



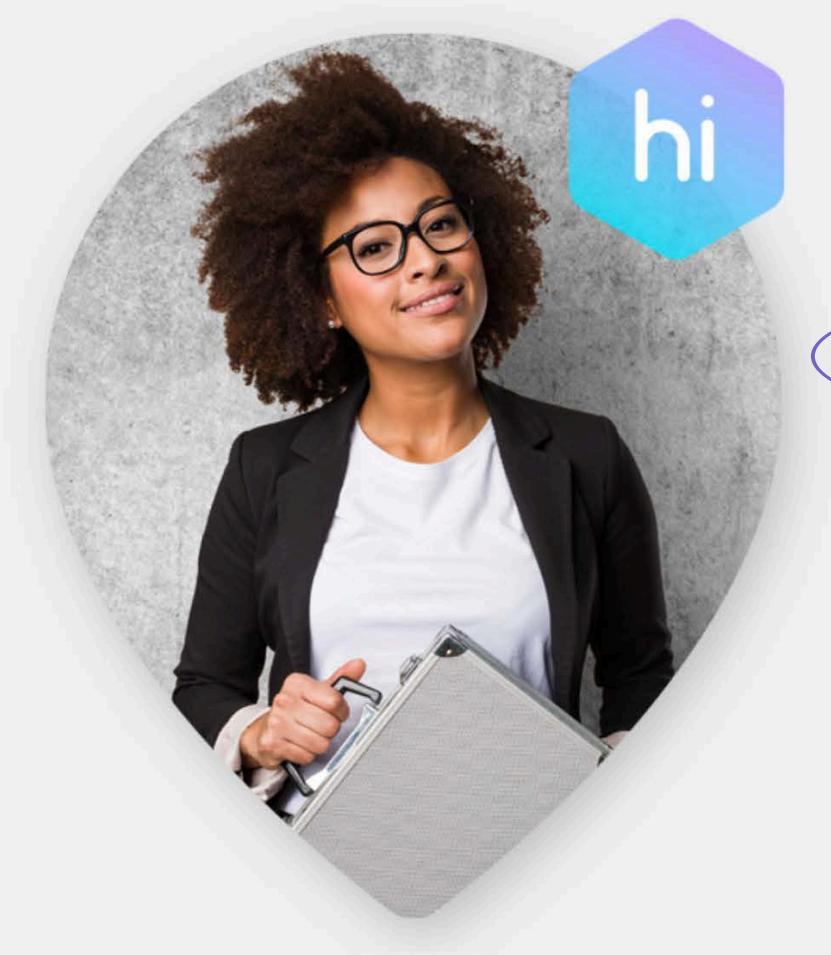
How to
appropriately

Challenge

The Status Quo

Fred Marshall, CEO | Founder

quantum[®]



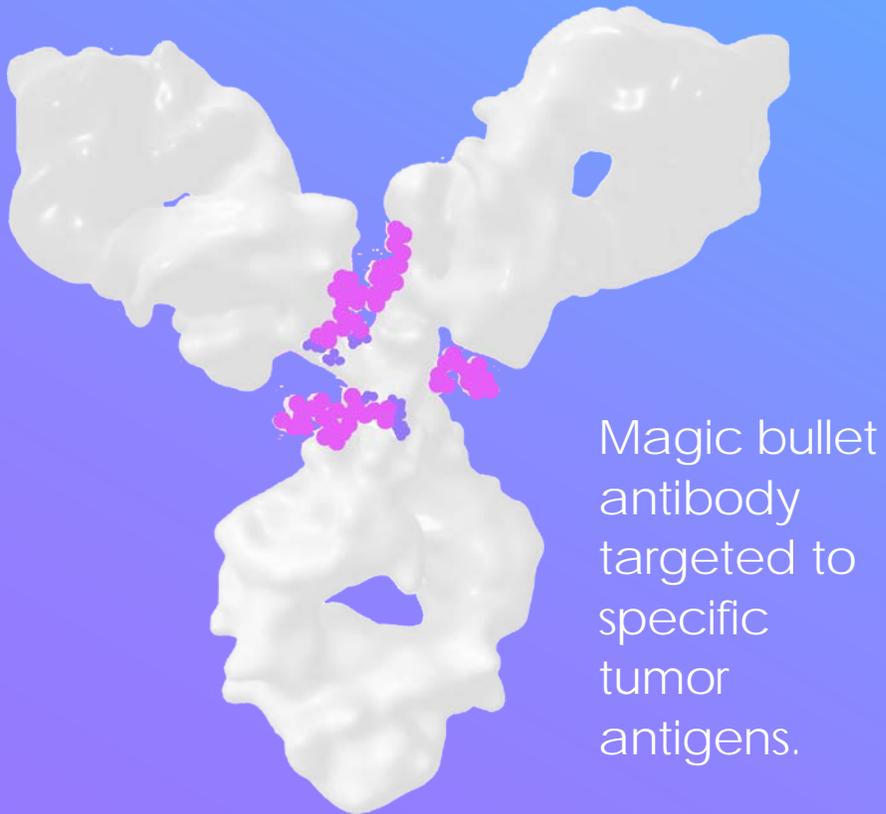
Sales Force Effectiveness **Delivered**

Quantum Delivers Research-based Pharmaceutical Sales Training
Proven to Move the Needle in Highly Competitive Markets.

quantum®

Smallest Client – Magic Bullet

Helped Commercialize and Launch World's First "Magic Bullet" Monoclonal Antibody -Drug-Conjugate Targeted to Specific Tumor Antigens. Designed Content Based on Quantum's Research into the Behavioral Differences Between Top and Middle Performers Selling Biologics in Hematology



- Customer Engagement Model
- Initial Sales Training
- Support Launch
- Core Curriculum
- New Hire Profiles

Most Famous Client

Designed Apple's Customer Engagement Model, Coaching and Pull -Through Process, and Provided In-Depth Skill Development in Behaviors that Move the Needle Inside the Apple Ecosystem

- Customer Engagement Model
- Coaching and Pull-through Process
- In-Depth Skill Development

Trusted by Market Leaders Large and Small

Genentech

 Biogen.

 GILEAD

Janssen 



AMGEN

 NOVARTIS

AstraZeneca 


novo nordisk

 **ATI**
PHYSICAL THERAPY

INTUITIVE
SURGICAL®

SYNERGY
PHARMACEUTICALS

 SeattleGenetics®

 Boehringer
Ingelheim

 Santen

 ACTELION

 Lundbeck 

 pharmacyclics®

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Diabetes Care

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 veru
HEALTHCARE

 Roche
Diagnostics

 Bristol-Myers Squibb

 MERCK

 quantum®

Congratulations to Our Clients

LTEN EXCELLENCE AWARD FINALISTS

Training for Change

SUMMARY
Expanding growth of a product in a highly competitive space with multiple indications, while also expanding the salesforce, is no easy feat. This initiative focused on empowering sales representatives, district managers, and product trainers to grow the brand by showing the sales force how to appropriately challenge current treatment paradigms and HCP thinking, using a new customer engagement model. What made the initiative successful was the seamless integration of brand strategy, message platform, and customer engagement training. The new customer engagement model became a key part of the brand strategy.

SITUATION ANALYSIS
Our challenge was developing a customer engagement model that was intuitive and impactful for 5 different indications (GVHD, CLL, MCL, MZL, WM), while keeping the needs of the brand top of mind. Our goal? To roll out a customer engagement model that:

- Integrated marketing strategy,
- Changed HCP prescribing behavior, and
- Was effective for sales representatives to use, regardless of their focused indication.

 Our initiative was to help the salesforce move the needle by disrupting the Status Quo level setting with healthcare providers around the disease state first before pivoting to product discussions. We partnered with Quantum Learning, Inc. to create a research-based, customized, customer engagement model that simplified the process of engaging customers in meaningful ways that brought the HCP to the tipping point of change.

