



## Sales Professional/Account Manager Competency Framework

### 2015 Coaching Observation Tool



# Sales Professional/Account Manager Job Requirements

## PURPOSE

The Sales Professional/Account Manager job requirements provide the minimal performance expectations for field-based Sales Professionals and Account Managers, supplementing the Grade-Specific Patient First Sales Competency Framework.



Living our values is an overarching expectation that flows through the fundamental requirements for each employee at GSK. You are expected to act as a role model, ensuring everything you do is in line with our values, serving patients and customers.

## PERFORM AND DEVELOP AS A SALES PROFESSIONAL/ACCOUNT MANAGER

- Project a professional image at all times. As the face of GSK, never engage in behaviors that may bring disrepute to GSK or its image. This includes, but is not limited to professional dress and respectful and inclusive language and behavior.
- Communicate regularly with First Line Leader (FLL).
- Utilize best-selling efforts each day to profitably contribute to the business in a Values-based way.
- Accept personal responsibility to complete all job duties in a timely fashion as defined by the Company. Examples include, but are not limited to, the following:
  - Meet expectations for call activity as defined by your district/region/division.
  - Meet expectations for time in territory established in each district/region/division.
  - Check emails, Field Communications, voice mails, and cell communications and respond as appropriate within designated time frames.
- Successfully complete all mandatory initial and ongoing training within designated time frames.
- Successfully pass certifications and complete simulations including, but not limited to, Scientific Knowledge within designated time frames.
- Create a business plan outlining tactics, activities, and resources within designated time frames.
- Prepare for and fully participate in the Field Contact process and Patient First activities, to include:
  - Participate in minimum required work contacts with FLL or designated observer
  - Plan work schedules that allow for observation by FLL or designated observer
  - Complete and “check in” (Field Coaching Report) FCR within designated time frame
- Update and complete an ePDP at a minimum of twice per year.

## DEMONSTRATE GSK VALUES

Adhere to GSK Policies and Procedures and GSK Values, including the Code of Conduct and the Commercial Practices Policies and all Fleet Policies. These include, but not limited to, the following:

### Patient Focus

- Represent GSK in a way that puts patients first and protects the Company's reputation.
- Exercise ethical decision making by applying the letter and spirit of policies to each situation, always patient focused.
- Use only GSK-approved resources during customer interactions (eg, selling materials, patient education).

### Respect

- Always treat customers, coworkers, managers, and the Company with dignity and respect.
- Accept personal accountability for respectfully delivering on commitments to build trust of customers, management, and coworkers.

### Transparency

- Accept responsibility to capture and accurately report all required data (eg, customer contacts) in a timely and complete manner following established guidelines and using the principles of Write Right in free text notes.
- Report all Adverse Events within 24 hours to the Field Response Center (888-825-5249).

### Integrity

- Review, understand, and comply with GSK Policies and Procedures and Company Values; always "Speak Up" when you see or suspect inappropriate actions.
- Ensure that all interactions with customers comply with these policies and procedures and that these interactions reflect the highest integrity.
- Accept responsibility for data completeness, accuracy, and timeliness.
- Complete all expense reports on an accurate and timely basis and in full compliance with the T&E policy.
- Accurately record customer calls on a daily basis consistent with the approved call definition.
- Adhere to Write Right guidelines

# Competencies, Dimensions, and Themes

## COMPETENCY DEFINITIONS

**Business Acumen:** Understand our customers' business and medical climate and match this appropriately to approved GSK products in a manner that is ethical, patient focused, and profitable for GSK.

**Customer Engagement:** Build a deep understanding of the needs and goals of customers by questioning and listening to them and using that understanding to build trust and credibility to align appropriate, approved information that enables customers to better serve their patients.

**Scientific Knowledge:** Full comprehension of clinical aspects that are related to approved product information and materials (including approved indications and information from the home office on epidemiology, anatomy, pharmacokinetics, and appropriate usage) with the ability to transfer this knowledge to customers and peers in a proactive and reactive manner that is always in accordance with GSK policy. Employees are not expected to know information that is outside of product labeling or not approved for promotion and must never discuss this unapproved material with any customer.

## DIMENSION DEFINITIONS

**Preparation:** Activities that involve seeking, synthesizing, reviewing, organizing, prioritizing, and understanding data and information to use in building knowledge, effective strategies, plans, and tactics.

**Implementation:** Acting on Preparation activities to convey and implement information that customers can use for the benefit of their patients; sustained performance to a plan of action; Customer Engagement.

## THEMES DEFINITIONS

### Customer Engagement

**Customer Planning:** Development and implementation of plans for any customer interaction

**Patient-Centric Dialogue:** Development and implementation of dialogue that demonstrates an understanding of the customers' or patients' needs and challenges

**Customer Discovery/Insightful Questions:** Development and implementation of questions that help to understand or demonstrate a deep understanding of the customers' needs, challenges, or priorities and the drivers of the customers' behavior

### **Scientific Knowledge**

**Brand Strategy:** Understands and executes on current brand strategy

**Disease State:** Understands anatomy, disease, and pathophysiology associated with a pharmaceutical product's approved indication

**Marketplace:** Understands healthcare options within a disease state

**HQ-Approved Resources:** The appropriate communication of product information utilizing headquarters' approved resources to maximize value to the customer and/or patient




### **Business Acumen**

**Business Planning/Executes Business Plan:** Develops business/account plans that appropriately align resources/activities to customer opportunities; follows through on goals aligned in business plan

**Account Management:** Understands all aspects of a specific customer's business model and the other factors that influence the customer's decisions in order to cultivate an appropriate patient-centric business relationship










**Positioning GSK-Approved Solutions/Resources:** Plans and allocates the appropriate headquarters-approved solutions/resources based on an understanding of the customer's needs, while maintaining a profitable mind-set

# BUSINESS ACUMEN PREPARE

	<b>Business Planning</b> 		<b>Account Management</b> 		<b>Positioning GSK-Approved Resources</b> 	
<b>Exceptional</b>	Develops a <b>strategic territory-level plan</b> based on business analysis <b>aligning district/regional objectives</b>	<b>Prepares for a specific business opportunity aligning</b> insight gained through customer interactions/GSK resources	Discusses with FLL <b>what influences the goals and priorities of their key customers</b>	<b>Prepares and updates in GSK 360 a comprehensive</b> customer/account profile	<b>Uses available data to prioritize accounts</b> aligned to GSK opportunities <b>based on BU measures and objectives</b>	<b>Plans resources aligning brand strategy and BU objectives with the explicit need(s)</b> of customers at <b>various levels</b> within the account
<b>Distinguished</b>	Utilizes <b>trends in data to identify business opportunities for key customers/accounts in strategic territory plan</b>	<b>Discusses</b> how customer's local healthcare environment may <b>impact delivery of patient care</b>	Plans tactics based on <b>understanding of the customer's business goals/priorities</b>	<b>Identifies decision makers and influencers in conjunction with decision makers</b> within the account/organization	<b>Articulates how the customer's payer mix/ distribution system impacts</b> the customer's decisions	<b>Discusses with FLL plan</b> to utilize resources that <b>align brand strategy with customer needs and BU objectives</b>
<b>Proficient</b>	<b>Analyzes customer-level information</b> using appropriate data to <b>build a strategic territory plan</b>	Takes the initiative to <b>identify personal business planning/ acumen needs</b> based on available GSK tools and resources	Describes the <b>account structure/affiliations of key customers</b>	<b>Plans interactions based on an account's ways of working</b> , including hours, process, and protocol	<b>Identifies the status of products</b> (formulary/ purchasing status/contract status/supply/NDC status) by using GSK-approved sources	<b>Effectively manages</b> a personal inventory of <b>currently approved GSK</b> resources aligned to BU expectations









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# BUSINESS ACUMEN IMPLEMENT

	Executes Business Plan		Account Management		Positioning GSK-Approved Resources	
	   		 		  	
<b>Exceptional</b>	Executes a territory-level plan based on business analysis aligning to the district/regional objectives	Executes tactics aligned to specific business opportunity based on customer insights/GSK resources	Engages key customers by applying knowledge of what influences their goals and priorities	Leverages strategic business relationships at various levels within the account	Executes strategies in prioritized accounts based on BU measures and objectives, aligned to GSK opportunities	Effectively implements resources aligning brand strategy and BU objectives with the explicit need(s) of customers at various levels within the account
<b>Distinguished</b>	Executes action steps based on trends in data defined in the strategic territory plan	Implements planned tactics to address changing healthcare trends that impact delivery of patient care	Implements tactics based on an understanding of customer's business goals/priorities	Appropriately engages the decision makers and influencers in conjunction with decision makers within the account/organization	Implements a tailored approach to each call based on knowledge of the customer's payer mix/contract opportunities	Executes appropriate utilization of resources that align brand strategy with customer needs maintaining a profitable mind-set
<b>Proficient</b>	Presents to FLL a strategic territory plan consistent with GSK's Use of Individual/Territory Sales Data use policy	Completes self-identified business planning/acumen skill development using available GSK tools and resources	Engages key customers based on an understanding of account structure/affiliation	Executes GSK business activities while respecting the customer's ways of working	Demonstrates knowledge of formulary/contract status by referencing HQ-approved resources	Utilizes relevant current HQ-approved branded or non-branded material appropriate to customer role giving fair balance on product discussions









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# CUSTOMER ENGAGEMENT PREPARE

	<b>Customer Planning</b>   		<b>Patient-Centric Dialogue</b>  		<b>Customer Discovery/Insightful Questioning</b>   	
<b>Exceptional</b>	<b>Develops customer engagement plan that aligns brand strategy and customer-centric goals</b>	<b>Plans alignment of relevant GSK-approved solutions/resources to various account stakeholders based on customer knowledge</b>	Plans <b>patient-centric</b> dialogue with <b>multiple types of influencers</b> within the account to successfully <b>implement/sustain GSK-approved solution(s)</b>	Plans patient-centric dialogue <b>that allows the customer to express needs prior to</b> presenting information/approved GSK solutions	Prepares a <b>pre-engagement plan</b> with <b>specific questions that moves the customer to the next phase on the decision cycle</b>	Prepares (purposeful) MCE-based questions to understand the <b>customer's current state and desired state</b>
<b>Distinguished</b>	Creates a customer-centric call <b>ASmart objective including a planned advance(s)</b>	<b>Discusses</b> how roles/responsibilities of key account stakeholders <b>influence patient/customer-centric solutions</b>	Plans <b>relevant</b> patient-centric <b>dialogue</b> aligned to identified <b>customer needs</b>	<b>Prepares tailored discussion</b> based on the need of the customer, <b>demonstrating the ability to adapt</b> based on the situation	<b>Plans insightful questions</b> to advance <b>previous discussion(s)</b> to understand the customer's need	<b>Shares with FLL</b> additional customer <b>insights from various stakeholders</b> to develop <b>ASmart objective(s)</b>
<b>Proficient</b>	<b>Reviews/analyzes customer insights</b> (eg, approved data resource tools, call notes) <b>prior to</b> customer interaction	Discusses the <b>roles/responsibilities</b> of key stakeholders within the office/account	Develops a <b>patient-centric call opener</b> with a specific call <b>objective that includes people, purpose, and permission (3 P's)</b>	<b>Plans how to ask for agreement from the customer to prescribe/purchase a GSK product linked to a customer's need</b> for the appropriate patient or <b>plans how to ask for agreement from the customer</b> to take action that <b>advances the customer toward a GSK solution linked to his/her need</b>	Plans <b>insightful questions to identify/confirm the customer's place in the decision cycle</b>	Plans insightful questions to <b>uncover what influences/informs customer actions</b>




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# CUSTOMER ENGAGEMENT IMPLEMENT

	Executes Customer Plan		Patient-Centric Dialogue		Customer Discovery/Insightful Questioning	
	  		 		  	
