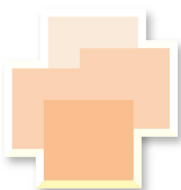


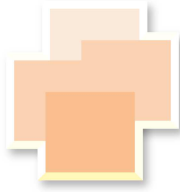


CHETOCHINE
CONSULTING GROUP

**The end the world not, the reality
of new challenges, yes!**

**Assessment of 2011 and outlooks
for 2012 of training courses in the
pharmaceutical industry and
healthcare**





Introduction

Chetochine Consulting Group is a consulting group specialized in the pharmaceutical industry and healthcare.

Since 1967, we have cooperated, advised, and trained hundreds of companies in the pharmaceutical industry, and thousands of managers and representatives in the world.

We strongly believe in our commitment and our methods, and the strength of the relationship with our customers. We wish to share with you our vision and our strategic solutions for the pharmaceutical industry in France and in all countries for 2012.

Good reading, and above all we wish you a Happy New Year 2012!

Sincerely,



Vladimir Chetochine	Françoise Chetochine	Fabien Dumas
Project Manager	General Manager	Training Director

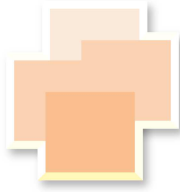


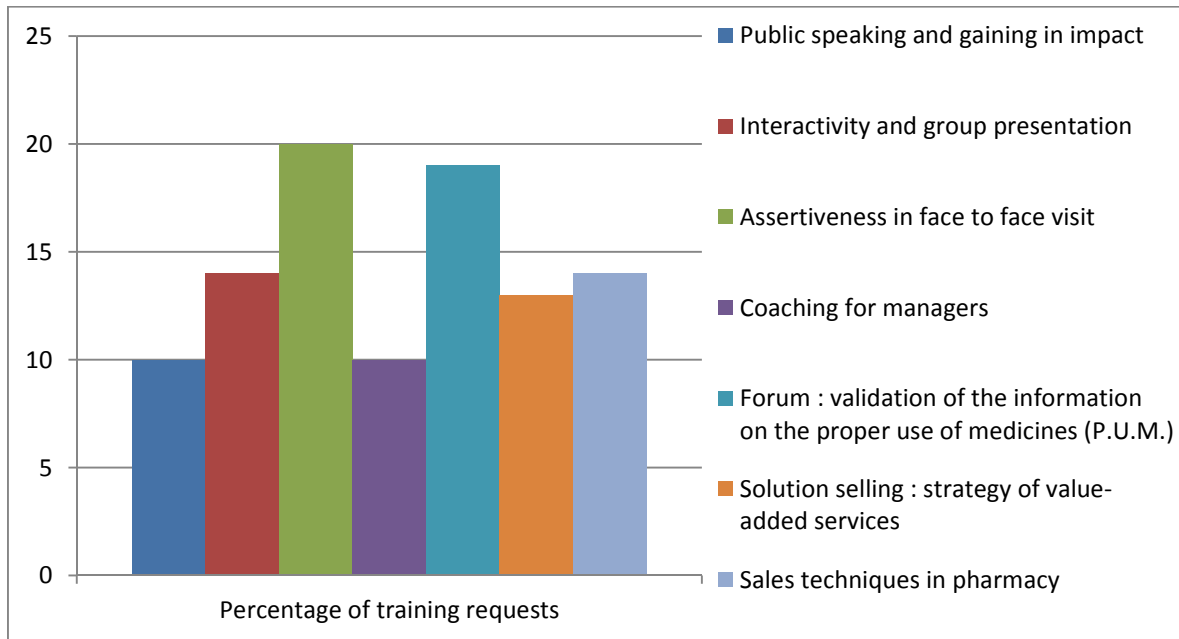
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Assessment of training requests in France for 2011

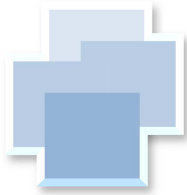
Training requests in France for 2011



Through our observations, we can see a strong demand from the industry for training courses on themes of communication. Trainings such as "Public speaking and gaining in impact ", "Interactivity and group presentation" or "facilitate a professional meeting" are higher compared to other years. For us, the message is clear: It is important for managers, as well as for representatives adapt to the new orientations of the medical visit in the city, pharmacy, growing evolution and changing regulation in the hospital.

