



**Earning trust
and winning
business.**

**Best practices
for getting on
the same page
with your client.**



What else can I learn about this client?

This is the single most important question when developing an opportunity. Why? For the same reason Patheon offers such a wide range of expertise, capabilities, technologies, sites and services – giving clients exactly what they need is how we win.

The more you know about the client's project and buying process, and the earlier you know it, the better. Then every interaction is an opportunity to demonstrate that Patheon has the genuine expertise, broad capabilities and collaborative approach to precisely meet their needs like nobody else.

In your hands right now are the very best practices, to-do lists and advice from your Patheon peers and leadership. Seasoned pros who have earned the trust and business of many clients.

The ultimate connection with your client occurs through deep insight of their needs including opportunities and issues that they don't yet see. In these situations use Challenger Messaging to inform, drive need and guide clients to our unique solutions. This workbook is organized to bring living detail to the sales funnel so you can maximize the return on your Sales Force investment. Inside you'll find everything you need to:

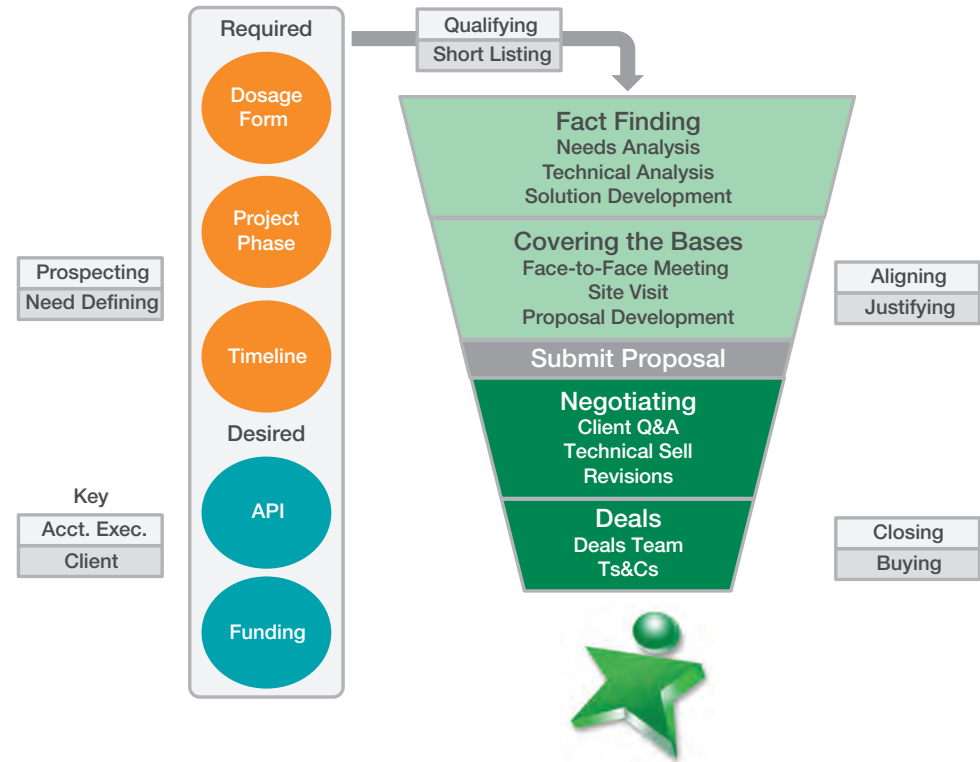
- Efficiently determine if your client's project is a mutual good fit.
- Tailor a value proposition that aligns their needs with Patheon's capabilities.
- Clearly understand your client's selection criteria – both scientific and business.
- Define and prepare for the required actions in your client's evaluation process.

The goal is to sync your selling process with your client's buying process. To work so well as a team to accomplish their objectives, that it only makes sense to continue collaborating on the actual project. It has been proven time and again, getting on the same page with your client at the beginning is the best way to ensure you'll be on the same page at the end.



Leads

Opportunities



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Qualifying – Is this a Valid Opportunity?