METHODS/APPROACH
Data from Quintiles IMS (now IQVIA) helped us determine which behavioral drivers were key in helping the sales force push ahead of their competitors in a way that was beneficial for not only the physicians, but also for the practice and patients. With this in mind, we partnered with Quantum Learning, Inc. to co-design a simple yet robust customer engagement model that would empower the salesforce to grow the brand by appropriately disrupting the Status Quo. This included a customer engagement model with 4 simple steps that were supported by selling behaviors, clinical data, and marketing messages. Because of the proprietary nature of the model we can only show symbols of what the model covered below:

EVALUATION AND CONCLUSIONS
The sales training team partnered closely (weekly touchpoints) with each of the brand teams and sales leaders to truly integrate the message platform for each indication into the new Customer Engagement Model. This helped to create a clear line of sight between brand strategy and face-to-face execution with HCPs. The results?
 A significant lift in Market Share, and significantly improved performance on Top Tier Drivers of intent to prescribe vs. competitors, as measured from the physician's point of view (see Figure 1).
 Lessons learned: Change in behavior, to be sustainable, must be systematically reinforced, coached, and pulled through. It is essential to make sure the district manager and sales representatives continue to execute the behaviors that led to such great results by designing your pull-through strategy from the beginning.

Figure 1: Key Results
Significant improvement in performance on Top Tier Driver metrics. PCYC sales representatives went from 2 of 7 Top Tier Drivers in the Green Zone (PCYC significantly higher than Comparator) to 6 of 7 Top Tier Drivers in the Green Zone.

PCYC TEAM
Claudia Bujold
Genevieve Caron
Michael Hall

pharmacyclics

All Star Team

Genentech

CMG TRAINING & DEVELOPMENT

SUMMARY
A holistic training strategy focused on...

- 2 specific selling skills over the course of a year to drive behavior change to achieve business results
- Advancing the coaching skills of the DMs to ensure consistent reinforcement of selling skills to drive behavior change

KEY
CS: Clinical Specialist
DM: Division Manager
FBT: Field Based Trainer
FCR: Field Coaching Report

METHODS/APPROACH
DM Feedback and Coaching: Identified Need Through 360 Survey, Reinforced Through Application Exercises at Workshops, Application Through Utilization of FCR in Workshops, Participation & Accountability at Every Level.
CS Insightful Questioning and Gaining Commitment: 3 National Live Workshops, Consistent Reinforcement Training, Innovative Evolving Application of Skills, Elevating FBT Role to Gain Buy-In.
 In partnership with Quantum Learning.

SITUATION ANALYSIS
The team identified a need through market research, DM observations, and a third-party field selling skills analysis to:

- Move from a one-and-done approach to a holistic training approach
- Measure behavioral change
- Ensure reinforcement was happening through on-the-job coaching

Asked Insightful Questions

Before	After
33.2%	43%

 % of Physicians Who Strongly Agree the Clinical Specialist Consistently Enhanced the Behavior

Gained Commitment

Before	After
21%	29%

 % of Physicians Who Strongly Agree the Clinical Specialist Consistently Enhanced the Behavior

EVALUATION AND CONCLUSION
Insightful Questioning: With regards to the Clinical Specialist's ability to ask insightful questions regarding practice needs, clinical data and/or patient needs in a way that lead to a meaningful discussion increased from 38 to 43 percent.
Gaining Commitment: Percentage of customers who rated the Clinical Specialist at the highest level (strongly agree/very strongly agree) with regards to their ability to gain commitment for appropriate patients increased from 21 to 29 percent.
 This dual focus on developing 2 specific selling skills and extensive work on coaching & feedback into training for the managers resulted in the ability to drive behavior change that led to success for the team both qualitatively, in customer feedback, and quantitatively, in meeting business results.

TEAM MEMBERS
Mark Jarvis, Associate Director of Training - Genentech Immunology & Ophthalmology (GIO)
Kristi Ciro-Baumann, Principal Training Manager, GIO
Michelle Soto, Manager, GIO LUCENTIS/XOLAIR Training Teams
Vince Cavaliere, Senior Trainer
Clare Killeen, Senior Trainer
Julie Walsh, Senior Training Coordinator



Our Mantra

Have Fun. Keep it Simple. Make the Needle.

TRAINED
>100,000
REPS

71 PRODUCT
LAUNCHES



Core Values

Care Deeply. Change Lives. Invent Tomorrow.



How to
appropriately

Challenge

The Status Quo

quantum[®]

What's the problem?

**Sales are below expectations
because the HCP is stuck in both
mindset and behavior**

They've got:

No Motivation to Change ...

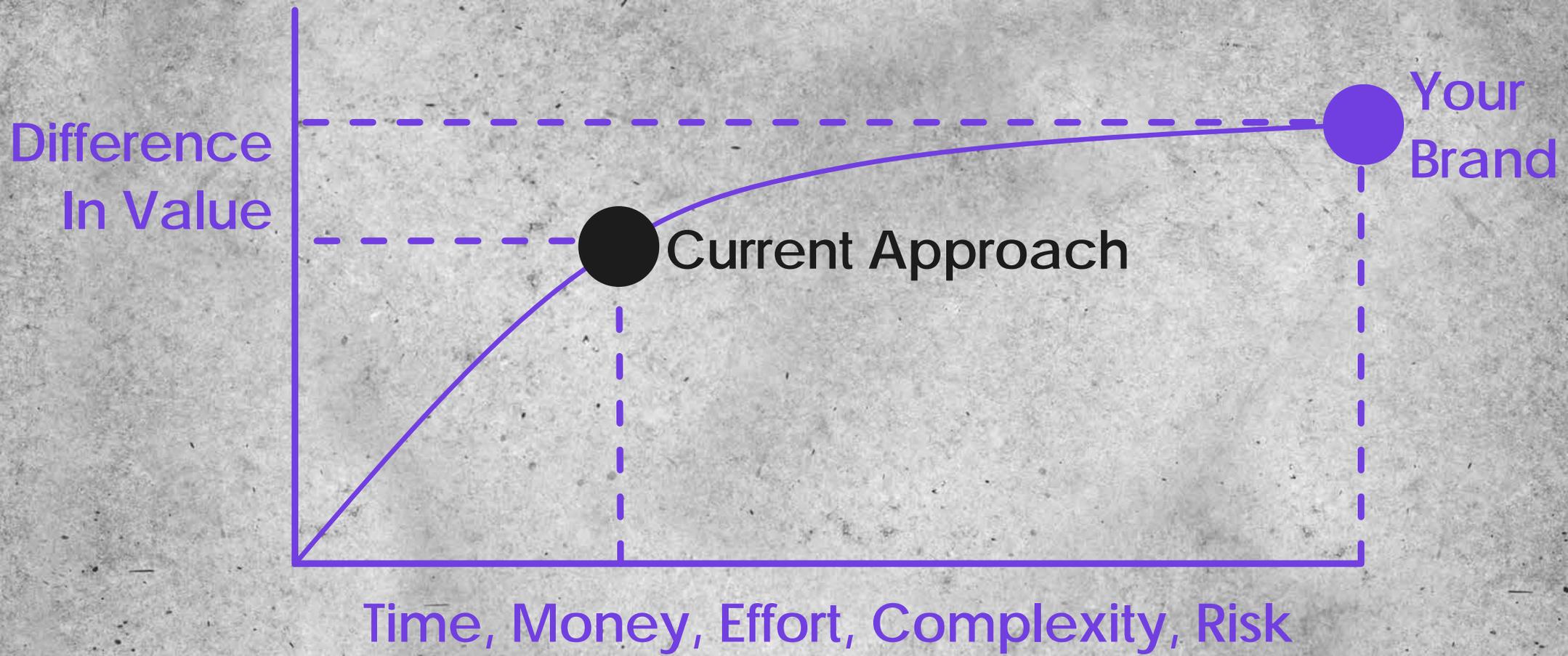
"Meh ..."