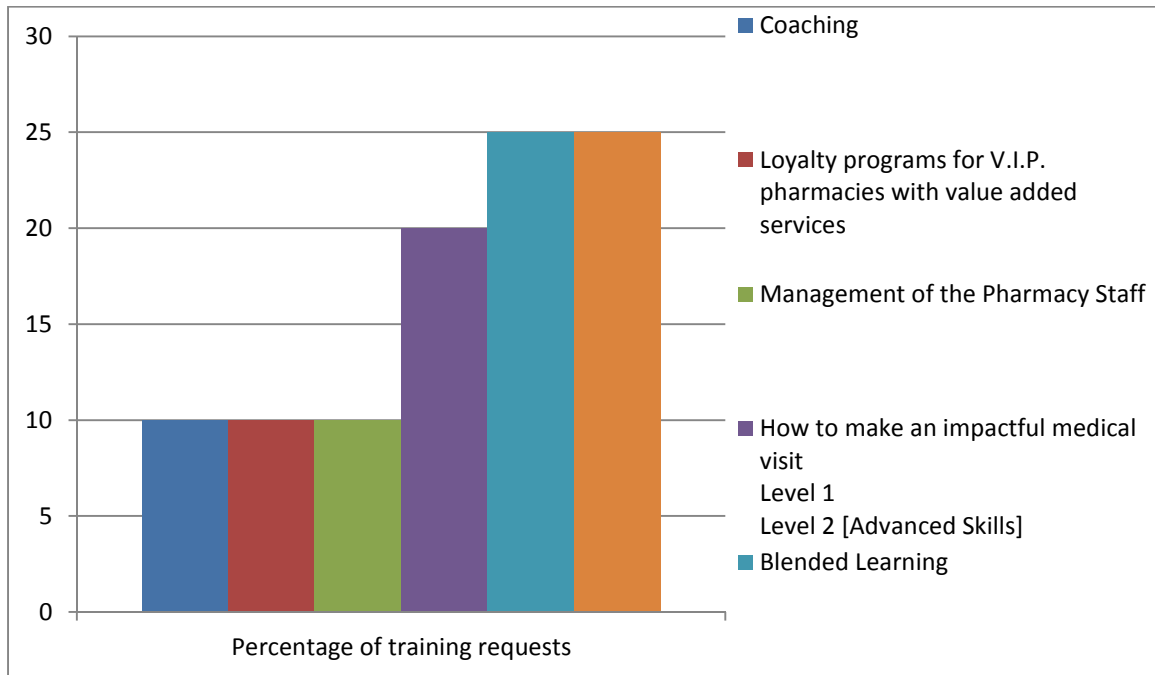
Trainings such as « Forum: validation of the information of the proper use of medicine P.U.M. », « Assertiveness in face to face visit » correspond to the growing demand for professionalism and development of soft-skills of the teams.

The training courses on sales techniques in pharmacy are up from previous years. There is a new need to train medical representatives who are transitioning into pharmacy representatives, which confirms the new role of the pharmacy.



Assessment of International training requests for 2011

International training requests in 2011



Our International division, which operates in, among others, Brazil, Mexico, Canada, Algeria, Tunisia, Morocco, Russia, Greece, Spain, gathering a wealth of information on the attitudes of emerging markets, but established.

The training courses on sales techniques like « How to make an impactful medical visit, Level 1 and Level 2 [Advanced Skills] », « Best practices for the pharmacy visit » reflect the needs of the pharmaceutical industry in these markets.

The training courses on management techniques such as « Loyalty programs for V.I.P. pharmacies with value added services », « Management of the pharmacy staff » are up compared to other years, demonstrating a strong growth in demands on the pharmacist, critical player in the healthcare division of the pharmacy team in the development of customer demand.



Forecasts of challenges in France for 2012

1. The economic crisis

According to a report INSEE from December 16 2011 « The business climate indicator in France [...] loses 1 point from November to December. It is now at 92 points, still significantly below its average [...] »¹.

The crisis, which continues now since 2008, is not yet complete and may continue until late 2012. Crisis signifies a gloomy atmosphere, fearful consumers or even non-existent, reduced sales figures, in short, conditions less than favorable.

2. The media and political climate

The National Assembly adopted on December 20, the legislation N°3714 called « Projet de Loi relatif au renforcement de la sécurité sanitaire du médicament et des produits de santé. »²

In an IFOP³ poll, 72% of the French think « that the pharmaceutical industry should contribute financially », as a solution to finance the healthcare system.

3. The new reality of the "patient as a consumer"

A survey conducted by IPSOS public affairs the consequences of Internet use on the relationship patients – doctors⁴, shows that 89% of patients get their information in the area of health with their doctors, 64% on the internet, and 63% with their pharmacist. Among these sources, 90% of patients have confidence in doctors, 40% in the pharmacist and 17% in the internet.



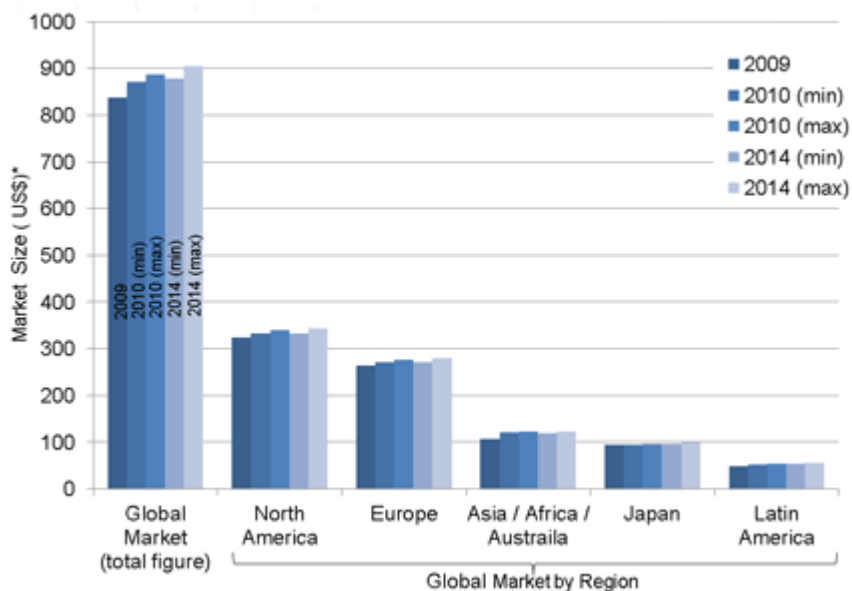
Forecasts of International challenges for 2012