Exceptional	Executes customer engagement plan aligning brand strategy and customer-centric goals	Follows up with key account stakeholders to ensure pull-through of patient/customer-centric solutions aligned to identified needs	Engages in patient-centric dialogue with multiple types of influencers within the account to successfully implement/sustain GSK-approved solution(s)	Engages in patient-centric dialogue that allows the customer to express needs prior to presenting information/approved GSK solutions	Asks (purposeful) insightful questions that move the customer to the next phase on the decision cycle	Asks (purposeful) insightful questions to uncover the customer's current state and desired state
Distinguished	Engages in dialogue around a patient-centric ASMArt objective that increases knowledge of the customer beyond current insights	Demonstrates the ability to engage account stakeholders based upon their influence on patient/customer-centric solutions	Executes relevant patient-centric dialogue aligned to customer needs	Engages in a tailored discussion aligned to the need of the customer, adapting approach based on the situation	Asks insightful questions to advance a previous discussion to understand the customer's need	Asks purposeful questions based on stakeholder insights that align to the ASMArt objective
Proficient	Utilizes customer insights as a starting point or focus of customer interactions	Engages in dialogue with key stakeholders within the office/account based on understanding of their roles/responsibilities	Initiates dialogue through a patient-centric call opener aligned to the planned objective, incorporating people, purpose, and permission (3 P's)	Seeks and gains agreement from the customer to prescribe/purchase a GSK product linked to a customer's need for the appropriate patient or seeks and gains an agreement from the customer to take action that advances the customer toward a GSK solution linked to his/her need	Asks insightful questions that uncover/confirm the customer's place in the decision cycle	Asks insightful questions uncovering what influences/informs customer actions




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# SCIENTIFIC KNOWLEDGE PREPARE

	Brand Strategy 	Disease State 	Marketplace 
Exceptional	Works with FLL in preparation for a district/ regional initiative to improve upon how team aligns brand strategy with identified customer needs	Discusses anatomy and pathology of the disease state with FLL in relation to GSK product labels aligned to customer needs	Identifies and articulates opportunities and gaps for GSK product(s) based on understanding of customer's use of competitive product(s)
Distinguished	Shares with FLL how brand strategy aligns with the identified business unit objectives and customer need(s)	Describes approved treatment guidelines/pathways/ standards of care before key customer interactions	Discusses with FLL the reasons why a customer uses GSK product(s) with a specific patient segment
Proficient	Accurately articulates the brand strategy with FLL for each product within portfolio	Prepares for scientific discussion by proactively practicing with FLL for anticipated customer interaction	Discusses with FLL how a customer is using the GSK product (NOTE: GSK sales professionals should not create or make recommendations or suggestions as to where a GSK product should be used within a customer's treatment protocol. GSK sales professionals should not include or use customer protocols as part of their discussions with customers.)

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# SCIENTIFIC KNOWLEDGE IMPLEMENT

	Brand Strategy 	Disease State 	GSK-Approved Resources 
Exceptional	Executes the agreed-upon district/regional initiative to improve the alignment of brand strategy with identified customer needs	Appropriately leverages a GSK matrix partner or resource to meet a customer's specific scientific need	Strategically uses relevant portions of the PI/HQ-approved resource related to an identified customer need with customers of various responsibilities for patient care, always providing fair balance in product discussions
Distinguished	Appropriately utilizes GSK products/resources aligning brand strategy to meet a customer's need	Engages the customer in appropriate disease state dialogue to understand his/her specific treatment goals	Demonstrates the ability to insert multiple GSK-approved resources aligned to a customer need, always providing fair balance in product discussions
Proficient	Appropriately positions a GSK product aligned to brand strategy	Asks appropriate disease state-related questions to open dialogue and uncover customer needs	Utilizes relevant GSK-approved resources during customer interactions, always providing fair balance in product discussions

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# SALES PROFESSIONAL/ACCOUNT MANAGER

## RED ZONE BEHAVIORS

GRADE 9






These behaviors can be exhibited in any of the competency areas and are not all-inclusive.

TRANSPARENCY	RESPECT	INTEGRITY	PATIENT FOCUS
Not providing the complete Prescribing Information for each product discussed on every sales call	Harassment, retaliation or discrimination: Any potential concerns or observations must be reported to the Speak Up Integrity Line	Soliciting an off-label question: Where off-label questions are initiated by the customer, the SOP for answering them should be followed	Sales data should be used consistent with the individual Territory Sales Data Use policy
Having knowledge of or observing a CPP or other policy violation and not reporting. All violations must be reported to the Speak Up Integrity Line	1) Providing any business service to the customer (eg, processing paperwork for a customer) 2) Linking our efforts to improving the customer's business	Use of materials not approved by GSK or misuse of approved materials. Use of homemade "bread". All materials should be used according to GSK instructions	Selling a product without training certification
Not providing fair balance: Each product sales call should contain a balance of efficacy and safety information	Marketing the spread	Falsification of records or other company documents	Quid pro quo arrangements
	Encouraging or directing others to engage in Red Zone Behaviors	Not using "Write Right" principles when creating call notes, emails, or other documents and communications	Not providing fair balance: Each product sales call should contain a balance of efficacy and safety information.
		Linking use of our products/services to compensation opportunities for customers	Off-label sales and promotion: Only approved products and their indications should be discussed.
		Off-label sales and promotion: Only approved products and their indications should be discussed	Not providing the complete prescribing information for each product discussed on every sales call
		Misuse of samples, coupons and vouchers; Samples, coupons and vouchers should be used in the manner instructed by GSK (e.g., should not be sold or bartered, and should not be left with excluded specialties)	Not providing accurate product information during discussions with customers
		Inappropriately comparing competitor products.	Failure to report an adverse event
		Selling a product without training certification	
		Failure to submit appropriate documentation and receipts for expenses	
		Failure to adhere to the Patient First integrity expectations	
		Failure to safeguard company information, technology resources, and personally identifiable information	










This is not intended to be an exhaustive list but is presented for illustration purposes. All employees are expected to understand and comply with CPPs and all other policies and procedures established by GSK – as well as exhibit GSK Values in all that they do.

# BUSINESS ACUMEN PREPARE

	<b>Business Planning</b> 		<b>Account Management</b> 		<b>Positioning GSK-Approved Resources</b> 	
<b>Exceptional</b>	<b>Assists FLL in development of district/regional plan</b> based on knowledge of healthcare trends that potentially impact business	<b>Identifies an appropriate potential solution that advances</b> a district/regional objective aligned to brand/GSK strategy	<b>Discusses with FLL</b> how appropriate GSK solutions align to customer's <b>long-term</b> patient-focused objectives	<b>Develops an ongoing account plan</b> to work with <b>decision makers and influencers in conjunction with decision makers in the account</b> to embed/sustain GSK-approved solutions	<b>Takes initiative to develop a plan across district/region</b> that maximizes formulary/contract opportunities that includes <b>accountability measures consistent with GSK's Use of Individual/Territory Sales Data policy</b>	<b>Takes initiative to facilitate discussion with FLL to analyze and determine the impact</b> of customer segment resource utilization at <b>district/regional level</b> using <b>ASMARK principles</b>
<b>Distinguished</b>	<b>Provides FLL specific examples of local healthcare trends and the potential impact</b> to district/regional business plan	<b>Collaborates with matrix partners</b> to create appropriate tactics that address <b>a specific business opportunity</b>	Plans to utilize GSK <b>matrix</b> partners who can offer appropriate resources/insight <b>based on the customer's priorities</b>	Plans how to <b>appropriately involve decision makers and influencers in conjunction with decision makers</b> in the account to implement GSK-aligned solutions	<b>Works with GSK stakeholders/matrix partners to create a plan</b> that removes barriers to <b>implement a GSK resource</b>	<b>Demonstrates accountability in territory plan</b> that <b>effectively allocates</b> resources, budget, and time to identified customer segments <b>aligned to BU objectives</b>
<b>Proficient</b>	<b>Develops a strategic territory-level plan</b> based on business analysis <b>aligning district/regional objectives</b>	<b>Prepares for a specific business opportunity, aligning</b> insight gained through customer interactions/GSK resources	Discusses with FLL <b>what influences the goals and priorities of his/her key customers</b>	<b>Prepares and updates a comprehensive</b> customer/account profile in GSK 360	<b>Uses available data to prioritize accounts</b> aligned to GSK opportunities <b>based on BU measures and objectives</b>	<b>Plans resources aligning brand strategy and BU objectives with the explicit need(s)</b> of customers at <b>various levels</b> within the account









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# BUSINESS ACUMEN IMPLEMENT

	Executes Business Plan		Account Management		Positioning GSK-Approved Resources	
	   		 		  	
<b>Exceptional</b>	Leads implementation of tactics aligned to key customer trends <b>that are adopted at the district or regional level</b>	Leads initiative of <b>appropriate solution(s)</b> that <b>advances</b> district/ regional objective aligned to brand/GSK strategy	<b>Demonstrates to the customer how appropriate GSK solutions align</b> to his/her <b>long-term</b> patient-focused objectives	<b>Embeds or sustains a GSK solution</b> by working with decision makers and influencers in conjunction with decision makers <b>aligned to GSK strategy or BU objectives</b>	Leads execution of a plan with district/region that maximizes formulary/ contract opportunities	<b>Collaborates with district/regional team to execute plan based on</b> customer segment resource utilization analysis
<b>Distinguished</b>	Shares with district/ region examples of local healthcare trends and <b>the impact</b> to district/ regional business plan	Executes a strategic plan with <b>matrix partners to address a specific business opportunity</b>	Appropriately utilizes GSK <b>matrix partners'</b> resources/insight based on detailed <b>understanding of the customer's priorities</b>	<b>Implements GSK-approved patient-focused solutions by working with decision makers and influencers in conjunction with decision makers</b> in the account	<b>Executes plan with stakeholders/matrix partners</b> to remove barriers to implement a GSK resource	<b>Executes and measures the allocation of</b> resources, budget, and time to identified customer segments aligned to BU objectives
<b>Proficient</b>	Executes a <b>territory-level plan</b> based on business analysis <b>aligning to the district/regional objectives</b>	Executes tactics aligned to a <b>specific business opportunity</b> based on customer insights/GSK resources	<b>Engages key customers by applying knowledge</b> of what influences <b>their goals and priorities</b>	<b>Leverages strategic business relationships</b> at various levels within the account	<b>Executes strategies in prioritized accounts</b> based on BU measures and objectives, aligned to GSK opportunities	<b>Effectively implements approved resources aligning brand strategy</b> and BU objectives with the explicit need(s) of customers at various levels within the account









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# CUSTOMER ENGAGEMENT **PREPARE**

	<b>Customer Planning</b>   		<b>Patient-Centric Dialogue</b>  		<b>Customer Discovery/Insightful Questioning</b>   	
<b>Exceptional</b>	Coordinates the ongoing plan with <b>specific objectives and measurable outcomes with key stakeholders</b> for priority accounts	Demonstrates flexibility <b>to adapt strategy, with specific measures</b> , in response to <b>external or internal changes aligning to customer's needs</b>	Develops a plan with matrix partners, including measures of success/ accountability for <b>utilization of GSK-approved solutions aligned to patient-centric needs, affecting multiple geographies/territories</b>	Collaborates with matrix partner to <b>develop strategy that creates access to the customer/ account</b>	<b>Aligns explicit need(s) of multiple stakeholders</b> in the account to approved GSK solution(s)	<b>Identifies customer trends</b> that could impact implementation of a GSK solution utilizing a thorough knowledge of the customer gained through stakeholder feedback, local knowledge, and research
<b>Distinguished</b>	Develops an aligned patient/customer-centric <b>strategy with matrix partners planning</b> for opportunities	Builds strategy into an <b>account profile</b> aligned to the <b>customer's identified goals, priorities, and initiatives</b>	Plans patient-centric responses utilizing Customer Engagement principles to <b>anticipated questions/concerns</b> based on information from previous discussions	<b>Shares with FLL</b> a planned dialogue that <b>reframes the conversation</b> to an appropriate customer/ patient-focused solution aligned to an identified need	<b>Plans various types of insightful questions to (problem/implication/ need-payoff)</b> develop explicit need	Plans multiple insightful questions to uncover <b>key customer's decision criteria for implementing</b> potential GSK solutions
<b>Proficient</b>	<b>Develops customer engagement plan that aligns brand strategy and</b> customer-centric goals	<b>Plans alignment of relevant GSK solutions/ resources to various account stakeholders</b> based on <b>customer knowledge</b>	Plans <b>patient-centric dialogue with multiple types of influencers</b> within the account to successfully implement/ sustain GSK-approved solution(s)	<b>Plans how to ask for agreement from the customer to prescribe/ purchase a GSK product linked to a customer's need</b> for the appropriate patient or <b>plans how to ask for agreement from the customer</b> to take action that <b>advances the customer toward a GSK solution linked to his/ her need</b>	Prepares a <b>pre-engagement plan with specific questions that moves the customer to the next phase on the decision cycle</b>	Prepares (purposeful) MCE-based questions to understand the <b>customer's current state and desired state</b>




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# CUSTOMER ENGAGEMENT IMPLEMENT

	Executes Customer Plan		Patient-Centric Dialogue		Customer Discovery/Insightful Questioning	
	  		 		  	