They don't see your brand as:

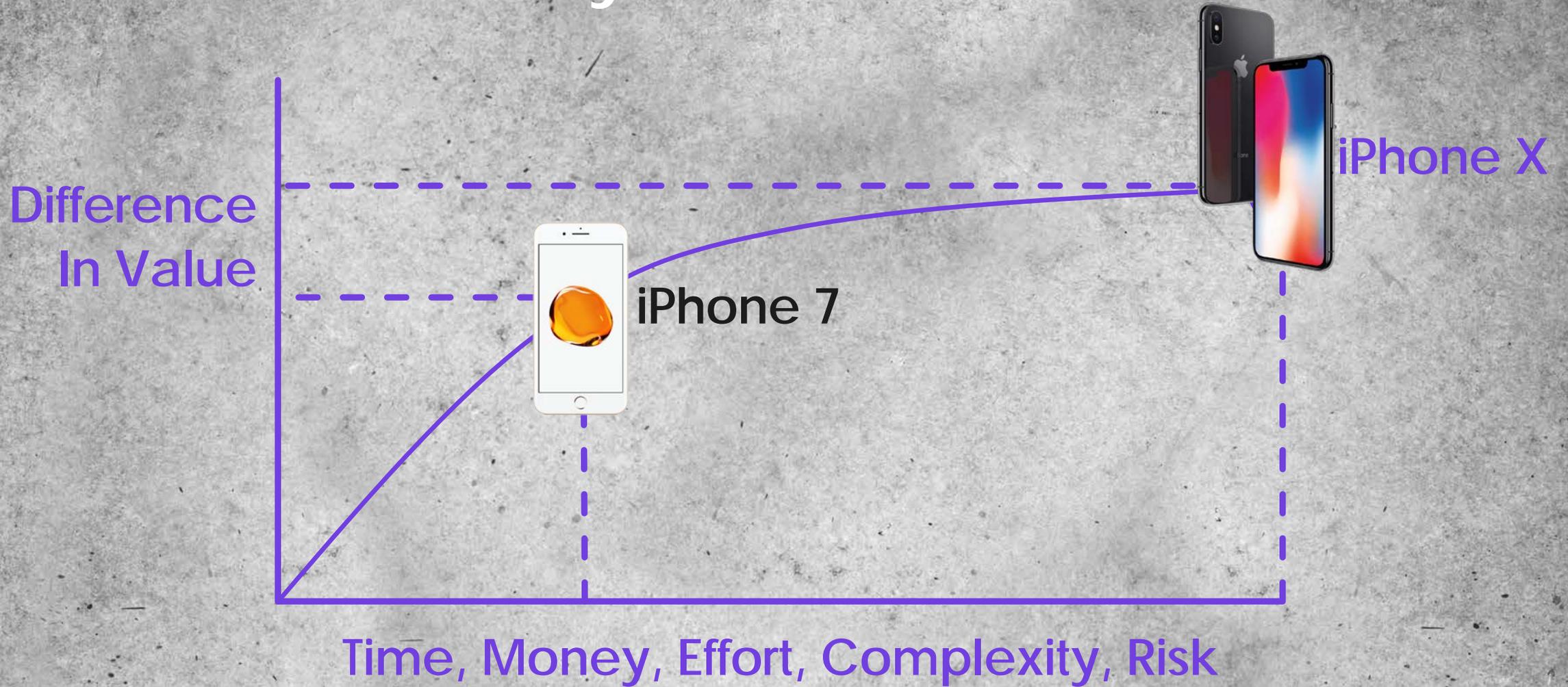
meaningfully different

from what they're doing now

They might even agree it's better:
but it's not worth the hassle
of changing their current approach



Is it really that much better?



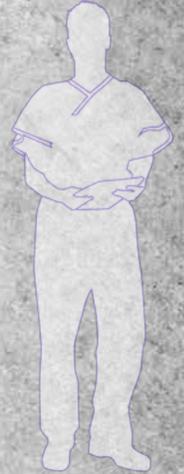
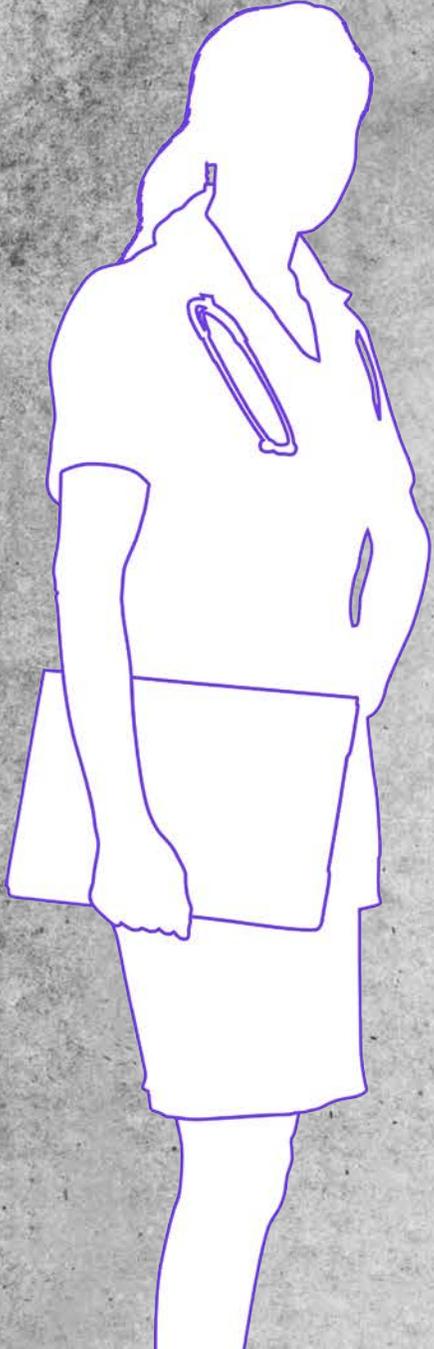
A Deeper Look at Challenging the Status Quo

In Sales Training

We Partner with Brand Teams

And the Sales Force

To Execute the Brand Strategy



And that Boils Down to

Effecting Change at the

Practice as a System of Care Level

Not Just the Physician Level

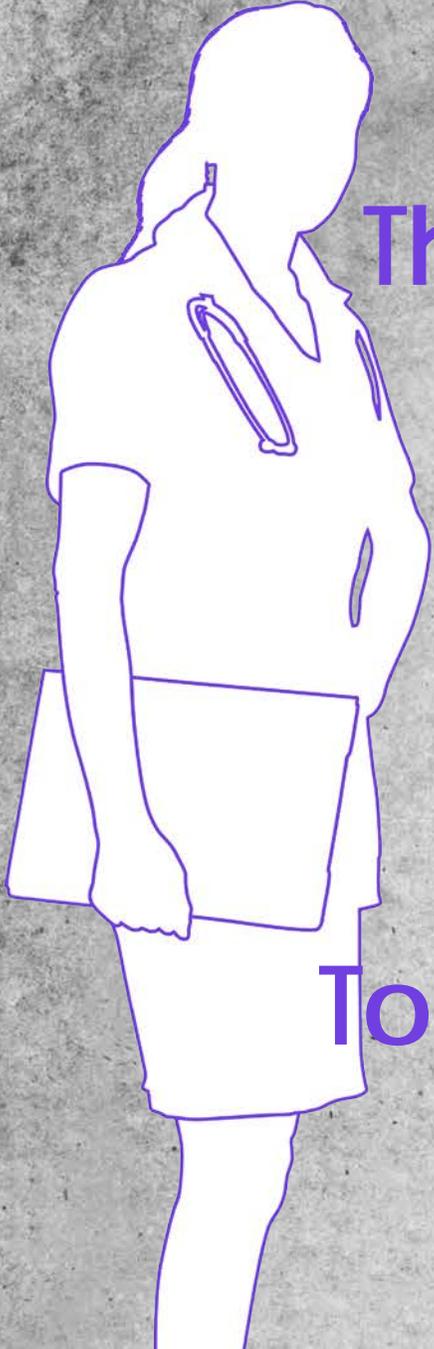
Our Biggest Challenge

The Hardest Strategy to Implement

Is the One that Requires

A Lot of People

To Change their Mindset & Behavior.