1. The economic crisis

According to a UN report on World Economic Situation and outlooks for 2012, « Global economic growth began to decelerate on a broad front in mid-2011 and this slow growth is expected to continue in 2012 and 2013. The United Nations estimates the growth of gross world product (GWP) to 2.8 percent in 2011, and its baseline forecast projects growth of 2.6 percent for 2012 and 3.2 percent for 2013, which remains below the pre-crisis pace of global growth »⁵.

Despite the crisis, according to « IMS Health World Review Analyst 2010 »⁶ by IMS, growth forecasts in the pharmaceutical industry are favorable in the future.

Figure 2 – Global pharmaceutical market forecast, 2009-2014



2. The media and political climate

Several governments around the world are changing their rules on the pharmaceutical industry. In the U.S.A., we have the « Physician Payment Sunshine Provisions »⁷, the European Union has more and more precise rules on Pharmacovigilance⁸.

Public opinion on the pharmaceutical industry is not at the best, in a study by Harris Poll Interactive⁹, 8% of the population has confidence in the pharmaceutical industry, a deterioration of 3% compared to last year.

3. The new reality of the "patient as a consumer"

A survey conducted by Think Health with Google¹⁰ shows that 65% of patients in the United States seek information on diseases via internet, against 53% with their doctors, and 28% with their pharmacists. In the same study, 75% of patients are researching their symptoms on the internet before talking with their doctors.



Which Chetochine Solutions for 2012

Taking into account the three challenges in France and internationally for 2012, a “weak economy”, a media and political climate less than satisfactory, and a hyper informed patient, here are a few axes of solutions proposed by Chetochine for 2012.

Solutions for laboratories

A laboratory must rely on their managers they must be able to coach, have an exemplary leadership, and have teams that work in synergy with the expectations of the laboratory and environmental constraints. Our training courses on **coaching**, **situational leadership** and **assertiveness** are important tools to evaluate and develop a sound framework for the Regional Directors, managers, to develop their potential and skills. Marketing and product managers need to develop presentation materials adapted to the new regulations.

Blended Learning, our new training tool, combines new technologies for teaching for adults with our know-how, in terms of training.

Blended Learning has three major advantages:

- Firstly, our platform, developed by Actando, allows representatives to follow an intense continuous training rich in simulations on communication in medical visits, How to make an impactful visit in a pharmacy, and other topics coming in 2012.
- Secondly a cost / benefit ratio very favorable, for each day of training, laboratories have representatives coming from all parts of France (or country), with the expense of travel, accommodation, losses associated with the representative being out of the field, etc ... These expenses are often more expensive than the training itself. Thanks to our platform and our teaching methods, we allow laboratories to maximize skills development of representatives, while promoting the optimization of costs associated with this training.

- Thirdly our approach to **blended learning** relies on the commitment of local managers in training and monitoring of the teams through our coCKPit (**Key Performance Indicators**). The cockpit, unique in the industry, allows the monitoring of representatives in real time, identifying strengths, weaknesses of each delegate, for an optimization of networks.

Solutions for managers

Managers must have close-knit teams, efficient and assertive to ensure that information on products and services are passed on better and in an ethical and transparent atmosphere. Our training courses such as **Forum: validation of the information of the proper use of medicine P.U.M., Interactivity and group presentation, the assertive medical visit**, are the best ways to assess and validate the professional quality of the networks.

Solutions for pharmacists and pharmacy team

Facing the new reality of the patient, physicians are faced with hyper informed patients, which does not always mean well informed. Pharmacists are taking a greater role in the patient's life.

It is necessary for pharmacies that pharmacy technicians and the pharmacy team is still performing at the level of the welcome, advising, merchandising, management of the patient. **Our range of training courses on the proper functioning and development of the pharmacy team** contributes to the search for optimization of the average basket of the patient, improved patient flow, and better management of the patient's needs.



1. <http://www.insee.fr/fr/themes/info-rapide.asp?id=105&date=20111216>
2. <http://www.assemblee-nationale.fr/13/projets/pl3714.asp>
3. http://www.ifop.com/media/poll/1646-1-study_file.pdf
4. Ipsos Public Affair – Les conséquences des usages d’internet sur les relations patients-médecin – Avril 2010
5. http://www.un.org/en/development/desa/policy/wesp/wesp_current/2012wesp_pr_fr.pdf
6. <http://www.abpi.org.uk/industry-info/knowledge-hub/global-industry/Pages/industry-market-.aspx#fig1>
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