<b>Exceptional</b>	<b>Leads the execution of ongoing plan with key stakeholders for priority accounts, driving measurable outcomes</b>	<b>Implements adapted strategy with specific measures of success</b> in response to external or internal changes <b>aligning to customer's needs</b>	Executes a plan with matrix partners that includes measures of success/accountability for <b>utilization of a GSK-approved solution aligned to patient-centric needs, affecting multiple geographies/territories</b>	Collaborates with matrix partner to <b>implement strategy</b> that creates <b>access to the customer/account</b>	<b>Implements GSK-approved solution(s) aligned to the explicit need(s) of multiple stakeholders</b> in the account	<b>Leads effort with GSK matrix partners to identify opportunities or mitigate barriers to the implementation of a GSK solution</b>
<b>Distinguished</b>	<b>Executes tasks agreed upon</b> in the patient/customer-centric strategic plan, maximizing opportunities	Executes an <b>account plan</b> aligned to the <b>customer's identified goals, priorities, and initiatives</b>	<b>Responds to customer questions/concerns by first identifying the type of concern then answering appropriately (MILD &amp; EARS)</b>	Engages in dialogue that <b>reframes the conversation</b> to an appropriate customer/patient-focused solution aligned to an identified need	<b>Asks various types of insightful questions (problem/implication/need-payoff)</b> to develop explicit need	Uncovers <b>key customer's decision criteria for implementing</b> potential GSK solutions by asking insightful questions
<b>Proficient</b>	<b>Executes customer engagement plan aligning brand strategy and</b> customer-centric goals	<b>Follows up</b> with key account stakeholders to ensure <b>pull-through of appropriate patient/customer-centric solutions aligned to identified needs</b>	Engages in <b>patient-centric dialogue</b> with <b>multiple types of influencers</b> within the account to <b>successfully implement/sustain GSK-approved solution(s)</b>	<b>Seeks and gains agreement from the customer to prescribe/purchase a GSK product linked to a customer's need</b> for the appropriate patient or <b>seeks and gains an agreement from the customer</b> to take action that <b>advances the customer toward a GSK solution linked to his/her need</b>	Asks (purposeful) insightful questions <b>that move the customer to the next phase on the decision cycle</b>	Asks (purposeful) insightful questions to uncover <b>the customer's current state and desired state</b>




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# SCIENTIFIC KNOWLEDGE PREPARE

	Brand Strategy 	Disease State 	Marketplace 
Exceptional	Plans for a district/regional initiative to improve upon how team aligns brand strategy with identified customer needs	Discusses anatomy and pathology of the disease state with FLL in relation to GSK product labels aligned to customer needs	Identifies and articulates opportunities and gaps for GSK product(s) based on understanding of customers use of competitive product(s)
Distinguished	Shares with FLL how brand strategy aligns with the identified business unit objectives and customer need(s)	Describes approved treatment guidelines/pathways/ standards of care before key customer interactions	Discusses with FLL the reasons why a customer uses GSK product(s) with a specific patient segment
Proficient	Accurately articulates the brand strategy with FLL for each product within portfolio	Prepares for scientific discussion by proactively practicing with FLL for anticipated customer interaction	Discusses with FLL how a customer is using the GSK product (NOTE: GSK sales professionals should not create or make recommendations or suggestions as to where a GSK product should be used within a customer's treatment protocol. GSK sales professionals should not include or use customer protocols as part of their discussions with customers.)

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# SCIENTIFIC KNOWLEDGE IMPLEMENT

	<b>Brand Strategy</b> 	<b>Disease State</b> 	<b>GSK-Approved Resources</b> 
<b>Exceptional</b>	Leads the agreed-upon district/regional initiative to improve the alignment of brand strategy with identified customer needs	Appropriately leverages a GSK matrix partner or resource to meet a customer's specific scientific need	Facilitates discussion within the district/region to improve utilization of GSK HQ-approved resources aligned to BU objectives
<b>Distinguished</b>	Appropriately utilizes GSK products/resources aligning brand strategy to meet a customer's need	Engages the customer in appropriate disease state dialogue to understand his/her specific treatment goals	Effectively uses HQ-approved resources to address customer's clinical explicit need
<b>Proficient</b>	Appropriately positions a GSK product aligned to brand strategy	Asks appropriate disease state-related questions to open dialogue and uncover customer needs	Demonstrates the ability to use relevant portions of the PI/HQ-approved resource related to an identified customer need with customers of various responsibilities for patient care, always providing fair balance in product discussions

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# SALES PROFESSIONAL/ACCOUNT MANAGER

## RED ZONE BEHAVIORS






These behaviors can be exhibited in any of the competency areas and are not all-inclusive.

TRANSPARENCY	RESPECT	INTEGRITY	PATIENT FOCUS
Not providing the complete Prescribing Information for each product discussed on every sales call	Harassment, retaliation or discrimination: Any potential concerns or observations must be reported to the Speak Up Integrity Line	Soliciting an off-label question: Where off-label questions are initiated by the customer, the SOP for answering them should be followed	Sales data should be used consistent with the individual Territory Sales Data Use policy
Having knowledge of or observing a CPP or other policy violation and not reporting. All violations must be reported to the Speak Up Integrity Line	1) Providing any business service to the customer (eg, processing paperwork for a customer) 2) Linking our efforts to improving the customer's business	Use of materials not approved by GSK or misuse of approved materials. Use of homemade "bread". All materials should be used according to GSK instructions	Selling a product without training certification
Not providing fair balance: Each product sales call should contain a balance of efficacy and safety information	Marketing the spread	Falsification of records or other company documents	Quid pro quo arrangements
	Encouraging or directing others to engage in Red Zone Behaviors	Not using "Write Right" principles when creating call notes, emails, or other documents and communications	Not providing fair balance: Each product sales call should contain a balance of efficacy and safety information.
		Linking use of our products/services to compensation opportunities for customers	Off-label sales and promotion: Only approved products and their indications should be discussed.
		Off-label sales and promotion: Only approved products and their indications should be discussed	Not providing the complete prescribing information for each product discussed on every sales call
		Misuse of samples, coupons and vouchers; Samples, coupons and vouchers should be used in the manner instructed by GSK (e.g., should not be sold or bartered, and should not be left with excluded specialties)	Not providing accurate product information during discussions with customers
		Inappropriately comparing competitor products.	Failure to report an adverse event
		Selling a product without training certification	
		Failure to submit appropriate documentation and receipts for expenses	
		Failure to adhere to the Patient First integrity expectations	
		Failure to safeguard company information, technology resources, and personally identifiable information	










This is not intended to be an exhaustive list but is presented for illustration purposes. All employees are expected to understand and comply with CPPs and all other policies and procedures established by GSK – as well as exhibit GSK Values in all that they do.

# BUSINESS ACUMEN **PREPARE**

	<b>Business Planning</b> 		<b>Account Management</b> 		<b>Positioning GSK-Approved Resources</b> 	
<b>Exceptional</b>	<b>Incorporates insights from multiple stakeholders</b> (eg, FLLs, FBMs, provider market, payer, CMLs) regarding trends in local business/healthcare environment to develop <b>specific planned advances and action steps</b> in their Strategic Account Plan impacting multiple territories	<b>Proactively takes initiative to provide relevant market or customer insight</b> that is used in the development of Regional Business Plan(s) and SLL matrix partner plan (s)	<b>Builds relationships at the C-Suite level that advocate implementation of GSK-approved patient-centric solutions</b>	<b>Plans to align multiple GSK matrix partners within various levels of an account</b> to implement a GSK-approved solution aligned to the high-potential opportunity	<b>Develops a sustained communication plan with GSK matrix partners</b> utilizing current BI tools <b>to develop advances aligning GSK and the customer's priorities</b>	<b>Plans implementation of how GSK-approved resources meet mutual business objectives of matrix partners</b> aligned to high-potential opportunities
<b>Distinguished</b>	<b>Builds tactics into Strategic Account Plans/Matrix Account Plans</b> aligning to identified local business/healthcare trends that <b>impact their accounts</b>	<b>Plans for discussion with matrix partners around specific business acumen concepts that may impact their Strategic Account Plans/Matrix Account Plans</b>	<b>Develops planned action steps</b> around the <b>customer's current priorities and decision criteria</b>	<b>Aligns multiple account roles based on their stage in the decision cycle</b> to the identified high-potential opportunity for planning project implementation	<b>Identifies how to align customer's explicit needs to GSK's product(s)/approved resources to pull through brand and/or non-branded strategy</b> at the individual territory level	<b>Plans allocation of GSK-approved resources to multiple levels of the account in the call plan</b>
<b>Proficient</b>	<b>Develops Strategic Account Plans</b> based on customer understanding, insights, and <b>detailed analysis</b> of account data	<b>Demonstrates to FLL the ability to explain key business acumen concepts in relation to his/her business</b>	<b>Discusses with FLL the impact of the environmental, clinical, organizational, and financial priorities of key customers/accounts</b>	<b>Identifies and prioritizes key customers</b> across different levels of the account that <b>will impact the business</b>	<b>In preparation for a call, explains to FLL relevant GSK-approved resources aligned to the customer's explicit need</b>	<b>Prioritizes allocation of GSK-approved resources, including time</b> , based on potential business impact









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# BUSINESS ACUMEN IMPLEMENT

	Executes Business Plan		Account Management		Positioning GSK-Approved Resources	
	   		 		  	
<b>Exceptional</b>	<b>Implements strategic</b> planning sessions with multiple matrix partners <b>capitalizing/executing on shared opportunities across multiple regions or geographies</b>	<b>Leads matrix implementation effecting multiple levels within the account</b> based on an identified high-potential opportunity	<b>Implements GSK-approved patient-centric solutions aligned with C-Suite directive</b>	<b>Leads initiatives</b> that will enable GSK matrix partners to build <b>strategic relationships</b> with key customers within an account aligned to the high-potential opportunity	<b>Implements a sustained communication plan with GSK matrix partners</b> utilizing current BI tools to <b>develop advances aligning GSK and the customer's priorities</b>	Leads the initiative to meet <b>mutual business objectives</b> of matrix partners <b>aligned to high-potential opportunities</b>
<b>Distinguished</b>	Executes <b>tactics to review account plans</b> aligning to identified local business/healthcare trends that <b>impact his/her accounts</b>	Leads discussion with matrix partners <b>around business acumen concepts that impact their Strategic Account Plans/Matrix Account Plans</b>	Executes <b>planned action steps</b> aligned to the <b>customer's current priorities and decision criteria</b>	<b>Implements planned project aligning multiple account roles based on their stage in the decision cycle</b> to the identified high-potential opportunity	<b>Demonstrates alignment of customer's explicit needs to GSK's product(s)/approved resources</b> to pull through brand and/or non-branded strategy	Incorporates GSK-approved resources <b>identified in the call plan at multiple levels within account</b>
<b>Proficient</b>	<b>Continuously implements and updates</b> the Strategic Account Plan and <b>incorporates lead and lag indicators</b> into their <b>visual controls</b>	Incorporates <b>relevant</b> business acumen concepts into conversations with customers <b>to develop an advance</b>	Engages key customers in dialogue to understand their <b>environmental, clinical, organizational, and financial priorities</b>	<b>Gains and documents advances</b> with key customers/accounts within GSK 360	Engages customer(s) in a dialogue regarding GSK-approved resources/GSK brand information <b>relevant to the customer's role</b>	<b>Allocates GSK-approved resources, including time</b> , based on potential business impact









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# CUSTOMER ENGAGEMENT **PREPARE**

