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 & submit form to National Director of Surgeon Relationships (Gary)
3. Gary to review request, indicate if event is budgeted, recommend a consultant for the event, ensure consultant's contract is current on the requested date & covers scope of request, & submit form to Director of Marketing, Americas (Dana)
4. Dana to estimate event costs & fees for recommended consultant & provide form to Senior Vice President of Sales (SVP – Bob) / Vice President of Sales (VP - Vernon) for approval
5. Bob/Vernon to review Scientific Exchange Request for approval & provide form back to Dana
6. Dana to notify Gary & Tom/Bill/Chris if event is approved or not approved
7. Gary to communicate with consultant or office staff to confirm availability for event
8. Gary to communicate with consultant prior to event by sending clinical presentation & invoice template & requesting PDF of work proof
9. Dana to contact event requestor & Tom/Bill/Chris to send sign-in sheet for event, ask if event invitation is needed & inquire if any additional items are required for event
10. Dana to submit approved form to Compliance (Kathleen). Kathleen to receive, review & approve work proof 2 weeks prior to event
11. If an invitation is requested, Marketing will draft & submit to compliance for review prior to electronic distribution or printing
12. Marketing to send Speaker kit & requested items 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
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 2018

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