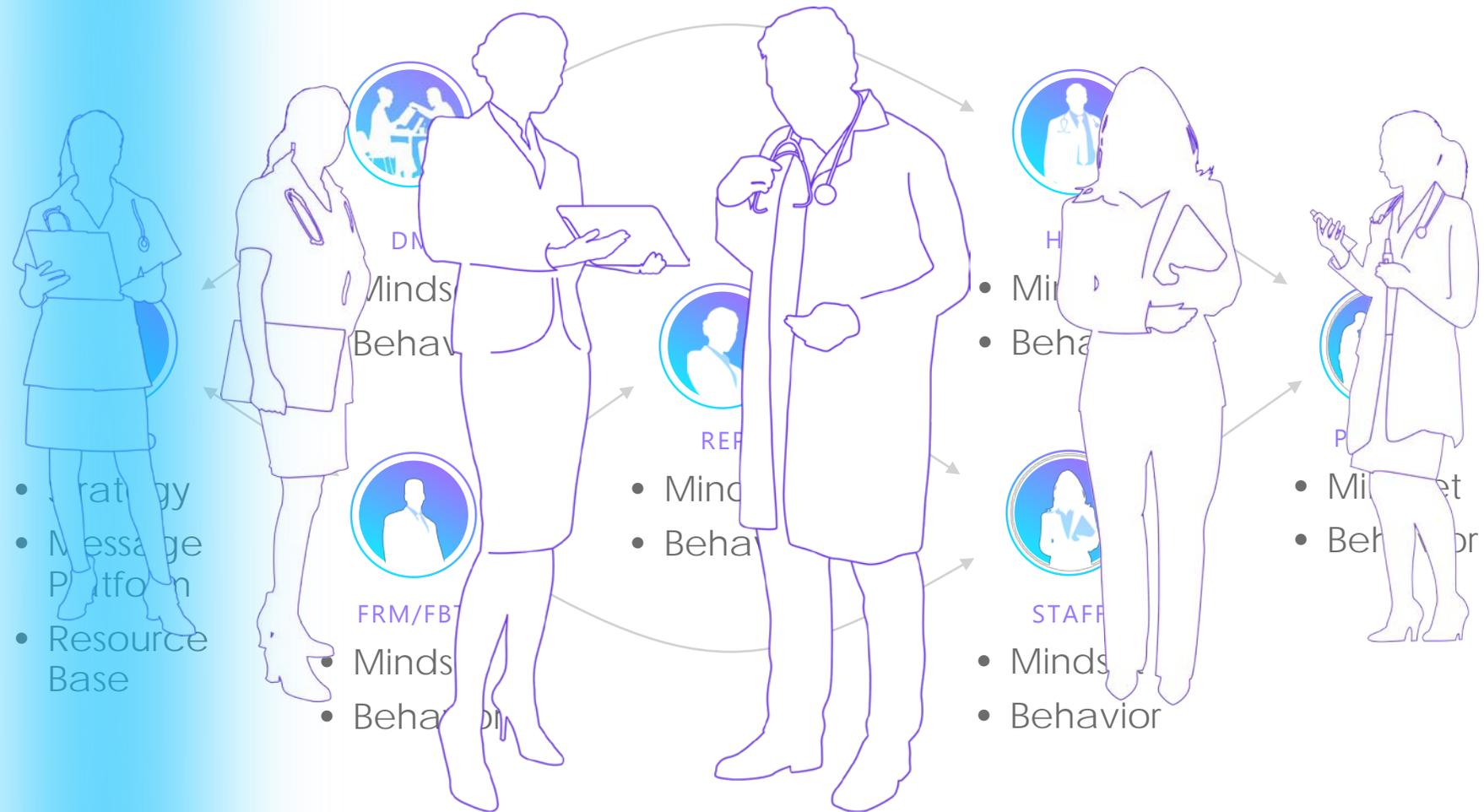




To Effect Change

You Have to Understand the Healthcare Ecosystem

It's About Connecting the Dots Between Brand Strategy and Behavior Change in the Level of the Physician, the Staff, and the Patient.





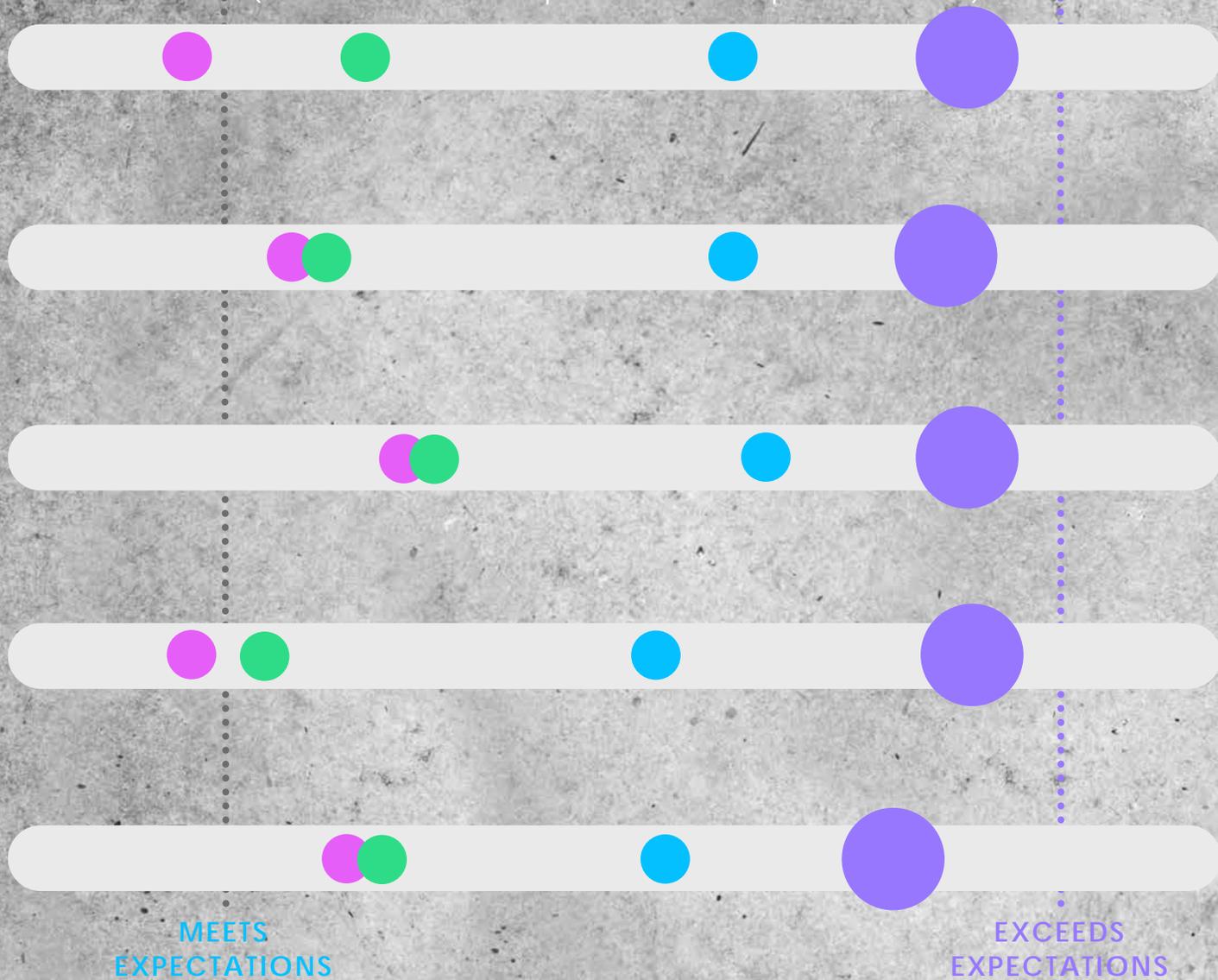
It's Not Just About Delivering Messages

It's About

**Changing the Mindset, Behaviors, and
Protocols of Every Relevant Stakeholder in
the Healthcare Ecosystem**

MEANINGFUL COMPETITIVE DIFFERENTIATION DELIVERED

(Total Treatment Experience Composite Index*)