	<b>Customer Planning</b>   		<b>Patient-Centric Dialogue</b>  		<b>Customer Discovery/Insightful Questioning</b>   	
<b>Exceptional</b>	<b>Develops ongoing strategy</b> to obtain relevant account insights from both the customer and GSK matrix partners <b>that translate into patient-centric actions by the customer</b>	<b>Builds sustainable, comprehensive (ASMA) plan aligning customer's and GSK's objectives</b> integrating relevant stakeholders/ matrix partners	Plans for <b>relevant patient-centric dialogue to engage C-Suite, or highest level administration within an account</b> based on understanding of their needs/priorities that are aligned to an appropriate GSK solution	Plans for <b>engagement session with multiple decision makers/ influencers in conjunction with decision makers within the account to create alignment</b> around a GSK HQ-approved solution that results in an advance	<b>Creates a plan based on a top down approach</b> utilizing information obtained from customers for implementation of a GSK HQ-approved solution	<b>Aligns the decision criteria of multiple key customers</b> within an account resulting in <b>implementation of a GSK-approved solution</b>
<b>Distinguished</b>	<b>Creates specific, measureable plan</b> to build relationships with key decision makers/ influencers in conjunction with decision makers <b>across multiple levels in the account</b>	<b>Develops measureable, time-bound advances</b> and alternative advances aligned to the Opportunity Plan	Plans a patient-centric dialogue <b>based on the call continuum, that aligns customer's needs</b> with GSK solutions	Prepares <b>call plan for each decision maker/ influencer in conjunction with a decision maker to uncover/confirm priority of customer opportunities</b> based on insights from GSK matrix partners	Shares with FLL <b>insightful questioning strategy</b> to move customer <b>further on the Decision Cycle</b> based on the customers <b>Implied or Explicit need</b>	Plans Insightful questions relative to <b>customer's decision criteria</b> demonstrating the ability to plan for differing responses
<b>Proficient</b>	Identifies and <b>creates a strategic plan</b> to access customers and <b>documents in Strategic Account Plan/Matrix Account Plan</b>	Develops customer-centric call plan <b>aligned to a specific Opportunity Plan</b> outlined in the Strategic Account Plan <b>with objectives and questions for each decision maker/ influencer in conjunction with a decision maker</b>	Plans patient-centric dialogue to help <b>identify customer's challenges and priorities</b>	Creates a plan to build patient-centric relationships with <b>key decision makers/influencers in conjunction with decision makers across account</b>	<b>Shares with FLL a variety of situation, problem, implication, and need-payoff</b> questions to develop explicit need	Develops insightful questions to gain understanding of the <b>customer's decision criteria</b>




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# CUSTOMER ENGAGEMENT **IMPLEMENT**

	Executes Customer Plan		Patient-Centric Dialogue		Customer Discovery/Insightful Questioning	
	  		 		  	
<b>Exceptional</b>	Executes strategy gaining relevant account insights from both the customer and GSK matrix partners resulting in patient-centric actions by the customer	Executes sustainable, comprehensive (ASmart) plan aligning customer's and GSK's objectives, integrating relevant stakeholders/ matrix partners	Engages C-Suite, or highest level administration within an account, in relevant patient-centric dialogue aligning their needs/priorities to an appropriate GSK solution	Executes engagement session with multiple decision makers/ influencers in conjunction with decision makers at various levels within the account creating alignment and advancing the GSK HQ-approved solution	Executes plan for a <u>top-down</u> approach for utilization of a GSK HQ-approved solution based on information obtained from customer	Implements GSK-approved solution aligned to the decision criteria of multiple key customers, in multiple departments within an account
<b>Distinguished</b>	Implements the measureable plan while leveraging relationships with key decision makers/influencers in conjunction with decision makers across multiple levels in the account	Attains measureable, time-bound advances/ alternative advances aligned to the Opportunity Plan	Engages in dialogue resulting in customer's agreement that the GSK solution aligns to his/her need(s)	Executes on a Strategic Account Plan for each decision maker/ influencer in conjunction with a decision maker uncovering/confirming priority of customer opportunities	Implements strategic plan to move customer further on the decision cycle based on implied or explicit need	Asks insightful questions relative to the customer's decision criteria demonstrating the ability to appropriately respond
<b>Proficient</b>	Executes strategic plan to access customers and documents in the Strategic Account Plan/ Matrix Account Plan	Regularly updates FLL/ appropriate matrix partners on customer-centric call plan/Opportunity Plan outlined in the Strategic Account Plan	Advances the call through patient-centric dialogue by understanding/ confirming customer challenges	Engages with multiple decision makers/influencers in conjunction with decision makers across different levels or departments in the account	Asks a variety of situation, problem, implication, and need-payoff questions to develop explicit need	Asks insightful questions to gain understanding of the customer's decision criteria




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# SCIENTIFIC KNOWLEDGE PREPARE

	Brand Strategy 	Disease State 	Marketplace 
Exceptional	Plans an <b>administrative-level</b> approach to implement a <b>customer-aligned, GSK-approved branded solution in multiple departments/sites of care</b> within account	Plans a <b>top-down/administrative-level approach</b> to implement a <b>customer-aligned, GSK-approved clinical solution documented</b> in the SAP	<b>Develops plan</b> identifying opportunities and gaps for GSK product <b>based on changes in the regional marketplace</b>
Distinguished	Develops in the SAP or appropriate planning tool a plan to <b>pull through all portfolio brand strategies aligned to the customer's needs</b>	Verbalizes to FLL-approved <b>treatment/guidelines/pathways/standards of care</b> in preparation for customer interactions	Demonstrates understanding of <b>marketplace changes and their potential implications</b> on customer's clinical needs
Proficient	<b>Demonstrates an understanding of GSK product strategies</b> through dialogue with FLL	Prepares for scientific discussion by practicing for <b>customer's anticipated interaction with FLL, based on call continuum/stage of decision cycle</b>	<b>Discusses with FLL how key customers use GSK products/solutions across assigned portfolio</b> (Note: GSK professionals should not create or make recommendations or suggestions as to where a GSK product should be used in a customer's protocols as part of their discussions with customers.)

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# SCIENTIFIC KNOWLEDGE IMPLEMENT

	Brand Strategy 	Disease State 	GSK-Approved Resources 
Exceptional	Executes across multiple sites/departments an administrative-level directive approach to implementing a customer-aligned, GSK-approved branded solution	Implements a GSK-approved clinical solution aligned to customer needs across multiple accounts with a <u>top-down</u> /administration-level approach	Implements a strategy connecting multiple GSK stakeholders with a variety of decision makers within account resulting in an advance for the GSK-approved/aligned solution
Distinguished	Implements plan to pull through portfolio strategy SAP/call plan/accountability board	Engages multiple clinical personnel to deliver a patient-centric solution aligned to the customer's needs	Effectively utilizes GSK resources to pull through brand strategies aligned to the customer's specific needs
Proficient	Appropriately positions GSK products/resources aligned to brand strategy with customers of various responsibilities	Engages in relevant scientific or disease state discussion with the customer based on the call continuum/stage of decision cycle	Strategically uses relevant portions of PI/HQ-approved resource related to an identified need with customers of various responsibilities for patient care, always providing fair balance

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# SALES PROFESSIONAL/ACCOUNT MANAGER

## RED ZONE BEHAVIORS

GRADE 7AM












These behaviors can be exhibited in any of the competency areas and are not all-inclusive.

TRANSPARENCY	RESPECT	INTEGRITY	PATIENT FOCUS
Not providing the complete Prescribing Information for each product discussed on every sales call	Harassment, retaliation or discrimination: Any potential concerns or observations must be reported to the Speak Up Integrity Line	Soliciting an off-label question: Where off-label questions are initiated by the customer, the SOP for answering them should be followed	Sales data should be used consistent with the individual Territory Sales Data Use policy
Having knowledge of or observing a CPP or other policy violation and not reporting. All violations must be reported to the Speak Up Integrity Line	1) Providing any business service to the customer (eg, processing paperwork for a customer) 2) Linking our efforts to improving the customer's business	Use of materials not approved by GSK or misuse of approved materials. Use of homemade "bread". All materials should be used according to GSK instructions	Selling a product without training certification
Not providing fair balance: Each product sales call should contain a balance of efficacy and safety information	Marketing the spread	Falsification of records or other company documents	Quid pro quo arrangements
	Encouraging or directing others to engage in Red Zone Behaviors	Not using "Write Right" principles when creating call notes, emails, or other documents and communications	Not providing fair balance: Each product sales call should contain a balance of efficacy and safety information.
		Linking use of our products/services to compensation opportunities for customers	Off-label sales and promotion: Only approved products and their indications should be discussed.
		Off-label sales and promotion: Only approved products and their indications should be discussed	Not providing the complete prescribing information for each product discussed on every sales call
		Misuse of samples, coupons and vouchers; Samples, coupons and vouchers should be used in the manner instructed by GSK (e.g., should not be sold or bartered, and should not be left with excluded specialties)	Not providing accurate product information during discussions with customers
		Inappropriately comparing competitor products.	Failure to report an adverse event
		Selling a product without training certification	
		Failure to submit appropriate documentation and receipts for expenses	
		Failure to adhere to the Patient First integrity expectations	
		Failure to safeguard company information, technology resources, and personally identifiable information	










This is not intended to be an exhaustive list but is presented for illustration purposes. All employees are expected to understand and comply with CPPs and all other policies and procedures established by GSK – as well as exhibit GSK Values in all that they do.

# BUSINESS ACUMEN **PREPARE**

	Business Planning <div>     </div>		Account Management <div>   </div>		Positioning GSK-Approved Resources <div>    </div>	
<b>Exceptional</b>	<b>Plans initiative(s) to address trends</b> in the local business/health care environment that may impact accounts <b>across multiple geographies/territories</b>	<b>Develops a plan with specific objectives to mentor</b> others on how concepts learned in business acumen training apply to his/her business	<b>Develops a communication plan to share</b> customer insights with GSK matrix partners who access the account	<b>Develops account plan</b> with matrix partners <b>focusing on decision makers and influencers in conjunction with decision makers in the account</b> to embed/sustain GSK-approved solution(s)	<b>Develops follow-up plan with decision makers and influencers in conjunction with decision makers</b> in key accounts to <b>embed and sustain</b> the implemented GSK-approved resource	Plans with matrix partner to implement GSK-approved resources <b>to meet mutual GSK objectives aligned to customer's explicit need(s) within multiple key accounts</b>
<b>Distinguished</b>	<b>Identifies trends</b> in the local business/health care environment and how they may impact <b>accounts across multiple geographies/territories</b>	Shares with the FLL how concepts learned <b>in the self-identified training apply to his/her current business</b>	<b>Discusses with FLL</b> key customer's <b>decision criteria</b> for the customer's current priorities	<b>Plans to leverage decision makers and influencers in conjunction with decision makers at various levels</b> within an account to implement a GSK-approved solution	Identifies <b>how to align customer's explicit need(s) to GSK's product(s)/approved resources to pull through brand and/or non-branded strategy</b>	Identifies how to align GSK's products and approved resources <b>to pull through brand strategy at the territory level</b>
<b>Proficient</b>	Develops a business plan <b>based on customer understanding, insights, and detailed analysis of account data aligned to BU objectives</b>	<b>Self-identifies</b> training needs, <b>based on professional development, beyond required Business Acumen curriculum</b>	<b>Discusses with FLL</b> the environmental, clinical, organizational, and financial priorities of <b>key customers, as appropriate</b>	Identifies and prioritizes key customers <b>across different levels of the account that will impact the business</b>	In preparation for a call, explains to FLL how the <b>planned GSK-approved resources align to a customer need</b>	<b>Prioritizes allocation of GSK-approved resources, including time</b> , based on potential business impact aligned with BU objectives









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# BUSINESS ACUMEN IMPLEMENT

	Executes Business Plan		Account Management		Positioning GSK-Approved Resources	
	   		 		  	
<b>Exceptional</b>	<b>Leads initiative(s) to address trends</b> in local business/health care environment that impact across multiple geographies/territories	<b>Mentors</b> others to understand how concepts learned in Business Acumen training <b>apply to their business, meeting the outlined objectives of the plan</b>	<b>Executes appropriate initiatives based on the communication plan</b> with GSK matrix partners who access the account	<b>Executes account plan</b> with matrix partners <b>focusing on decision makers and influencers in conjunction with decision makers in the account</b> to embed/sustain GSK-approved solution(s)	<b>Pulls through the implementation</b> of the GSK-approved resource, ensuring <b>sustained alignment with customer's explicit need</b>	Collaborates with matrix partner to implement GSK-approved resources to <b>meet mutual GSK objectives aligned to customer's explicit need(s) within multiple key accounts</b>
<b>Distinguished</b>	<b>Adjusts implementation of business plan to address trends in local business/health care environment</b> that impact accounts across multiple geographies/territories	Incorporates concepts learned in Business Acumen training <b>during a customer interaction</b>	<b>Aligns</b> GSK products/resources/initiatives to <b>customer's decision criteria</b>	<b>Leverages professional relationship with decision makers or influencers in conjunction with decision makers at various levels</b> within an account to implement a GSK-approved solution	Implements GSK-approved resource(s) <b>aligned to customer's explicit need(s)</b>	<b>Measures the impact of resource utilization upon BU objectives</b> and pull-through of brand strategy, <b>adjusting if needed</b>
<b>Proficient</b>	<b>Implements a business plan based on customer insights</b> and a detailed analysis of account data <b>aligning to BU objectives</b>	<b>Completes</b> training based on professional development <b>needs beyond required Business Acumen curriculum</b>	<b>Engages a key customer in dialogue to understand</b> their environmental, clinical, organizational, and financial priorities as appropriate	<b>Gains and documents advances with key customers</b> within GSK360 for priority accounts	<b>Utilizes relevant GSK-approved resource(s) aligned</b> to customer's need	<b>Utilizes GSK-approved resources, including time,</b> based on potential business impact aligned with BU objectives