Required

- Dosage Form:** Have they identified a targeted dosage form?
- Project Phase:** What phase of development is the project? What is the objective?
- Timeline:** When do they need to start? When do they need the first GMP batch?

Desired

- API:** Have they identified their API? Has the supplier been named?
- Funding:** Is funding confirmed? If not when? Is the source internal or investors?

Important Information

- Fit:** Does this project comfortably fit Patheon's capabilities or is it a stretch?
- Drivers:** Why are they looking? Why outsource? What is their pain point?
- Specific Requests:** Have they asked about specific services and/or capabilities?
- Scope:** Are they willing to share enough information to complete a TAQ?
- Tech Call:** Are they open enough with details to participate in a technical call?
- CRO:** Have they named a CRO? When is the first patient scheduled for treatment?
- Forecasts:** If a commercial project, have they provided an "accurate" forecast?
- Relationship:** How's rapport? Do they share information and return calls quickly?

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Needs Analysis – Client's Selection Criteria

- Integrated Offering:** Ask about big-picture needs. Our integrated offering may be why the client is considering us, or they may not realize its full scope and potential.
- Capabilities:** Which capabilities does the client believe they need?
- Capacity:** Do they have specific projections concerning volume?
- Access to Experts:** Is it important for the client to have direct access to experts?
- Experience:** Exactly what experience does the client think important for this project?
- References:** How important are references to this client?
- Regulatory Record:** Have past experiences made regulatory track record key?
- Timeline:** Is a pre-defined timeline key to their selection of Patheon?
- CapEx:** Is the client willing or able to share in capital expenditures?
- Price:** Do we have a clear sense of their budget and funding?
- Site Location:** How important is site location to this client?
- Responsiveness:** What are their expectations for service and responsiveness?
- Other:** Are there any additional criteria that will drive decision making?

Needs Analysis – Client's Evaluation Process

- Site Visit:** Required or not, how soon can we get them to the site?
- Quality Audit:** If a requirement, what are their criteria, process and timing?
- Competitive Bid:** If required, what is the process? What are the parameters?
- Technical Review:** If their technical team needs to review the proposal, can we present it to them? Can we get their direct input first with a tech call?
- Executive Presentation:** At what point will the leadership team review?
- Board Approval:** If this is required, when will it happen?
- Funding:** At what point will the budget be finalized?
- Corporate Strategy:** Is approval tied to a larger strategic decision? What and when?
- Outside Factors:** Any influencing factors outside of the project?



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Technical Analysis

- ❑ **CDA:** Make sure you have a CDA in place. It's a powerful sales tool that frees the flow of information.
- ❑ **TAQ:** Walk your client through the TAQ, maybe complete it for them.
- ❑ **RFP:** Review the RFP with your client to gain context and details.
- ❑ **EH&S:** It is important to request an EH&S assessment to prevent delays later.
- ❑ **Budget:** Always ask the client about pricing expectations. Review with quotes team.
- ❑ **Tech Review:** Go over technical details with applied tech/operations. Tech calls are always a deal-building resource.

Solution Development

- ❑ **Value/Price:** Set expectations – We bring the value of speed, choices, experience and reliable quality, but we are rarely the least expensive option.
- ❑ **Pre-Qualify:** Pull together preliminary numbers with the quotes team. It may kill the deal but your client will remember you for respecting their time next project.
- ❑ **Pre-Schedule:** Work with operations to confirm that we have the capacity/availability to meet the client's timing expectations.
- ❑ **Verify:** Is your client being tight with information? Even with a CDA? If your gut is telling you it isn't a valid opportunity, push to find out.
- ❑ **Unknowns:** Be aware of factors outside the scope of the project. Familiarize yourself with the big picture of your client's business and market.
- ❑ **Prioritize:** Use the sales funnel and this workbook to guide what information and tasks to pursue first. This will keep your time focused and productive..