MEETS EXPECTATIONS

EXCEEDS EXPECTATIONS

N=50 ● COMPETITOR #3 ● COMPETITOR #2 ● COMPETITOR #1 ● QUANTUM CLIENT

PRIORITIZED EXPERIENCE DRIVERS

Helps navigate challenges in the patient experience through insurance and patient support services*

Is a "go-to" resource to provide valuable, effective, and seamless, support for me and my entire staff

Is knowledgeable about products in his/her portfolio, as well as competitive products

Understands the needs and goals of my practice

Clearly articulates the specific patient type for his/her product by providing a convincing rationale to use his/her products over the competition



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*Each item is composed of 5-7 sub descriptors. ZS Associates Data Sets

How Do We Do That?

**How Did We So Effectively
Challenge the Status Quo
At So Many Levels?**



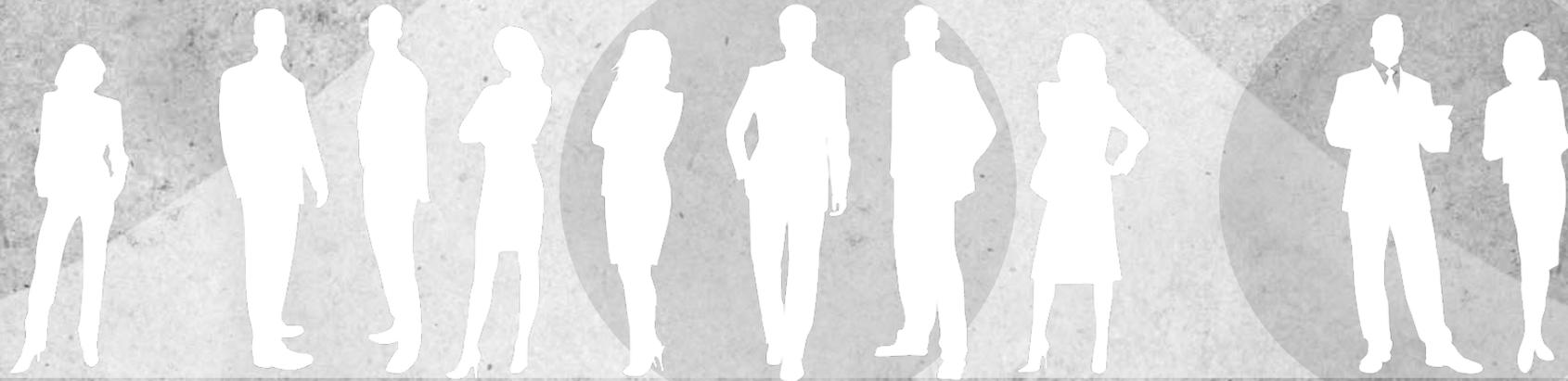
It Starts with Research in Your Ecosystem

HOW WE IDENTIFY THE MINDSET AND BEHAVIORS THAT MOVE THE NEEDLE IN
YOUR WORLD

Blinded Field Rides to Identify the Right Mindset & Behaviors

Middle Performers
Consistently in the 50th percentile for
8 quarters in a row. Solid citizens!

Top Performers
Consistently in the top 3 to 7%
for 8 quarters in a row.



Identify What Your Super Stars Do: Mindset & Behaviors

TRAIN AND COACH THE REST OF YOUR SALES FORCE TO DO THAT

Middle Performers



Super Stars

quantum

What Do Blinded Field Rides
With Top and Middle Performers

Tell Us About What it Takes to
Challenge the Status Quo?



A decorative graphic on a blue-to-purple gradient background. It features a white dotted line that starts on the left, curves upwards, then downwards, and ends with four light blue footprints. The footprints are arranged in a path that follows the curve of the dotted line, suggesting a journey or path.

