

Scientific Exchange Requests - Process Flow

The following process must be followed for the use of consultants for Scientific Exchanges.

Request Process	
1.	Regional Manager (RM) / Field Marketing Specialist (FMS) / Territory Manager (TM) to complete Scientific Exchange Request Form & submit to Area Vice President (AVP – Tom, Bill) or National Sales Manager (NSM - Chris)
2.	Tom/Bill/Chris to review request, indicate preliminary approval of event and budget & submit form to National Director of Surgeon Relationships (Gary) & Director of Marketing, Americas (Dana)
3.	Gary to review request for consultant usage and verify availability of consultant, confirm an event date, approve event & submit form to Dana
4.	Dana to complete an internal review by working with the Contracts Department to ensure consultant has an active contract for the requested date(s) and that the contract covers the scope of the request, estimate event costs and consultant fees
5.	Dana to provide form to Executive Vice President of Sales (EVP – Bob) / National Sales Manager Canada (NSM – Chris Erasmus) for final approval
6.	Bob/Chris to review Scientific Exchange Request for approval & provide form back to Dana
7.	Dana to notify Gary, Tom/Bill/Chris and event requestor if event is approved or not approved. If approved, Dana will send sign-in sheet for event, ask if event invitation is needed & inquire if any additional items are required for event
8.	Dana to communicate with consultant prior to event by sending clinical presentation (if needed), invoice template & requesting PDF of work proof
9.	Dana to submit approved form to Compliance (Kathleen). Kathleen to receive, review & approve work proof 4 weeks prior to event
10.	If an invitation is requested, Marketing will draft & submit to compliance for review prior to electronic distribution or printing
11.	Gary to work with consultant and/or office staff to arrange travel and logistics for event
12.	Marketing to send requested items (speaker kit, projector, literature, etc.) to event
13.	Requestor or Tom/Bill/Chris to provide sign-in sheet to Dana & Gary following event
14.	Tom/Bill/Chris to collect ROI information following event. Collect data regarding specific surgeons who attended event with hospital affiliations, # cases with \$ per case for product usage 1 month before & 3 months after event & compare to previous or average use. Provide analysis to Gary on a timely basis
15.	Gary to hold quarterly meetings to discuss/review events with Dana, Tom/Bill/Chris
16.	Gary to analyze & regulate use of consultants utilizing Scientific Exchange Event tracking spreadsheet for 2019