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Face-to-Face Meeting

- Before**
 - ❑ **Invite:** Who should be at the table? Consider expertise and personalities.
 - ❑ **Agenda:** Draft an agenda and seek your client's input. Who would they like to meet? What do they want to learn and accomplish?
 - ❑ **Research:** Learn about the client's overall business and pipeline so you can customize the presentation.
 - ❑ **Blue Sheet:** Prepare a blue sheet to share with other attendees before the meeting.
 - ❑ **Questions:** Know what information you are missing, and have a list of questions prepared in advance.
 - ❑ **Goals:** Set your personal goals/wins for the meeting.
 - ❑ **Confirm:** Send an email a couple days in advance to confirm time and place.
 - ❑ **Travel Smart:** Send an email blast to other nearby clients to coordinate meetings.
- During**
 - ❑ **Basics:** Remember the three Ts – Tell them what you'll tell them, tell them, tell them what you told them.
 - ❑ **Zip-It Part 1:** Balance leadership of meeting between you and the client.
 - ❑ **Zip-It Part 2:** A well-placed "Golden Silence" will encourage sharing more information.
 - ❑ **Intent:** Gauge the client's buying intent by their preparation and participation.
 - ❑ **Next Steps:** Before you adjourn, agree to action items and schedule the next meeting.
 - ❑ **Leave Behind:** Bring a leave behind of product collateral or a relevant whitepaper in printed form or on a thumb drive with the presentation.
 - ❑ **Look:** Casually conduct reconnaissance. More 007 than nosy neighbor.
- After**
 - ❑ **Minutes:** Write up and share the meeting minutes that evening, while the day is still fresh in mind.
 - ❑ **Action Items:** Write the action items email in the same format as SCR, copy and paste to save time.
 - ❑ **Thank You:** Send a "Thank You" note, or your mother will be very disappointed. As will your boss.

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Site Visit

Before

- **Invite:** Most clients who visit a site become customers. Invite yours early and often!
- **Agenda:** Prepare an agenda with your client, then share with the internal team.
- **Green Sheet:** Complete a green sheet and share internally.
- **Pre-Game:** Engage the site to bring them up to speed. The goal is a well-prepared facility and a team that's unified in giving the client a personalized experience.
- **Presentation:** Your presentation should demonstrate that we understand their needs and compliment the tour, which should prove we can meet those needs.
- **Hospitality:** Be a great host – arrange transportation to and from the site, make introductions, organize a dinner for the two teams to get to know each other. Take your client out the night before to discuss any lingering concerns and build rapport.

During

- **One and Only:** On a tour it's easy to slip into generic specs. Instead, shoot for the impression that the facility could have been built just for their project.
- **Alignment:** Show all the ways the site meets their specific criteria and will help them achieve their objectives like no other facility.
- **Two-fer:** If the client has another product we can also do at the site, make sure they see that area and understand the potential added advantages.
- **Proposal Preview:** Have an early draft of the proposal handy to get client input.
- **Next Steps:** List specific actions and book the next meeting before the client leaves.

After

- **Minutes:** Write up and share the meeting minutes while they are fresh in your mind.
- **Post-Game:** Discuss the visit with both your client and the internal team.
- **Proposal Refinement:** Use what was learned during the visit to work with the site team to refine the proposal and scope.

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Proposal Development

Prepare

- **Review:** Clarify the type of proposal that will be most helpful, high-level or detailed?
- **Communicate:** Describe our quoting process and information required. Ask how many proposals they will be reviewing.
- **Tech Specs:** Align technical teams internally and externally to ensure we have all the necessary information.
- **Quote Requirements/Assumptions:** The more complete your input, the better the quotes team can deliver a fast and accurate quote. There are aspects of a project you must provide, but for others a standard assumption will do. At the back of this booklet you'll find a complete listing of these requirements and assumptions organized by project type.
- **Plan:** Set the internal due date two-three days ahead of the submission due date.