The Rep's Footprint Matters

TOP PERFORMERS HAVE A MUCH BIGGER FOOTPRINT THAN THEIR MIDDLE PERFORMING COUNTERPARTS IN THE KEY ACCOUNTS THEY CALL UPON



Middle Performers Have a Smaller Footprint

PROACTIVE WITH DOC

REACTIVE WITH STAFF

TALKS MORE

MAKES ASSUMPTIONS

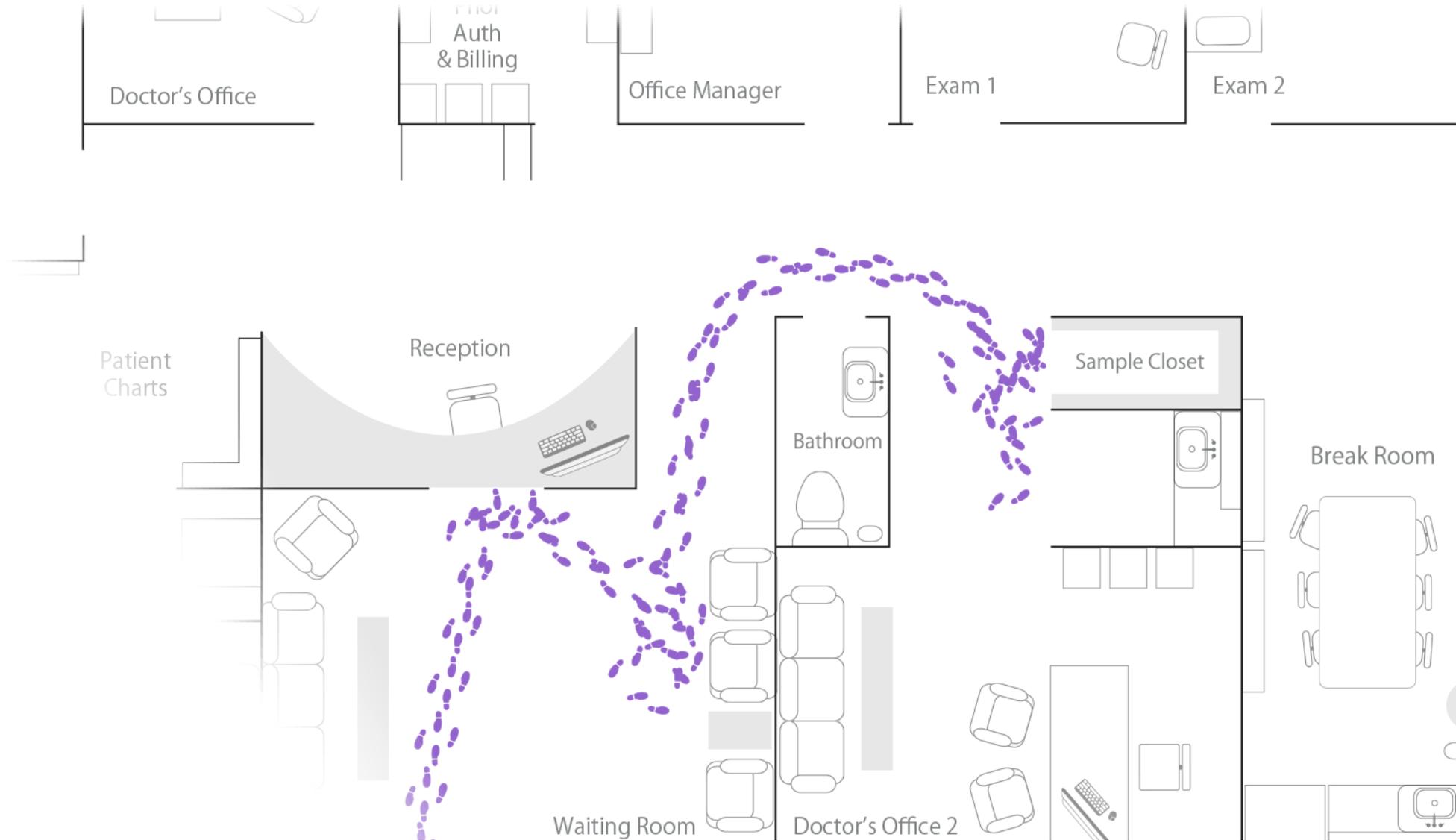
LETS THE CONVERSATION WANDER



Employees ONLY
Beyond this Point
↓

Typical Middle Performer Behavior

SMALLER FOOTPRINT IN THE PRACTICE | MOSTLY "TELL MODE"





Top Performers Have a Bigger Footprint

PROACTIVE WITH DOC **AND** STAFF

TALKS LESS

ASKS MORE QUESTIONS

LISTENS INTENTLY

TESTS ASSUMPTIONS

FOCUSED CONVERSATIONS –
GUIDE WITH QUESTIONS





It's Not Enough to Get the
Physician to Change

It's About
Achieving System Change
Across Every Stakeholder
Along the Continuum of Care
For Your Brand



It's both the patient journey

and

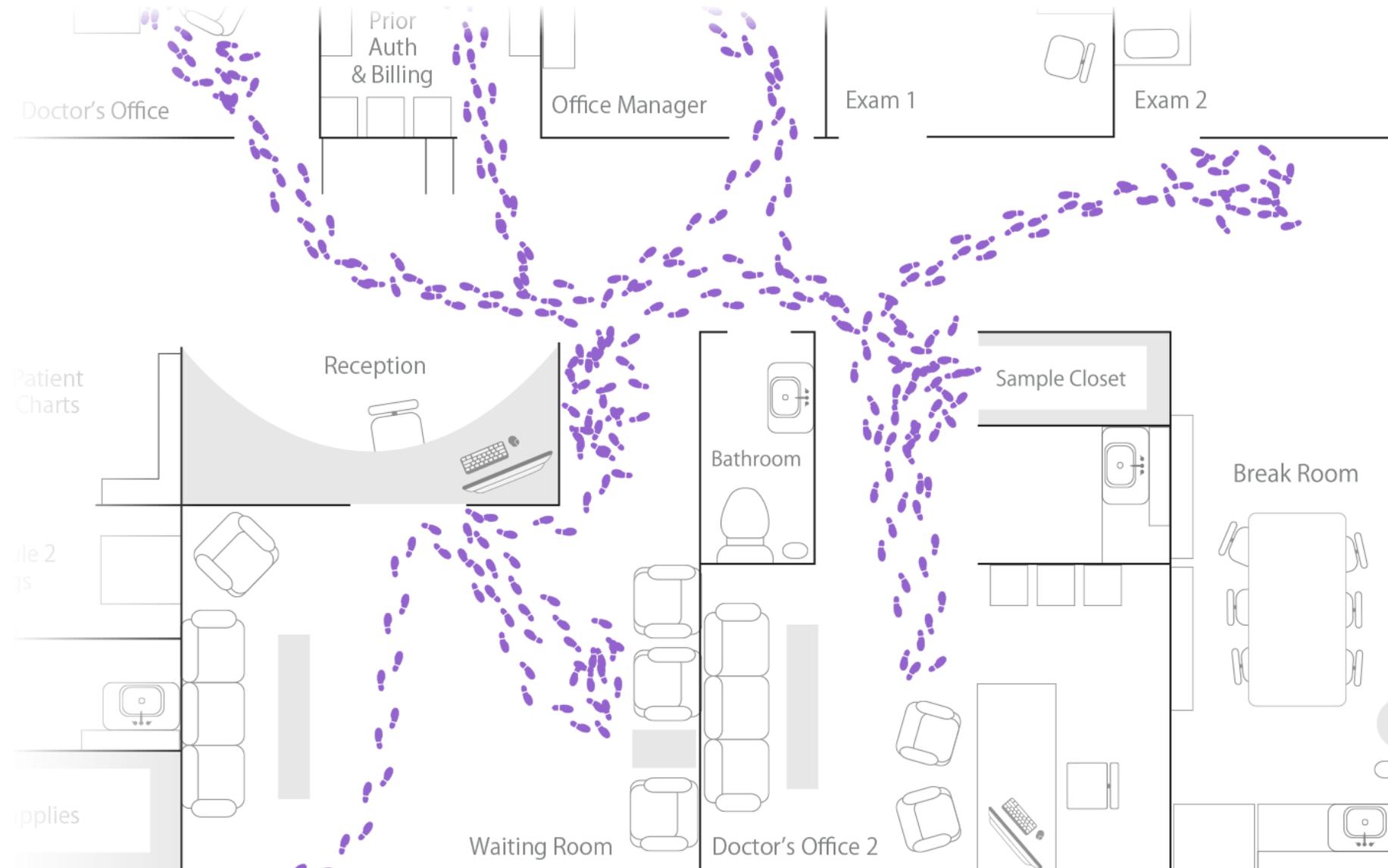
the physician's, practice's, and pharmacy's
journey ...

to create a better
total treatment experience.



Typical Top Performer Behavior

Much Larger Footprint in the Practice and is Focused on "Tipping the System of Care."





Becoming a Practice Partner

Give the Sales Force a Road Map ... from Good to Great to Breathtaking.

Influences change across practice by developing meaningful relationships with all stakeholders in a practice to bring value to them based on their roles. Understands how the practice works and uses that knowledge to pinpoint barriers that may affect appropriate patient flow.



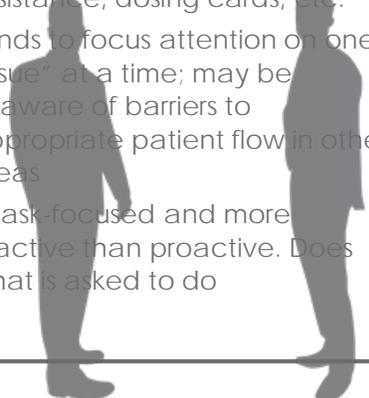
Limited access to the practice and poor understanding of how decisions are made and patients flow through the practice.

- Rarely gets past the receptionist to have meaningful dialogue with any stakeholders
- Doesn't think in terms of managing patient flow through the practice
- Limited access restricts role to building relationships, providing information, and supporting customer requests



Limited access and superficial relationships. Focuses attention on the prescriber rather than systematically developing credible relationships across the practice.

- Gets back to the hall/sample area
- Talks to doc only. Primarily a product-centric monologue
- Is mostly in "tell mode" delivering pre-determined information, messaging, samples, patient assistance, dosing cards, etc.
- Tends to focus attention on one "issue" at a time; may be unaware of barriers to appropriate patient flow in other areas
- Is task-focused and more reactive than proactive. Does what is asked to do



Limited access and surface-level relationships and dialogue. Focuses attention on 1 or 2 areas of the practice at a time.

