No

5. Line Extension as Yes/No

6. Deal Annotation as the code-name of the project or the name of the basket in case of a backup deal.

a. SANITY supports product specific data framework, which is not fully compatible for handling basket deals. So, for basket deals, please update the name of the basket consistently in the 'Deal Annotation' fields of all the individual BD Deal records on SANITY (product specific) encompassed in the basket)

b. For deals with no basket/code-names, please leave this field empty.

7. Deal Timeline

a. Update Estimated dates for the 3 critical stage-gates of the deal execution: Partner Selection (PSB), Deal Approval (CAR & DRB) and Agreement Signature. *(Please keep these 3 dates updated at all times to manage the expectations of management and partner business functions to plan accordingly)*

8. Reporting Information

a. The 4 text fields as below could carry 255 characters in each. Please make use of them to record verbal description of the reason for license, key risks, status, next steps and any additional information. Please practice updating them whenever you anticipate any changes to these reporting information.

b. To record verbal content beyond 255 characters or a summary of the BD Project, please make use of 'Comments' field under the 'Long Summary' section for record keeping or documentation purposes. Please beware that this cannot be used in SANITY reports/dashboards as they are beyond 255 characters.

Important note: For projects with launches planned after 3 years or for projects which are not time critical, and you are not looking for any partnership opportunities, please leave the Governance Stage in '**1) Allocated**' and Deal Closure Likelihood % as '**10%**'. This would help SANITY consider such deals not active and exclude from **Pipeline value calculations** and **data quality tracking initiatives**.

For projects, you've started actively searching for potential partners, please update the 'Governance stage' to '**2) Identification**' and Deal Closure Likelihood % to '**15%**'

or '10%' depending on whether you want the deal to be reported in the Pipeline or not.