Write

- **Ts&Cs:** Split off the terms and conditions section if it makes sense to do so.
- **CapEx:** If capital expenditure is required, discuss the reasons with your client.
- **Updates:** Keep your client informed of progress. Communicate delays ASAP.
- **Proofread:** Before sending, carefully proofread the proposal for typos and mathematical errors, as well as consistency and completeness of information.
- **Send:** Submit the proposal with a cover letter that reinforces the unique value proposition, thanks them for the opportunity and requests a meeting or site visit.
- **Expectations:** The cover letter is also the place to be up front about pricing that is higher than expected, or timelines that have changed.
- **CC:** When appropriate, send the proposal to multiple people so it is not held up if your main contact gets busy.
- **Follow Up:** Call or email the next day to confirm they received the proposal and were able to view it. Arrange a call or meeting to review it together.
- **Follow Up Again:** Follow up after 5 days, then every day after until you receive feedback.

Revise

- **Capture:** Ask the client for a redline detailing their comments and concerns. Capture any questions to review with the quotes team.
- **Coordinate:** Facilitate internal discussions to clarify any potentially confusing comments.
- **Turnaround:** Manage internal revision timeframes, ask the client for missing information and communicate when it is delaying the revised proposal.
- **Contract Mode:** Shift the language from proposal to contract to gain commitment.
- **Proofread:** Double check that the revised proposal is error-free and addresses all of your client's concerns.
- **Send ASAP:** Include a cover letter that details the revisions.

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Client Q&A

- Face to Face:** When possible negotiate in person, otherwise pick up the phone. Email can slow things down significantly.
- Sidebar:** Have offline discussions with key contacts to get their candid feedback on any sticking points and how to keep the discussion moving forward.
- Focus on Requirements:** Include a technical person to address concerns and help keep the discussion centered on meeting requirements rather than a battle of wills over cost.
- Isolate Issues:** Review the selection criteria with the client item by item. Point out responses and solutions for each. The goal is a short list of specific issues.
- Offer Help:** Ask your contact if they are facing any internal hurdles and how you can help overcome them.

Are you conducting technical calls before or after proposal submission? The correct answer is both! Data from Cincinnati PDS proves that insights gained from technical calls are key to getting on the same page with clients and winning their business.

Technical Sell

	Tech Call Before Proposal	Tech Call After Proposal	Site Visit	No Tech Call
Won	29	27	11	4
Lost	25	16	7	18
Pending	15	10	4	20
Win Rate	54%	63%	61%	18%

- Capture:** Ask the client for a redline detailing their concerns and review with the quotes team.
- Coordinate:** Facilitate internal discussions to clarify any confusing comments.
- Turnaround:** Manage internal revision timeframes, request missing information and communicate when it is delaying the revised proposal.
- Contract Mode:** Shift the language from proposal to contract to gain commitment.
- Proofread:** Double check that the revised proposal is error-free and addresses all of your client's concerns.
- Send ASAP:** Include a cover letter that details the revisions.

Proposal Revision

Terms and Conditions

- Start Early:** Save time by involving the legal team early on.
- Matchmaker:** Facilitate internal players working directly with their client-side counterparts – legal with legal, technical with technical.
- Know the Way:** Encourage the client to set an internal path to completion of Ts&Cs. Identify the client coach driving legal discussions from the background.
- Lead the Way:** Facilitate collaboration between the client and internal team: add comments to redlines, communicate rationales and processes, manage timelines.
- Precedents:** Familiarize yourself with the hows and whys of relevant decisions made on previous projects.
- Parameters:** Understand the guardrails and bullet points for each item discussed. Communicate our parameters and rationale. Know where we have room to negotiate.
- RACI:** Responsible, Accountable, Consulted and Informed. Be that person.
- MSA:** Push for MSA to commit your client to a future relationship.

Closing Team

- Why:** Closing teams are for deals that are complex, high-value or in danger.
- When:** Where there is smoke, there is fire. Ask for assistance early on.
- Who:** You are responsible for identifying the right players, matched peer to peer.