- Gets back to the hall/sample area
- Has a meaningful dialogue with the doc. Asks the first question (What are you doing now?), but not the "second" question (Why are you doing it that way?)
- Talks with staff but no meaningful treatment-related discussion. Just "makes nice"
- Is aware of problems implied by the physician or staff, such as reimbursement or patient compliance concerns, but doesn't proactively scan for barriers to appropriate patient flow
- Responds to problems as they arise



GOOD



Significant access and well-developed credible relationships. Actively manages patient flow across the practice.

- Gets deep into the "office"
- Meaningful dialogue with doc and 1 other key stakeholder:
 - Prior auth.
 - Callback nurse
 - Patient education
 - Treatment support person
- Asks second question: What and Why
- Proactively scans and probes to identify barriers to 2 strategic positions: from competitive differentiation through appropriate patient identification, treatment, and reimbursement, and address any issues with appropriate resources



GREAT



Deep access, well-developed credible relationships, and strategic understanding of how to bring value to each stakeholder.

- Gets deep into the "system"
- Understands who in the office touches the prior auth. system, patient education process, and who takes patient callbacks
- Knows what the current systems are and how the staff uses them—where the hiccups are, barriers, and opportunities for growth and value
- Fully integrated into the practice and is seen as a partner in patient care
- Consistently pinpoints barriers and then uses the most effective resources to address them to minimize the impact



BREATHTAKING

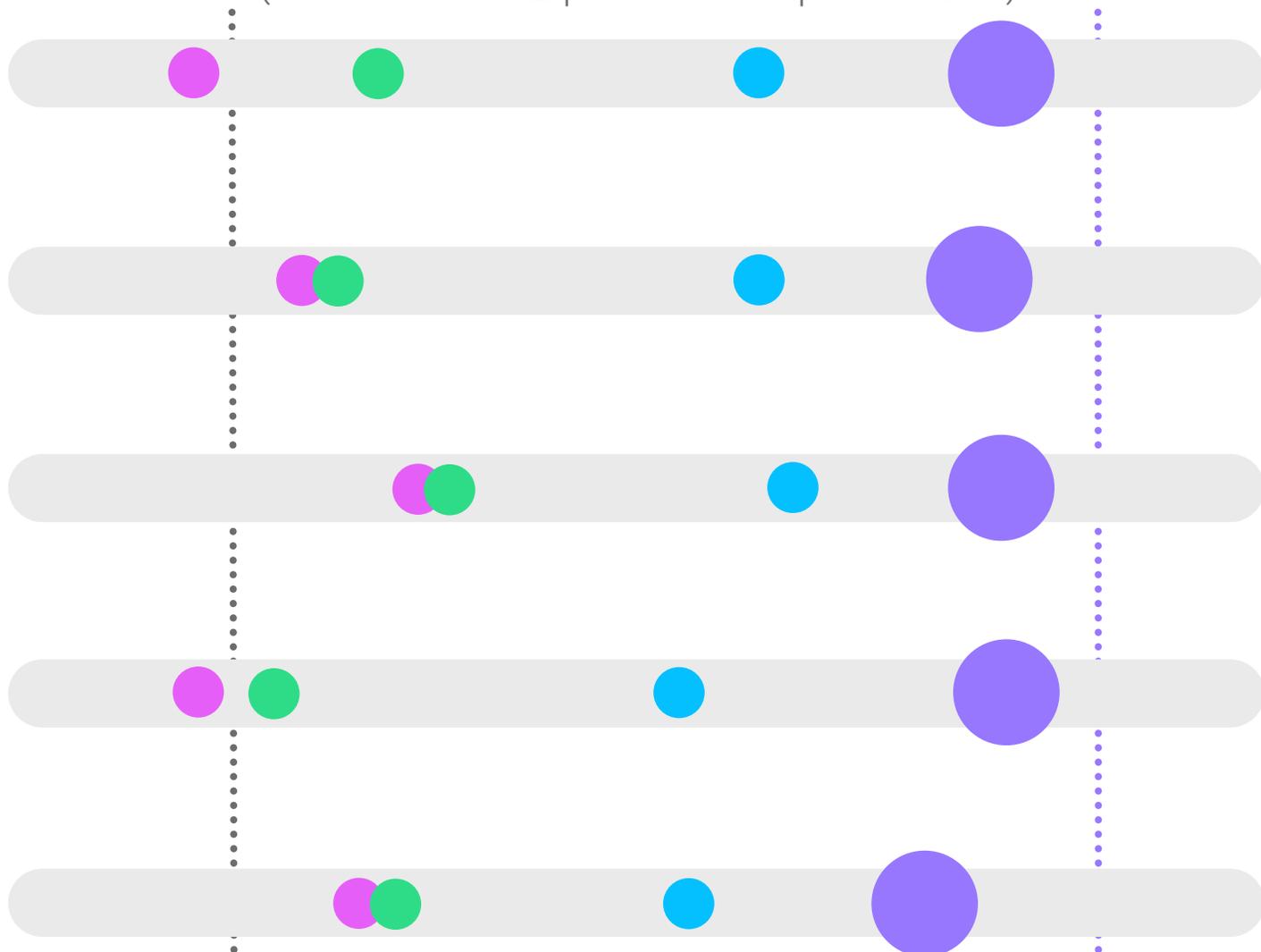


**A Bigger Footprint
Is Essential for Creating
Meaningful Competitive Differentiation
& Achieving System Change**



MEANINGFUL COMPETITIVE DIFFERENTIATION DELIVERED

(Total Treatment Experience Composite Index*)



PRIORITIZED EXPERIENCE DRIVERS

Helps navigate challenges in the patient experience through insurance and patient support services*

Is a "go-to" resource to provide valuable, effective, and seamless, support for me and my entire staff

Is knowledgeable about products in his/her portfolio, as well as competitive products

Understands the needs and goals of my practice

Clearly articulates the specific patient type for his/her product by providing a convincing rationale to use his/her products over the competition

FEEDBACK FROM PHYSICIANS, MID-LEVELS: PA'S, NURSES, REIMBURSEMENT MANAGERS, NURSE EDUCATORS

15 Months to Becoming a Competitive Powerhouse!

N=50 ● COMPETITOR #3 ● COMPETITOR #2 ● COMPETITOR #1 ● QUANTUM CLIENT

*Each item is composed of 5-7 sub descriptors.



When Is
Challenging the Status Quo
The Right Selling Strategy?

4 Selling Strategies – Why and When They Work

AND HOW THEY CAN BACKFIRE AND CREATE MORE PROBLEMS THAN THEY SOLVE

Perceived Complexity & Risk in Using Our Brand	High	Trusted Advisor Help the HCP Work Through What's Best for Their Patients (Complex Product, Inexperienced Customer)	Challenging the Status Quo Give the HCP a New Way of Perceiving Things: Reframe How they Perceive, Think, Act
	Low	FAB Close Deliver the Message, Handle Objections, Close for the Business (Simple Product, Inexperienced Customer)	Relationship Share the Data Let the Customer Decide High Service/Support (Simple Product/Experienced Customer)
		Low	High

HCP Experience in Our Therapeutic Category



**What's the Best Way to
Challenge the Status Quo
Without Making Physician Access Worse?**

ZS Access Monitor

Accessible Physicians Trend*



HCPs with AffinityMonitor™ No-See Rating of 8 to 10 are considered to be accessible

*Based on 240,000 to 347,000 physicians who have been evaluated in different semesters



The Strategy:

Leverage the Latest Insights from:

Neuroscience, Behavioral Economics, and
Customer Experience Management to ...



Change Both Mindset & Behavior

For the Physician, the Staff, and the Patient



And Actually Deepen Our Credibility

Strengthen Our Relationships

And Move the Needle



How?