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# CUSTOMER ENGAGEMENT **PREPARE**

	<b>Customer Planning</b>   		<b>Patient-Centric Dialogue</b>  		<b>Customer Discovery/Insightful Questioning</b>   	
<b>Exceptional</b>	<b>Builds sustainable, comprehensive (ASmart) plan aligning customer's and GSK's objectives</b> integrating relevant stakeholders/ matrix partners	<b>Develops ongoing strategy to obtain relevant account insights</b> from both the customer and GSK matrix partner(s) to align customer needs with GSK-approved solution	Takes initiative to develop a plan using GSK-approved resources <b>to enhance patient-centric dialogue within district/region</b>	Develops insights around customer <b>barriers, decision criteria, or competing priorities</b> that may impede full implementation of a <b>specific GSK solution</b>	<b>Develops plan to align</b> appropriate GSK-approved solutions with customer's explicit need(s) in <b>multiple key accounts</b>	<b>Plans (purposeful) insightful questions to maintain knowledge of where key customers are in the decision cycle</b> through the implementation phase
<b>Distinguished</b>	Based on all available information, including call continuum, <b>articulates desired customer advance(s) planning for alternative advances</b>	<b>Creates specific, measureable plan</b> to build relationships with key decision makers/ influencers in conjunction with decision makers <b>within the account</b>	Plans patient-centric dialogue to <b>motivate a customer to have a desire to change or move forward</b> with a patient-centric solution	<b>Plans follow-through</b> with customer to ensure that the GSK solution met the customer's <b>explicit need</b>	Prepares problem, implication, or need-payoff questions to <b>develop customer's explicit need</b>	<b>Based on a call continuum</b> , plans insightful questions that <b>help to align customers need(s) to a GSK-approved solution</b>
<b>Proficient</b>	<b>During pre-engagement planning, articulates ASmart objective(s)</b> to advance the call based on the anticipated needs of the customer	<b>Articulates how the key influencers impact the decision-making process</b> within the customer's account	Discusses with FLL a patient-centric dialogue planned <b>to advance the call</b>	<b>Plans how to ask for agreement from the customer to prescribe/ purchase a GSK product linked to a customer's need for the appropriate patient</b> or <b>plans how to ask for agreement from the customer</b> to take action that <b>advances the customer toward a GSK solution linked to his/ her need</b>	Develops insightful questions to <b>uncover the customer's position in the decision cycle</b> as it relates to a <b>dimension of need</b>	Prepares a <b>comprehensive pre-call plan</b> to develop specific questions to <b>fully understand the customer's needs and priorities</b>




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# CUSTOMER ENGAGEMENT **IMPLEMENT**

	Executes Customer Plan		Patient-Centric Dialogue		Customer Discovery/Insightful Questioning	
	  		 		  	
<b>Exceptional</b>	<b>Executes sustainable, comprehensive (ASmart) plan aligning customer's and GSK's objectives</b> , integrating relevant stakeholders/ matrix partners	<b>Executes ongoing strategy based on relevant account insights</b> from both the customer and GSK matrix partners <b>resulting in an advance toward implementation</b> of a GSK-approved solution	Leads initiative using GSK-approved resources to <b>enhance patient-centric dialogue within district/ region</b>	<b>Shares insights with GSK leadership/ marketing</b> around customer's barriers to full implementation of a specific GSK solution <b>that results in national impact</b>	<b>Implements</b> appropriate GSK-approved solutions <b>aligned with customer's explicit need(s) in multiple key accounts</b>	Follows up by <b>asking (purposeful) insightful questions to maintain knowledge of where key customers are</b> in the decision cycle through the implementation phase
<b>Distinguished</b>	<b>Gains</b> (planned) customer <b>desired or alternative advance</b>	<b>Implements the measureable plan</b> while leveraging relationships with key decision makers/ influencers in conjunction with decision makers <b>within the account</b>	Engages in a patient-centric dialogue that <b>motivates a customer to have a desire to change or move forward</b> with a patient-centric solution	<b>Follows through</b> with customer to ensure that the GSK solution met the customer's <b>explicit need</b>	<b>Asks</b> problem, implication, or need-payoff questions that <b>allow customers to express explicit need</b>	Asks insightful questions <b>that align the customer's need(s) to a GSK-approved solution</b>
<b>Proficient</b>	<b>Engages the customer based on call objectives</b> demonstrating flexibility in response to the customer dialogue	Engages with <b>multiple influencers or decision makers to advance the call</b>	Engages the customer in a patient-centric dialogue designed to <b>advance the call</b>	<b>Seeks and gains agreement from the customer to prescribe/ purchase a GSK product linked to a customer's need</b> for the appropriate patient or <b>seeks and gains an agreement from the customer</b> to take action that <b>advances the customer toward a GSK solution linked to his/her need</b>	Asks insightful questions to <b>uncover the customer's position in the decision cycle</b> as it relates to a dimension of need	<b>Asks insightful questions to uncover environmental, clinical, financial, and organizational needs</b> known and not known to the customer




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# SCIENTIFIC KNOWLEDGE **PREPARE**

	Brand Strategy 	Disease State 	Marketplace 
<b>Exceptional</b>	Plans for a district/regional initiative to improve upon how team aligns brand strategy with identified customer needs	Discusses anatomy and pathology of the disease state with FLL in relation to GSK product labels aligned to customer needs	Initiates collaboration to discuss opportunities and gaps for GSK products in the local marketplace based on knowledge of competitors in the therapeutic area
<b>Distinguished</b>	Shares with FLL how brand strategy aligns with the identified business unit objectives and customer's explicit need(s)	Describes approved treatment guidelines/pathways/standards of care to FLL in preparation for customer interactions	Discusses with FLL the reasons why a customer uses GSK product(s) with a specific patient segment
<b>Proficient</b>	Accurately articulates the brand strategy with FLL for each product within portfolio	Prepares for scientific discussion by practicing for anticipated customer's interaction with FLL, based on call continuum	Discusses with FLL how key customers use GSK products/HQ-approved resources across assigned portfolio (NOTE: GSK sales professionals should not create or make recommendations or suggestions as to where GSK products should be used within a customer's treatment protocol. GSK sales professionals should not include or use customer protocols as part of their discussions with customers.)

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# SCIENTIFIC KNOWLEDGE IMPLEMENT

	Brand Strategy 	Disease State 	GSK-Approved Resources 
Exceptional	Leads the agreed-upon district/regional initiative to improve the alignment of brand strategy with identified customer needs	Appropriately leverages a GSK matrix partner or resource to meet a customer's specific scientific need	Facilitates discussion within the district/region to improve utilization of GSK HQ-approved resources aligned to BU objectives
Distinguished	Appropriately utilizes GSK products/resources aligning brand strategy to meet a customer's explicit need	Delivers a patient-centric solution through a clinical discussion aligned to the customer's explicit needs, providing fair balance in product discussions	Effectively uses HQ-approved resources to address customer's clinical explicit need
Proficient	Appropriately positions GSK products/resources aligned to brand strategy with customers of various responsibilities	Engages in a patient-centric scientific or disease state discussion with the customer based on the call continuum, providing fair balance in product discussions	Uses relevant portions of the PI/HQ-approved resource in response to a customer's identified need with customers of various responsibilities for patient care, always providing fair balance in product discussions

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# SALES PROFESSIONAL/ACCOUNT MANAGER

## RED ZONE BEHAVIORS






These behaviors can be exhibited in any of the competency areas and are not all-inclusive.

TRANSPARENCY	RESPECT	INTEGRITY	PATIENT FOCUS
Not providing the complete Prescribing Information for each product discussed on every sales call	Harassment, retaliation or discrimination: Any potential concerns or observations must be reported to the Speak Up Integrity Line	Soliciting an off-label question: Where off-label questions are initiated by the customer, the SOP for answering them should be followed	Sales data should be used consistent with the individual Territory Sales Data Use policy
Having knowledge of or observing a CPP or other policy violation and not reporting. All violations must be reported to the Speak Up Integrity Line	1) Providing any business service to the customer (eg, processing paperwork for a customer) 2) Linking our efforts to improving the customer's business	Use of materials not approved by GSK or misuse of approved materials. Use of homemade "bread". All materials should be used according to GSK instructions	Selling a product without training certification
Not providing fair balance: Each product sales call should contain a balance of efficacy and safety information	Marketing the spread	Falsification of records or other company documents	Quid pro quo arrangements
	Encouraging or directing others to engage in Red Zone Behaviors	Not using "Write Right" principles when creating call notes, emails, or other documents and communications	Not providing fair balance: Each product sales call should contain a balance of efficacy and safety information.
		Linking use of our products/services to compensation opportunities for customers	Off-label sales and promotion: Only approved products and their indications should be discussed.
		Off-label sales and promotion: Only approved products and their indications should be discussed	Not providing the complete prescribing information for each product discussed on every sales call
		Misuse of samples, coupons and vouchers; Samples, coupons and vouchers should be used in the manner instructed by GSK (e.g., should not be sold or bartered, and should not be left with excluded specialties)	Not providing accurate product information during discussions with customers
		Inappropriately comparing competitor products.	Failure to report an adverse event
		Selling a product without training certification	
		Failure to submit appropriate documentation and receipts for expenses	
		Failure to adhere to the Patient First integrity expectations	
		Failure to safeguard company information, technology resources, and personally identifiable information	

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# BUSINESS ACUMEN **PREPARE**

	<b>Business Planning</b> 		<b>Account Management</b> 		<b>Positioning GSK-Approved Resources</b> 	
<b>Exceptional</b>	<b>Shares</b> account/market insights <b>with leadership, matrix partners and/or HQ Teams</b> that could be used for strategy development	Works with <b>matrix partners to prepare a plan</b> for pull-through on jointly identified pull-through/access opportunities	Creates both a planned <b>primary and secondary</b> advance	<b>Develops a plan to share</b> summarized <b>customer business insights with internal colleagues</b> (eg, Marketing, CMO, contract holders, trade, value stream mapping)	<b>Prepares a strategy</b> to use <b>approved resources</b> to meet the <b>unique goals/needs of customers</b>	Plans implementation of how GSK-approved resources <b>meet mutual business objectives of matrix partners</b> aligned to high-potential opportunities
<b>Distinguished</b>	Aligns geographic/account business plans <b>to higher level organizational objectives</b> (matrix partners, BU, affiliate)	Plans agreed-upon <b>regularly scheduled meetings</b> to <b>jointly identify</b> pull-through/ <b>access opportunities</b>	Shares with leadership <b>where the customer is in the decision cycle</b>	<b>Analyzes customer insights and priorities</b> as they relate to his/her business and/or contracts	Discusses how to <b>position and align approved resources</b> that are relevant to needs/goals of the <b>customer</b>	Plans allocation of GSK-approved resources to <b>multiple levels of the account</b> in the <b>call plan</b>
<b>Proficient</b>	<b>Incorporates insights from colleagues</b> (FLLs, FBM, FVP, etc) into geographic/account business plan	<b>Analyzes key account opportunities within the marketplace</b> for pull-through/access	Develops an <b>objective/opportunity in the call plan</b>	Discusses the GSK message regarding <b>access and contract information</b> (eg, rebate summaries)	Discusses with FLL which approved <b>resources are relevant</b> to respond to the <b>needs/goals of the customer</b>	<b>Prioritizes allocation of GSK-approved resources, including time</b> , based on potential business impact

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Sets direction  
and inspire



Work across  
boundaries



Release  
energy



Develop  
capabilities  
and talent






Drive  
Performance



Live our  
values








GRADE 6

# BUSINESS ACUMEN IMPLEMENT

	Executes Business Plan		Account Management		Positioning GSK-Approved Resources
					
<b>Exceptional</b>	Engages leadership, matrix partners and/or HQ teams that help <b>develop a business case</b> for an alternative approach to a customer's need	Collaborates with matrix partners to <b>implement</b> appropriate pull-through/ <b>access</b> activities with <b>specific objectives</b>	<b>Gains a primary advance or secondary advance</b>	Shares customer business insights with matrix partners to <b>improve processes and/or outcomes</b> (eg, Marketing, CMO, contract holders, trade, value stream mapping)	<b>Implements strategy by utilizing approved resources</b> aligned to the customer's explicit need
<b>Distinguished</b>	<b>Discusses</b> with team and <b>matrix partners the relevance of business strategies</b> to the account	<b>Utilizes matrix partners</b> meetings to identify opportunities and synergies	<b>Communicates effectively</b> with the customer <b>based on where the customer is in the decision cycle</b>	<b>Gathers actionable insights</b> and priorities from customers as they relate to their business and/or contracting needs	Delivers resource solution <b>aligned</b> to the <b>unique goals</b> of the customer
<b>Proficient</b>	Implements account <b>business reviews with colleagues</b> (eg, FLLs, FBMs, FVPs)	<b>Educates GSK matrix partners on account information</b> (eg, formulary positioning) that contributes to achievement of regional goals	Demonstrates the <b>objective/opportunity in the call plan</b> by utilizing information available from the Opportunity Plan	<b>Delivers GSK messages</b> regarding product access or communicates ongoing contract information to customer (eg, rebate summaries)	<b>Responds to the customer with relevant approved resources</b> , involving appropriate matrix partners as needed