Appendix

DPS — Oral Solid Dose Product	Standard Assumptions
API MSDS For API and FP.	Cat2, not controlled.
Annual Product Forecast By SKU or annual volume tiers.	Three tiers of 10, 40 and 80 million, split equally between strengths.
Weight/Fill Weight	Tablet 400 mg Bi-layer Tablet 800 mg Powder-Filled Capsule 400 mg fill weight
Raw Material Costs	No Client Formulation \$12 per kg Client Formulation \$40 per kg for missing materials.
Batch Size With process flow diagram or description and batch records.	600 kg, but may be adjusted based on equipment train.
Manufacturing Process For SUPAC comparison, if applicable.	Tablet High-sheer granulation, dry blend, direct compression, non-functional coating. Capsule High-sheer granulation, dry blend.
Analytical Test Methods IPC, materials, packaging components and finished product.	NA 40 hours, +10 hours per additional API. EU Existing mfg DL hours assumption.
Bulk Density Granulation, blend or tablet.	0.5 g/mL
Special Considerations Temperature, humidity, light or oxygen.	No special considerations.
Packaging Configuration Primary and secondary.	NA Bulk and 100 ct bottles – full volume. EU 2x7 blister packs.
Packaging Specifications Primary and secondary components.	NA 150 cc bottle for 100 ct bottle, no carton. EU PVC blister pack in carton with leaflet.
Intended Market/Country	Required

Appendix

DPS — Sterile Products	Standard Assumptions
Liquid or Lyophilized	Required
Lyophilization Cycle Duration	50 hours.
Terminal Sterilization	No terminal sterilization.
API MSDS For API and FP.	Cat2, not controlled.
Annual Product Forecast By SKU or annual volume.	1 million units.
Batch Size Include process flow diagram or description and batch records.	Liquid Vials 400 L Lyo Vials 400 L Prefilled Syringes 150 L
Holding Time Restrictions	Will support batch size.
Fill Volume Include quantitative formulation, bill of materials, filling limits, and syringe plunger placement tolerances.	Liquid Vials 4 ml Lyo Vials 4 ml Prefilled Syringes 1 ml
Dose Largest single dose and smallest therapeutic dose.	Dedicated equipment not required.
Analytical Test Methods IPC, API ID, materials, packaging components and finished product.	20 hours for micro (sterility, endotoxin, bioburden).
Storage Temperature For API and FP.	Room temperature.
Thawing For bulk API.	Level 1 Not required. Level 2 If required: 24 hours.
Special Product Considerations Temperature, humidity, light, oxygen, density or viscosity.	No special handling required.
Packaging Specifications Primary and secondary, with drawings; include size, type, closure and seal.	Liquid Vials 10 ml Lyo Vials 10 ml Prefilled Syringes 1 ml long glass syringe. Bulk unlabeled vials and syringes.
Intended Market/Country	Required

Appendix

DPS — Softgels	Standard Assumptions
Pharmaceutical, Nutritional or OTC	Pharmaceutical
API MSDS For API and FP.	Cat2, not controlled.
Raw Materials	Assume use of Patheon standard materials.
Annual Product Forecast By SKU or annual volume tiers.	Three tiers of 10, 40 and 80 million, split equally between strengths.
Batch Size Include process flow diagram or description and batch records.	750 kg, standard softgel process on existing equipment.
Manufacturing Process	Gel preparation, fill preparation, encapsulation, drying, inspection polishing, sizing, printing.
Fill Volume Include quantitative formulation and bill of materials.	750 mg
Analytical Test Methods IPC, materials, packaging components and finished product.	40 hours
Special Considerations Temperature, humidity, light or oxygen.	No special considerations.
Packaging	Standard bulk packing with label.
Intended Market/Country	Required

Appendix

PDS – Oral Solid Dose Products	Standard Assumptions
MSDS	Phase I and II Cat3, not controlled. Phase III Cat2, not controlled.
Clinical Phase	Phase I
Development Status New formulation, optimization or transfer.	Limited formulation development, two-batch optimization.
Dosage Form	Required
Release Profile	Immediate release.
Low Solubility	No solubility enhancement needed.
Number of Batches	One each – feasibility, CTM active and CTM placebo.
Batch Size For single strength, including stability testing supply.	Phase I 5 kg Phase II and III 20 kg
Dosage Weight Tablet or capsule.	400 mg
Manufacturing Process	Phase I and II Direct blend, coated. Phase III Wet granulation, coated.
Analytical and Stability Testing	Method development with phase-appropriate validation and ICH stability studies.
Primary Packaging	30-count bottles.