Disrupt the Competition by Challenging the Status Quo

5 STEPS | 5 BEHAVIORS

Resonate
Emotionally

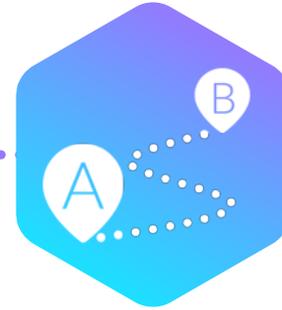


Supply the
Energy
to Change

Resonate
Rationally



Give Them a
Reason
to Change



Simplify the
Path
to Change



Ask for an
Incremental
Commitment



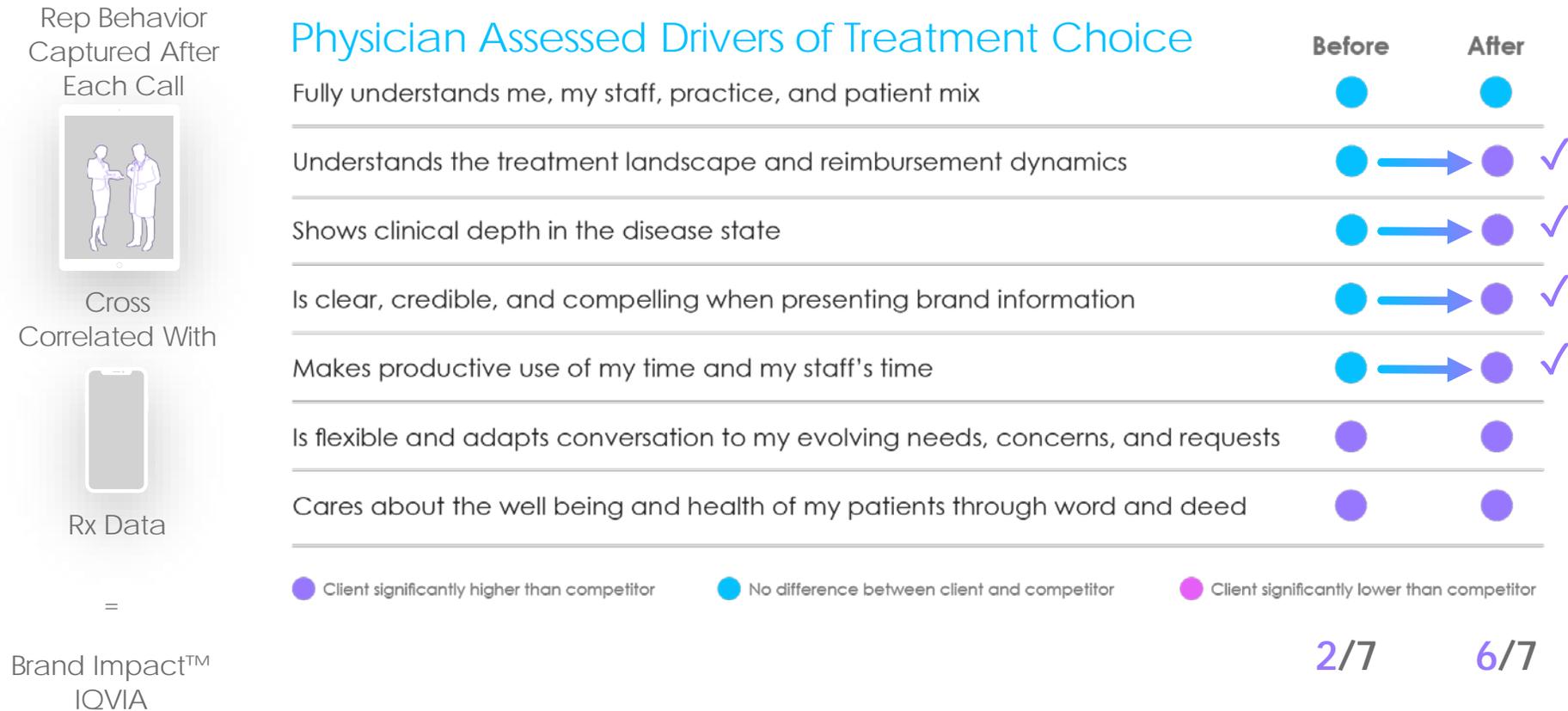
Pull it Through
to Victory

So ...

Does it work?

Successfully Cascading Change in Behavior

IT STARTS WITH CHANGING THE MINDSET AND BEHAVIOR OF BOTH DMS AND REPS WHO IN TURN CHANGE THE PHYSICIAN'S PERCEPTION, MINDSET, BEHAVIOR, AND PROTOCOLS



IQVIA – Former Quintiles | IMS “BrandImpact” data.

For training purposes only. Do not show to healthcare professionals or anyone outside of Quantum Learning, Inc.

Client Case Studies

LTEN EXCELLENCE AWARD FINALISTS

SUMMARY

Expanding growth of a product in a highly competitive space with multiple indications, while also expanding the salesforce, is no easy feat.

This initiative focused on empowering sales representatives, district managers, and product trainers to grow the brand by showing the sales force how to appropriately challenge current treatment paradigms and HCP thinking, using a new customer engagement model. What made the initiative successful was the seamless integration of brand strategy, message platform, and customer engagement training. The new customer engagement model became a key part of the brand strategy.

SITUATION ANALYSIS

Our challenge was developing a customer engagement model that was intuitive and impactful for 5 different indications (CQWD, CLL, MCL, MZL, WM), while keeping the needs of the brand top of mind.

Our goal? To roll out a customer engagement model that:

- Integrated marketing strategy,
- Changed HCP prescribing behavior, and
- Was effective for sales representatives to use, regardless of their focused indication.

Our initiative was to help the salesforce move the needle by Disrupting the Status Quo: level setting with healthcare providers around the disease state first before pivoting to product discussions.

We partnered with Quantum Learning, Inc. to create a research-based, customized, customer engagement model that simplified the process of engaging customers in meaningful ways that brought the HCP to the tipping point of change.

METHODS/APPROACH

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Figure 1: Key Results

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From	To
● ● ● ● ● ● ●	● ● ● ● ● ● ●

PCYC TEAM

Claudia Bujold
Genevieve Caron
Michael Hall

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KEY

CS: Clinical Specialist
DM: Division Manager
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FCR: Field Coaching Report

METHODS/APPROACH

DM

- Identified Need Through 360 Survey
- Reinforced Through Application Exercises at Workshops
- Application Through Utilization of FCR in Workshops
- Participation & Accountability at Every Level

CS

- 3 National Live Workshops
- Consistent Reinforcement Training
- Innovative, Evolving Application of Skills
- Elevating FBT Role to Gain Buy-in

EVALUATION AND CONCLUSION

Insightful Questioning: With regards to the Clinical Specialist's ability to ask insightful questions regarding practice needs, clinical data and/or patient needs in a way that lead to a meaningful discussion increased from 38 to 43 percent.

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Kristi Ciro-Baumann, Principal Training Manager, GIO
Michelle Soto, Manager, GIO LUCENTIS/XLAIAR Training Teams
Vince Cavallere, Senior Trainer
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Have Fun, Keep it Simple, Move the Needle



quantum®



Thank You!

quantum[®]

Fred Marshall, CEO/Founder
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215-579-0540

YOUR FEEDBACK IS IMPORTANT TO US

Please take a moment to complete the workshop evaluation located in the mobile app. LTEN looks to your feedback to help improve the program each year.

1. Open the Mobile App
2. Click on the Agenda
3. Select the Session You Are Evaluating
4. Click on "Start Survey"

If you do not want to complete the survey in the mobile app, you can collect a hard copy form at the registration desk.