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# CUSTOMER ENGAGEMENT **PREPARE**

	<b>Customer Planning</b> 		<b>Patient-Centric Dialogue</b>   		<b>Customer Discovery/Insightful Questioning</b>   	
<b>Exceptional</b>	Develops a plan to utilize <b>customer stated prioritized goals to advance an Opportunity Plan</b>	<b>Develops relevant advances and alternative advances</b> aligned to the Opportunity Plan	<b>Develops ongoing strategy to obtain account insights from multiple contacts within account</b> that lead to a broader understanding of the customer	Develops <b>specific questions or call plans</b> to <b>uncover/confirm</b> the <b>decision cycle or criteria</b> for individual decision makers/influencers in conjunction with decision makers	Understands how <b>evolving external environmental events may impact the market, customers, and GSK</b>	Develops <b>multiple lines of questions to clarify</b> customer needs and <b>position</b> GSK products or services
<b>Distinguished</b>	<b>Develops Opportunity Plans</b> that <b>align the customer's needs</b> with <b>GSK's</b> strategic objectives	<b>Anticipates objections/obstacles and develops strategies</b> to avoid/overcome them	<b>Develops ongoing strategy</b> to obtain account insights from GSK matrix partners that are relevant to the customer	Develops <b>specific questions or call plans</b> for <b>each</b> decision maker/influencer in conjunction with a decision maker to <b>uncover/confirm priority</b> of customer opportunities	Demonstrates understanding of <b>significant trends</b> and their <b>impact</b> on assigned geography and accounts	Develops questions to help customers identify <b>the implications of their needs and consequences of not changing</b>
<b>Proficient</b>	<b>Demonstrates understanding</b> of the customer's strengths, weaknesses, threats, and opportunities for the customer and for GSK ( <b>account plan SWOT</b> )	Develops a customer-centric call plan <b>aligned to a specific Opportunity Plan</b> outlined in the SAP with <b>objectives and questions for each decision maker/influencer in conjunction with a decision maker</b>	Creates a plan to build relationships with <b>key decision makers/influencers in conjunction with decision makers</b> across account	Demonstrates knowledge of <b>how customer's strategies affect patient care delivery</b>	<b>Utilizes</b> approved external database/resources to <b>gain customer insight</b>	Develops multiple questions (for customers) <b>to uncover implied needs</b>




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# CUSTOMER ENGAGEMENT IMPLEMENT

	Executes Customer Plan		Patient-Centric Dialogue		Customer Discovery/Insightful Questioning	
			  		   	
<b>Exceptional</b>	<b>Advances</b> an Opportunity Plan by using <b>customer stated prioritized goals</b>	<b>Gains</b> customer <b>advance</b> that aligns to the call plan <b>or adapts the discussion</b> to information gained during the call	Engages customers with account <b>insights</b> obtained from <b>other</b> strategic <b>contacts within the account</b>	<b>Implements effective dialogue</b> for decision makers/influencers in conjunction with decision makers to <b>uncover or confirm the decision cycle or criteria</b>	Implements a self-development plan by <b>proactively searching out GSK opportunities to grow</b> and diversify knowledge of customer segments and the healthcare environment	Asks appropriate insightful questions to <b>develop customer's explicit need</b> and <b>position GSK</b> products or services
<b>Distinguished</b>	<b>Executes Opportunity Plans</b> that align the customer's needs with GSK's strategic objectives	Clarifies to <b>understand objections before responding</b> to customer concerns	Engages customers with account <b>insights</b> obtained from <b>multiple</b> GSK matrix <b>partners</b>	<b>Implements effective dialogue</b> for each decision maker/influencer in conjunction with a decision maker to <b>uncover or confirm the priority</b> of the opportunities	Acts as a <b>resource to matrix partners</b> in Customer Account Meetings to <b>facilitate</b> their <b>understanding</b> of customers' and the healthcare environment	Asks <b>implication</b> questions to raise <b>awareness</b> and build the case for <b>change</b>
<b>Proficient</b>	<b>Uncovers customer's needs</b> that <b>align with GSK's strategic objectives</b> to create Opportunity Plans	<b>Executes a customer-centric call plan aligned</b> to a specific <b>Opportunity Plan</b>	<b>Engages with multiple decision makers/influencers in conjunction with decision makers</b> across the account	Engages customers in dialogue that <b>links an appropriate patient type to customer's strategies</b>	Engages matrix partners to <b>gain more knowledge on customers and the healthcare environment</b>	Asks problem questions to <b>uncover implied needs</b>




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# SCIENTIFIC KNOWLEDGE PREPARE

	Brand Strategy 	Disease State 	Marketplace 
<b>Exceptional</b>	Demonstrates <b>understanding</b> of customer and marketplace <b>needs</b> from the <b>perspective of customers</b> within the account and anticipates account hurdles <b>that may prevent planned advances</b>	Develops an <b>Opportunity Plan with matrix partners</b> to address the customer's <b>explicit</b> clinical or technical <b>need</b> (eg, delivery, shipping, product dating, storage, etc.)	<b>Develops a strategic scientific/technical plan</b> (eg, delivery, shipping, product dating, storage, etc.) <b>based on an understanding</b> of the competitive landscape within account
<b>Distinguished</b>	<b>Demonstrates understanding</b> of the customer's clinical/technical <b>priorities</b> (eg, delivery, shipping, product dating, storage, etc.) and <b>GSK</b> product/service <b>strategies</b>	Knows how to tailor and <b>position</b> GSK products/ services in the context of the customer's <b>explicit needs</b>	Demonstrates an <b>understanding</b> of <b>marketplace changes</b> and their potential <b>implications</b> on customer's <b>clinical/technical</b> needs (eg, delivery, shipping, product dating, storage, etc.)
<b>Proficient</b>	<b>Demonstrates understanding</b> of <b>GSK</b> product/service <b>strategies</b> through dialogue with FLL or internal strategy meetings	Completes and maintains <b>all required</b> disease state training and certifications available, including any applicable Section 114 data	Develops a <b>communication</b> strategy and/or <b>call plan</b> within Strategic Account Plan for <b>anticipated</b> customer product/service <b>inquiries</b>

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# SCIENTIFIC KNOWLEDGE IMPLEMENT

	Brand Strategy 	Disease State 	GSK-Approved Resources 
Exceptional	<b>Collaborates</b> with internal GSK teams on <b>continuous improvement in product/service positioning or delivery</b>	Successfully incorporates <b>matrix partners</b> to secure an <b>advance</b> that aligns with a clinical or technical (eg, delivery, shipping, product dating, storage, etc.) Opportunity Plan	Leads <b>implementation of successful strategy in account SAP through execution of a scientific/technical knowledge opportunity</b> (eg, delivery, shipping, product dating, storage, etc.) based on an understanding of competitive landscape within account
Distinguished	<b>Prioritizes</b> product/service discussions based on <b>customer's needs and GSK product/service strategies</b>	Appropriately positions GSK product/service information to <b>address customer's explicit</b> clinical or technical marketplace (eg, delivery, shipping, product dating, storage, etc.) <b>need aligned to a preplanned advance</b>	<b>Quarterbacks</b> resource utilization, <b>through matrix partner collaboration</b> , to meet customer's explicit clinical or technical marketplace needs (eg, delivery, shipping, product dating, storage, etc.)
Proficient	Engages in customer-focused product/service <b>dialogue based on opportunities and/or brand strategy</b>	Engages in <b>discussions</b> with customers about <b>products or the technical marketplace</b> (eg, delivery, shipping, product dating, storage, etc.)	<b>Utilizes approved resources</b> to effectively <b>discuss clinical or technical marketplace issues</b> (eg, delivery, shipping, product dating, storage, etc.) with customers

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# SALES PROFESSIONAL/ACCOUNT MANAGER

## RED ZONE BEHAVIORS

GRADE 6






These behaviors can be exhibited in any of the competency areas and are not all-inclusive.

TRANSPARENCY	RESPECT	INTEGRITY	PATIENT FOCUS
Not providing the complete Prescribing Information for each product discussed on every sales call	Harassment, retaliation or discrimination: Any potential concerns or observations must be reported to the Speak Up Integrity Line	Soliciting an off-label question: Where off-label questions are initiated by the customer, the SOP for answering them should be followed	Sales data should be used consistent with the individual Territory Sales Data Use policy
Having knowledge of or observing a CPP or other policy violation and not reporting. All violations must be reported to the Speak Up Integrity Line	1) Providing any business service to the customer (eg, processing paperwork for a customer) 2) Linking our efforts to improving the customer's business	Use of materials not approved by GSK or misuse of approved materials. Use of homemade "bread". All materials should be used according to GSK instructions	Selling a product without training certification
Not providing fair balance: Each product sales call should contain a balance of efficacy and safety information	Marketing the spread	Falsification of records or other company documents	Quid pro quo arrangements
	Encouraging or directing others to engage in Red Zone Behaviors	Not using "Write Right" principles when creating call notes, emails, or other documents and communications	Not providing fair balance: Each product sales call should contain a balance of efficacy and safety information.
		Linking use of our products/services to compensation opportunities for customers	Off-label sales and promotion: Only approved products and their indications should be discussed.
		Off-label sales and promotion: Only approved products and their indications should be discussed	Not providing the complete prescribing information for each product discussed on every sales call
		Misuse of samples, coupons and vouchers; Samples, coupons and vouchers should be used in the manner instructed by GSK (e.g., should not be sold or bartered, and should not be left with excluded specialties)	Not providing accurate product information during discussions with customers
		Inappropriately comparing competitor products.	Failure to report an adverse event
		Selling a product without training certification	
		Failure to submit appropriate documentation and receipts for expenses	
		Failure to adhere to the Patient First integrity expectations	
		Failure to safeguard company information, technology resources, and personally identifiable information	




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# BUSINESS ACUMEN **PREPARE**

	<b>Business Planning</b> 		<b>Account Management</b> 		<b>Positioning GSK-Approved Resources</b> 	
<b>Exceptional</b>	<b>Synthesizes information from multiple sources to advise matrix partners</b> on geographic/account contingency planning	<b>Analyzes impact of marketplace changes</b> on pull-through/access strategies and <b>potential outcome of alternative scenarios</b>	<b>Develops a plan to move from an implied need to explicit need</b>	<b>Anticipates changes in access and develops a plan to achieve favorable access</b> (eg, improve supply management, and formulary position, reduce access barriers, and/or decrease RAR)	Plans discussions with <b>matrix partners</b> to understand and <b>develop a strategy to address GSK product/service vulnerabilities and gaps</b>	Plans implementation of how GSK-approved resources <b>meet mutual business objectives of matrix partners</b> aligned to high-potential opportunities
<b>Distinguished</b>	<b>Analyzes local market/customer dynamics and plans appropriate strategies</b> to address customer opportunities	<b>Analyzes outcomes and prepares communication of jointly identified pull-through/access opportunities</b>	Creates a plan to <b>uncover the compelling event for the customer to take action</b>	Develops a plan to <b>engage with internal and/or external matrix partners</b> to gain additional insight/options to <b>optimize product access</b>	Analyzes <b>vulnerabilities and gaps to identify potential solutions</b> to customer needs	Plans allocation of GSK-approved resources to <b>multiple levels of the account in the call plan</b>
<b>Proficient</b>	<b>Shares account/market insights with leadership, matrix partners and/or HQ Teams</b> that could be used for <b>strategy</b> development	Works with <b>matrix partners to prepare a plan</b> for pull-through on jointly identified pull-through/ <b>access opportunities</b>	Creates both a planned <b>primary and secondary</b> advance	<b>Develops a plan to share summarized customer business insights with internal colleagues</b> (eg, Marketing, CMO, contract holders, trade, value stream mapping)	<b>Prepares a strategy</b> to use <b>approved resources</b> to meet the <b>unique goals/needs of customers</b>	<b>Prioritizes allocation of GSK-approved resources, including time</b> , based on potential business impact