Appendix

PDS – Sterile Products	Standard Assumptions
MSDS	Phase I and II Cat3, not controlled. Phase III Cat2, not controlled.
Clinical Phase	Phase I
Development Status New formulation, optimization or transfer.	Liquid or lyo template formulation development with compatibility studies. Holding time study for lyo only.
Liquid or Lyophilized	Required
Lyophilization Cycle Duration	50 hours.
Terminal Sterilization	No terminal sterilization.
Fill Volume	Liquid Phase I/II: 2 mL, Phase III: 4 mL Lyophilized Phase I/II: 1 mL, Phase III: 4 mL
Batch Size Including stability testing supply.	Phase I 2,000 units Phase II 5,000 units Phase III 10,000 units
Vial and Cap	Phase I and II 6 mL vial Phase III 10 mL vial Cap RTS standard cap or RTS standard lyo cap.
Analytical and Stability Testing	Method development with phase-appropriate validation and ICH stability studies.
Product Storage Temperature	Room temperature.
Thawing For bulk API.	Level 1 Not required. Level 2 If required: 24 hours.

Appendix

PDS – Softgels	Standard Assumptions
MSDS	Phase I and II Cat3, not controlled. Phase III Cat2, not controlled.
Pharmaceutical, Nutritional or OTC	Pharmaceutical
Clinical Phase	Phase I
Development Status New formulation, optimization or transfer.	Limited formulation development, two-batch optimization and proof of concept.
Low Solubility	No solubility enhancement needed.
Batch Size For single strength, including stability testing supply.	Phase I 5,000 units Phase II and III 20,000 units
Fill Volume	750 mg
Dose Description	Size and Format Determined by fill. Shell Appearance Opaque Colorant None Gelatin Type Bovine
Analytical and Stability Testing	Method development with phase-appropriate validation and ICH stability studies.
Primary Packaging	Hand-filled 30-count bottles.

Appendix

Drug Substance – Biologics	Standard Assumptions
Clinical Phase	Required
Product Type	IgG1 mAb
Cell Line	CHO
Starting Material Client provided.	MCB
Program Type	Phase I Process development. Phase II and III Process transfer.
Development Services	Phase I USP, DSP and analytical methods development, but not cell line or formulation development. Phase II and III Required
Analytical Methods	Phase I Platform methods. Phase II and III Client methods.
Titer and Bioreactor Scale	Phase I No requirement or assumption. Phase II and III Required
GMP Run Count Amount of material needed.	Phase I 1 GMP run at 500 L scale. Phase II and III Required
Toxicology and Pilot Batches	Phase I Tox Batch: 50 L scale – not assumed. Phase II and III Required

Drug Substance – API	Standard Assumptions
MSDS and Potency Classification	Required
Purpose Specify either clinical trial, registration or validation.	Required
Clinical Phase and Regulatory Status	Required
Specifications and Chemical Structure	Required
Intermediate or Advanced Intermediate To be provided by client.	Required
Quantity	Required
Process Description Including concentration, reaction time and largest successful run.	Required
Analytical Methods	Phase I Platform methods. Phase II and III Client methods – Required .
Delivery Date Include known milestones.	Required

This is how you up your game.

Put this Workbook to Work: This is a compilation of the best practices and advice from some of the best in the business. It is organized to seamlessly blend your selling process with your client's buying process and with the sales funnel. Put this workbook to work and results will come easier.

Make it Your Own: Bring your own best practices into the mix. What do you do at each stage that makes the difference between winning and losing?

Explore New Ways of Doing: The first step of doing better is to do differently. Try new things, reflect on the results and adopt the best as habit. This is a sure way to take your performance to the next level.

Lessons Learned: Win or lose, there are lessons to be learned from each deal. Pick three things that can be done better next time, and three successful tactics that you can adopt permanently into your selling process.

One Patheon: Develop positive working relationships throughout the organization. You are part of a team that includes some of the most highly regarded experts in the industry. Their knowledge and experience will make all the difference in your client's success and your own.

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