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# BUSINESS ACUMEN IMPLEMENT

	Executes Business Plan		Account Management		Positioning GSK-Approved Resources
					
<b>Exceptional</b>	<b>Provides leadership and HQ teams customer insight to support development of customer strategies and resources</b>	<b>Adapts</b> to marketplace changes by meeting with matrix partners to review and adjust pull-through/ <b>access</b> strategies and <b>ensure alignment</b>	Executes a plan that aligns the <b>customer's explicit need to the GSK strategic objectives</b>	Implements a <b>strategy</b> that <b>enhances positive product access</b> (eg, improve supply management and formulary position, reduce access barriers, and/or decrease RAR)	Collaborates with matrix partners to <b>implement solutions</b> that address GSK product/service <b>vulnerabilities and gaps</b>
<b>Distinguished</b>	<b>Leads</b> colleagues in national/regional account <b>strategy implementation</b>	<b>Communicates outcomes of agreed-upon pull-through/access activities/programs across matrix teams to maintain momentum</b>	Communicates effectively with the customer <b>based on the understanding of the customer's compelling event</b>	<b>Engages</b> with internal and/or external matrix partners to <b>optimize product access</b>	Engages customer to <b>understand his/her perception</b> of GSK product/service <b>vulnerabilities and gaps</b>
<b>Proficient</b>	Engages leadership, matrix partners and/or HQ teams that help <b>develop a business case</b> for an alternative approach to a customer's need	Collaborates with matrix partners to <b>implement</b> appropriate pull-through/ <b>access</b> activities <b>with specific objectives</b>	<b>Gains a primary advance or secondary advance</b>	Shares Customer Business Insights with matrix partners <b>to improve processes and/or outcomes</b> (eg, Marketing, CMO, contract holders, trade, value stream mapping)	<b>Implements strategy by utilizing approved resources</b> aligned to the customer's explicit need









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# CUSTOMER ENGAGEMENT **PREPARE**

	<b>Customer Planning</b> 		<b>Patient-Centric Dialogue</b>   		<b>Customer Discovery/Insightful Questioning</b>   	
<b>Exceptional</b>	Develops a plan based on analysis of <b>anticipated market shifts</b> and the impact that they will have on <b>GSK's current and future business based upon scenario planning</b>	<b>Plans a series of interactions/calls with specific objectives to maintain momentum</b> on advances towards successful Opportunity Plan outcomes as documented within the SAP	Develops a plan to use customer <b>or patient</b> insights to <b>impact GSK customer strategy at the BU or segment level</b>	Develops <b>high-potential Opportunity Plan</b> with specific steps that can be <b>successfully implemented in other accounts</b>	Develops <b>strategic plan to address GSK's knowledge gap</b> around customers or the marketplace	Demonstrates understanding of MCE concepts and <b>identifies opportunities to coach colleagues</b>
<b>Distinguished</b>	Develops a plan to engage <b>multiple</b> customer decision makers/ influencers in conjunction with decision makers <b>to build a foundation of support</b> across the account	<b>Develops strategic links between</b> specific advances on an aligned <b>customer's explicit need and GSK's strategic objectives</b>	Uses <b>gathered information</b> and <b>account</b> insights to analyze the <b>impact on matrix partners' customers</b>	<b>Analyzes customer decision criteria</b> and understands <b>matrix partners' objectives</b> to align customer approach on call/Opportunity Plan	<b>Demonstrates/shares</b> with matrix partners or FLL understanding of marketplace <b>participants that influence our business</b> (eg, employer groups, local/state governments, trade associations)	Develops plan that includes research and <b>dialogue</b> with <b>multiple</b> customers and GSK matrix partners to <b>uncover the customer's motivations</b> and potential icebergs
<b>Proficient</b>	Develops a plan to utilize <b>customer stated prioritized goals to advance an Opportunity Plan</b>	<b>Develops relevant advances and alternative advances</b> aligned to the Opportunity Plan	<b>Develops ongoing strategy to obtain account insights from multiple contacts within account</b> that lead to a broader understanding of the customer	Develops <b>specific questions or call plans to uncover/confirm</b> the <b>decision cycle or criteria</b> for individual decision makers/influencers in conjunction with decision makers	Understands how <b>evolving external events may impact the market, customers, and GSK</b>	Develops <b>multiple lines of questions to clarify</b> customer needs and <b>position</b> GSK products or services




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# CUSTOMER ENGAGEMENT IMPLEMENT

	Executes Customer Plan 		Patient-Centric Dialogue   		Customer Discovery/Insightful Questioning    	
<b>Exceptional</b>	Executes an Opportunity Plan with customer that <b>anticipates longer-term</b> market dynamics	Engages in a <b>series of interactions/calls</b> with customers that leads to advances that <b>result</b> in a <b>successful</b> Opportunity Plan <b>outcome</b>	<b>Influences GSK's customer strategies</b> by sharing customer or <b>patient</b> insights within GSK (segment or BU)	Implements <b>high-potential opportunity</b> and then works with colleagues to <b>successfully implement the plan in other accounts</b>	<b>Leads customer discovery project</b> for segment/team (eg, customer input on contracting approaches or launch product, B2B affiliations, impact of an aspect of HCR)	<b>Develops teams'/matrix partners'</b> MCE skills through situation-specific dialog and coaching
<b>Distinguished</b>	Engages <b>multiple</b> customers (focus of power, focus of receptivity, focus of dissatisfaction, etc) <b>to advance</b> Opportunity Plans	<b>Links</b> specific <b>advances</b> to the <b>customer's</b> needs and <b>GSK's</b> strategic objectives	Shares <b>gathered account information and insights</b> with matrix partners that have <b>an impact on the partner's customer</b> interactions	Engages <b>matrix partners</b> in call/ opportunity <b>planning</b> and <b>communicates outcomes</b> of the call to them	<b>Contributes to GSK strategy by uncovering new resources</b> that could be used to learn more about customers and the healthcare environment	<b>Uncovers</b> customer <b>motivations</b> by exploring account roadblocks, icebergs, and personal agendas
<b>Proficient</b>	<b>Advances</b> an Opportunity Plan by using <b>customer stated prioritized goals</b>	<b>Gains</b> customer <b>advance</b> that aligns to the call plan <b>or adapts the discussion</b> to information gained during the call	Engages customers with account <b>insights</b> obtained from <b>other</b> strategic <b>contacts within the account</b>	<b>Implements effective dialogue</b> for decision makers/influencers in conjunction with decision makers to uncover or confirm the <b>decision cycle or criteria</b>	Implements a self-development plan by <b>proactively searching out GSK opportunities to grow</b> and diversify knowledge of customer segments and the healthcare environment	Asks appropriate insightful questions to <b>develop customer's explicit need and position GSK</b> products or services




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# SCIENTIFIC KNOWLEDGE PREPARE

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<b>Distinguished</b>	<b>Demonstrates understanding</b> of the customer's clinical/technical <b>priorities</b> (eg, delivery, shipping, product dating, storage, etc.) and <b>GSK</b> product/service <b>strategies</b>	Knows how to tailor and <b>position</b> GSK products/services in the context of the customer's <b>explicit needs</b>	Demonstrates an <b>understanding</b> of marketplace <b>changes</b> and their potential <b>implications</b> on customer's <b>clinical/technical</b> needs (eg, delivery, shipping, product dating, storage, etc.)
<b>Proficient</b>	<b>Demonstrates understanding</b> of <b>GSK</b> product/service <b>strategies</b> through dialogue with FLL or internal strategy meetings	Completes and maintains <b>all required</b> disease state training and certifications available, including any applicable Section 114 data	Develops a <b>communication</b> strategy and/or <b>call plan</b> within Strategic Account Plan for <b>anticipated</b> customer product/service <b>inquiries</b>

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Distinguished	<b>Prioritizes</b> product/service discussions based on <b>customer's needs and GSK product/service strategies</b>	Appropriately positions GSK product/service information to <b>address customer's explicit</b> clinical or technical marketplace (eg, delivery, shipping, product dating, storage, etc.) <b>need aligned to a preplanned advance</b>	<b>Quarterbacks</b> resource utilization, <b>through matrix partner collaboration</b> , to meet customer's explicit clinical or technical marketplace needs (eg, delivery, shipping, product dating, storage, etc.)
Proficient	Engages in customer-focused product/service <b>dialogue based on opportunities and/or brand strategy</b>	Engages in <b>discussions</b> with customers about <b>products or the technical marketplace</b> (eg, delivery, shipping, product dating, storage, etc.)	<b>Utilizes approved resources</b> to effectively <b>discuss clinical or technical marketplace issues</b> (eg, delivery, shipping, product dating, storage, etc.) with customers

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# SALES PROFESSIONAL/ACCOUNT MANAGER

## RED ZONE BEHAVIORS



These behaviors can be exhibited in any of the competency areas and are not all-inclusive.

TRANSPARENCY	RESPECT	INTEGRITY	PATIENT FOCUS
Not providing the complete Prescribing Information for each product discussed on every sales call	Harassment, retaliation or discrimination: Any potential concerns or observations must be reported to the Speak Up Integrity Line	Soliciting an off-label question: Where off-label questions are initiated by the customer, the SOP for answering them should be followed	Sales data should be used consistent with the individual Territory Sales Data Use policy
Having knowledge of or observing a CPP or other policy violation and not reporting. All violations must be reported to the Speak Up Integrity Line	1) Providing any business service to the customer (eg, processing paperwork for a customer) 2) Linking our efforts to improving the customer's business	Use of materials not approved by GSK or misuse of approved materials. Use of homemade "bread". All materials should be used according to GSK instructions	Selling a product without training certification
Not providing fair balance: Each product sales call should contain a balance of efficacy and safety information	Marketing the spread	Falsification of records or other company documents	Quid pro quo arrangements
	Encouraging or directing others to engage in Red Zone Behaviors	Not using "Write Right" principles when creating call notes, emails, or other documents and communications	Not providing fair balance: Each product sales call should contain a balance of efficacy and safety information.
		Linking use of our products/services to compensation opportunities for customers	Off-label sales and promotion: Only approved products and their indications should be discussed.
		Off-label sales and promotion: Only approved products and their indications should be discussed	Not providing the complete prescribing information for each product discussed on every sales call
		Misuse of samples, coupons and vouchers; Samples, coupons and vouchers should be used in the manner instructed by GSK (e.g., should not be sold or bartered, and should not be left with excluded specialties)	Not providing accurate product information during discussions with customers
		Inappropriately comparing competitor products.	Failure to report an adverse event
		Selling a product without training certification	
		Failure to submit appropriate documentation and receipts for expenses	
		Failure to adhere to the Patient First integrity expectations	
		Failure to safeguard company information, technology resources, and personally identifiable information	

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# Glossary Sales Professional/Account Manager COTs 2015

**3 P's:** People, Permission, Purpose (MCE Principle)

**70/20/10:** Development is not just formal training and education programs. What drives development are on-the-job experiences, blended with interactions and relationships with people, supported by formal instruction or access to learning resources, all underpinned by support from your manager. This is now frequently called the 70/20/10 development principle, and it is important to consider each element when creating a development plan.

- 70% on-the-job development
- 20% development relationships
- 10% formal development

**Account type:** Action group, specialty, payer type, unique attribute that makes them a group of customer segments.

**Administrative approach:** Decision made above the provider level, at the C-Suite or Administrative level; also known as a top-down approach.

**Advance the call:** Customer agrees to future action that may progress toward a decision to use GSK's products or resources.

**Aligned portfolio:** The products and/or resources you are currently responsible for selling or providing.

**Appraisal:** This is the summation of all consistent behaviors that were demonstrated at the end of the semester. The summary is submitted to the organization for incentive compensation and for performance evaluation purposes.

**APT:** Appraisal Process Tool: The roll up document that becomes the appraisal once it is validated by the FLL.

**ASMAST objective:** Aligned, specific, measurable, actionable, realistic and timely.

**Behavioral indicator:** Key examples of job-related activities that can be observed and evaluated to accurately measure job performance.

**BI tools:** Business Improvement tools, accountability boards, KPIs, lead/lag measures, etc.

**Business Improvement:** The disciplined application of simple approaches drawn from Organization Development, Lean Six Sigma, and Project Management to transform our ways of working, in order to continuously improve business performance and customer value. This will help our Teams improve efficiency and effectiveness and lead to increased engagement.

**Business plan:** A strategic plan with measurable goals and objectives, strategies, tactics, timelines for results, with responsibilities of GSK personnel outlined. The plan should be aligned to national and regional strategy with identified gaps and opportunities specific to one's territory.

**C-Suite:** Individuals that could include CEO, CFO, and other key department leaders that impact pull-through of a GSK solution.

**Call continuum:** Connecting the current customer call/plan to the previous engagement.

**Call plan:** Plan for individual customer interaction.

**Call point:** Customer interaction with a person or group and a GSK Sales Professional/Account Manager.

**Certified supplemental observer:** A certified rater that can fill out an FCR and COT that counts toward incentive compensation (FBM, CDL, SLL, etc). See guidance in Supplemental Observer Guidance document located on the Patient First web site.

**Clear opportunity:** Is when there is an opportunity to demonstrate a behavioral indicator and leaves no doubts or “maybe” during the 4-step process.

**Clinical need:** These are needs or concerns directly related to patients and the clinical choices that each customer makes, including choices amongst the various options that could be included in the treatment protocol.

**Collaborates with matrix partners:** To work jointly with others to seek and share information in order to better understand and be of value to customers---eg, bringing in an MSL to address a customer's unsolicited question that cannot be answered by a Sales Professional.

**Communication plan:** A specific plan outlining accountability among matrix partners including when, how often, by which mechanism (e-mail, voice mail, teleconference, meetings, etc) important information will be disseminated.

**Competency:** Are those behaviors that encompass skills, knowledge, and abilities and help create a picture of what success “looks like.”

**Continuous learning:** Continuous learning refers to the ability to continually develop and improve one's skills and knowledge in order to perform effectively and adapt to changes in the workplace.

**COT:** Coaching Observation Tool: This is the tool within the FCR that houses the behavioral indicators.

**Customer:** Provider, account (global word for customer, HCP, pharmacist, C-Suite, etc.).

**Customer discovery:** Gaining relevant information/insights previously unknown/unanticipated.

**Customer insights:** Understanding of the customer's mind-set, motivations, priorities, and influences based on customer/account discussion in order to advance the call and identify appropriate resources that are aligned to the patient-focused opportunity.

**Decision criteria:** Specific considerations required by a customer in order to move forward with next action.

**Decision Cycle:** Term referenced from Mastering Customer Engagement. Describes the steps a customer goes through when making a buying decision: changes over time, recognition of needs, evaluation of options, resolution of concerns, and implementation.

**Explicit needs:** The customer has stated a clear problem and a desire for a solution.

**FCR (Field Coaching Report):** This is an official evaluation tool that a leader uses to document observed behaviors that counts toward incentive compensation. The FCR contains the COT and is directly linked to incentive compensation.

**Financial needs:** Individual or group practices are small businesses that are “for profit” There are costs to run the business, including facilities, staffing, supplies, services, insurance, etc. There are also constraints imposed by today's healthcare system. Like any business, it is important that the income/revenue be greater than the cost of operating the business.

**GSK-approved resource:** Any person or approved piece used in an appropriate setting to add value to customer interaction or in answering customers' needs—eg, dosing card, sales aid, clinical nurse educator, GSK matrix partner, PI (prescribing information), collaboration with Hospital Account Manager, etc.

**GSK Expectations:** Include both Individual and Leadership Expectations; they are clear statements of how all GSK employees must perform their jobs and deliver their objectives in order to drive GSK's success.

**Identified customer need:** A customer need uncovered through insightful questioning with the customer, clearly expressed and confirmed by the customer directly.

**Implication questions:** Questions designed to help the customer understand the impact of their challenge or problems.

**Influencers:** An individual who has the capacity to produce action, behavior, or opinion with decision makers. Examples of health care professionals with the ability to influence include but are not limited to medical directors, clinical directors, clinical pharmacist, members of immunization committees, nurses, office managers, patient care coordinators, nurse managers.

**Insightful questions:** Questions that are MCE based that seek alignment to an approved GSK-solution/resource.

**Key customer:** A customer important from a business perspective due to influence, volume, or potential and/or has been identified by the company as a key customer.

**Levels:** Departments within an account.

**Matrix Account Plan (MAP):** Planning tool used by Account Managers to collaborate with sales matrix partners.

**Matrix partners:** Any GSK employee who has alignment, interest, or approved resources for a shared or potentially shared customer or account alignment.

**MCE:** Mastering Customer Engagement.

**MCE principles:** Within the concept of handling challenges: MILD or EARS.

**Multiple:** Two or more

**Need-payoff questions:** Questions designed to demonstrate or illustrate how a solution may benefit the customer appropriately with a focus on how a solution can benefit the way in which a customer provides the best care for a patient.

**Open-ended questions:** Questions answered by more than “Yes/No”: Situation, Problem, Implication, and Need-Payoff.

**Organizational needs:** Issues in this category are linked to the successful functioning of the organization. Effective business planning, employee satisfaction, office efficiency, optimal patient load, disease state management, and on-time and accurate completion of paperwork are some examples.

**Outside influences:** Marketplace factors, financial or political factors, practice demographics, corporate policies, or changes outside the individual HCP’s or account’s scope of influence that impact decision making of the customer.

**Patient-centric solution:** A solution with primary benefit for a patient or patients.

**Performances manage:** GlaxoSmithKline will address deficiencies in an employee’s performance with the goal of enabling the employee to consistently meet Company expectations. Employee conduct is addressed under the Employee Conduct Policy.

- A. Performance management is a management responsibility with support from the Employee Relations Center.
- B. Management typically will begin a progressive course of performance management with specific recommendations for improvement, after consultation with the GS K Employee Relations Center (1-877-694-7 547, option #2, then #4). The normal steps of performance management include:
  - 1. Performance Counseling
  - 2. First Warning
  - 3. Final Warning
  - 4. Termination

**Priority account:** An identified account with significant contribution/level of importance to the District/Region/Area.

**Proactively:** Taking the initiative by acting rather than reacting to events without being told.

**“Shares with FLL”:** Verbally, written, and/or from discussions utilizing data. This can include notes, call plan, call notes, voice messages, customer and patient insights, etc.

**Situation questions:** These are questions designed to better understand customers' current situations. These questions are valuable to the person asking, not necessarily to the person being asked.

**SK:** Scientific Knowledge

**SME:** Subject Matter Expert

**Stakeholders:** GSK employees and others outside of GSK who have an interest in or are impacted by Sales Professionals/Account Manager actions. Stakeholders will likely overlap with matrix partners but would be more expansive. For example, regulators, share holders, and the communities in which our customers live and work could all be stakeholders.

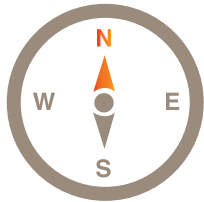
**Strategic:** An approach that captures an underlying rationale aligned to a crucial objective. The strategy is the vision; the tactics describe how you will accomplish the strategy.

**Technical marketplace:** Refers to the details of product supply in the marketplace (eg, delivery, shipping, product dating, product shortages, product packaging, product tracking).

**Theme:** Areas of focus in the COT that can help narrow skill sets and coaching.

# Individual Expectations

For individual contributors



## Set direction & inspire

Ensuring your work supports your team's goals and the organisational priorities and applying sound judgement in all that you do

### If it's happening:

you ensure your work contributes to the goals of the business and use your judgement to influence decisions about where to spend time and resources. You are inspired by GSK's vision and purpose.

### If it's not happening:

you put minimal effort into thinking how to enable GSK to achieve our vision and business goals. You focus on less-important priorities, rely on other people to make decisions and ignore new thinking.



## Work across boundaries

Building trusting relationships within and beyond your team to achieve goals and contribute to the success of GSK

### If it's happening:

you find the best solutions for the business by working with people both inside and outside the organisation. You work collaboratively with others and develop effective relationships to minimise silo-working.

### If it's not happening:

you are suspicious of others' intentions and work with a 'them-and-us' attitude. You work in an isolated way, trying to achieve your objectives without using relationships to get things done.



## Release energy

Engaging constructively with others and demonstrating a positive mindset

### If it's happening:

you contribute to a great working environment by bringing energy and commitment. You embrace difference in others, maintain your motivation and encourage others to do the same.

### If it's not happening:

you demonstrate low energy levels or inconsistent behaviour. You and your colleagues have an over-reliance on leaders for motivation.



## Develop capability & talent

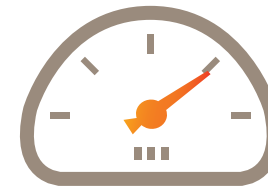
Equipping yourself with the skills and knowledge to do great work, now and in the future, and supporting others to do the same

### If it's happening:

you are open to learning, adapting and identifying opportunities for development. You are improving your performance by asking for feedback and you are supporting the development and performance of others by giving feedback.

### If it's not happening:

you are not keeping your skills up to date or acting on feedback. You undervalue learning on the job and see formal programmes as the main method of learning. You make cynical comments about new policies and practices and do nothing to support them.



## Drive performance

Holding yourself and others accountable for delivering quality results

### If it's happening:

you set, and regularly update, clear SMART objectives and work with your manager to keep your performance on track. You deliver quality work, on time and to budget by planning ahead and focussing your effort. You continually improve and simplify what you do.

### If it's not happening:

you are slow to respond to issues arising from changing circumstances and are not focused on your key deliverables. You do not propose solutions to problems.



## Live our values

Acting as a role model, ensuring everything you do is in line with our values, serving patients and consumers

### If it's happening:

you achieve your goals by applying GSK's values. You share stories of ethical behaviour as examples of our values in practice.

### If it's not happening:

you avoid speaking up and challenging when something does not look or feel right. You look for ways to work around our values which puts patients, consumers and GSK's reputation at risk.

The GSK Leadership Expectations apply to all staff who are grade six and above, as well as any staff below grade six who are line managers or matrix managers.

# Leadership Expectations

For grade six and above, line managers and matrix managers



## Set direction & inspire

Using sound judgement to set a clear and compelling vision that shows your people how their work contributes to delivering our strategy and mission

**If it's happening:** everyone is clear on their role and contribution. People are making well-informed judgements and decisions that move the organisation forward. Debates are thought provoking and inspire innovation.

**If it's not happening:** your team is unclear about how their work contributes to the business strategy, leading to resources being wasted or deployed to low-value activities. Decisions are over analysed and revisited.



## Work across boundaries

Cultivating a network of collaborative relationships, based on mutual trust, to ensure the best outcome for GSK as a whole

**If it's happening:** people and teams work together to achieve shared goals with everyone contributing appropriately. Interactions are open and honest, and conflicts are positively resolved.

**If it's not happening:** there is a lack of trust and understanding between people which means issues are not raised in the team and decisions have to be made at a more senior level. This causes delays and re-work. Silo-working is taking place.



## Release energy

Creating a healthy, engaged and inclusive working environment that is sustainable over time

**If it's happening:** you have a motivated team who feel they are valued, stretched and have the space to deliver. People quickly recover from setbacks.

**If it's not happening:** people feel underutilised, become reluctant to take risks, seek to protect their own positions and rely on you to take all the decisions. There is a high incidence of absenteeism and burnout.

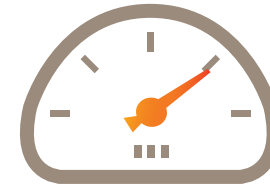


## Develop capability & talent

Investing in your people and building the organisational capabilities necessary to implement our strategy, now and in the future

**If it's happening:** you know your people well and have a strong, diverse talent pipeline with successors identified for key roles. Everyone has a development plan and receives regular feedback. Sustainable growth is supported by proactive organisational capability building.

**If it's not happening:** learning and development is neglected, resulting in high turnover and poor commitment. Talents and aspirations are not explored, skills are underused, motivations are not understood, and the company struggles to build organisational capability.



## Drive performance

Holding yourself, your team and others accountable for delivering quality results

**If it's happening:** your team has a "can do" attitude where critical activities are prioritised and barriers removed. Projects are delivered on target, on time and to budget. ASmart objectives are set and monitored and higher performers are recognised.

**If it's not happening:** change is poorly led with loose financial controls. Results fall short of expectations, your team is slow to execute and complex systems present a barrier to achievement. Underperformance



## Live our values

Acting as a role model, ensuring everything you do is in line with our values, serving patients and consumers

**If it's happening:** people understand what the values mean in their work. You have an environment where people can 'speak up' and challenge decisions or behaviours. You share stories of ethical behaviour as examples of our values in practice.

**If it's not happening:** wrongdoing is tolerated and results are delivered at the expense of the GSK values. People feel unable to 'speak up' which leaves issues unresolved, ultimately leading to surprises arising from hidden and unethical behaviour.



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