

Respondents work for a diverse set of companies.

Respondent Employers

	Sales Representatives (n = 176)
GlaxoSmithKline	10%
Sanofi-Aventis	9%
Pfizer	9%
Abbott Laboratories	7%
Schering Plough	5%
Merck	5%
Boehringer Ingelheim	5%
AstraZeneca	4%
Sepracor	4%
Johnson & Johnson	3%
Eisai	3%

Note: Only companies with >=3% are reported.

	Sales Managers (n = 29)
GlaxoSmithKline	10%
Forest Laboratories	10%
AstraZeneca	7%
Sanofi-Aventis	7%

Note: Only companies mentioned by > 1 respondent are reported.

RQ.3/MQ.3

Roughly half of all respondents call on PCPs.

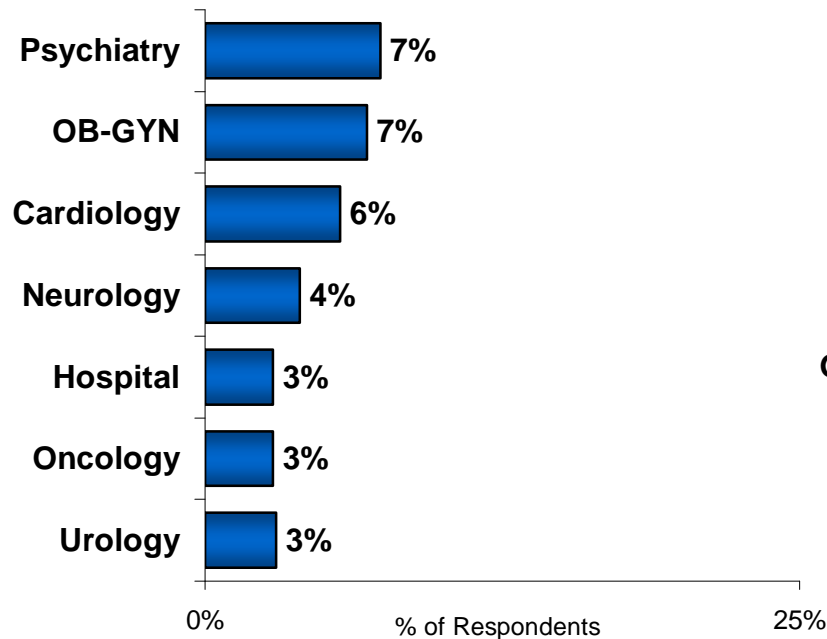
Physician Specialty to which Primarily Promote

Sales Representatives

(n=176)

Mean

PCP → 51%
Specialists → 49%



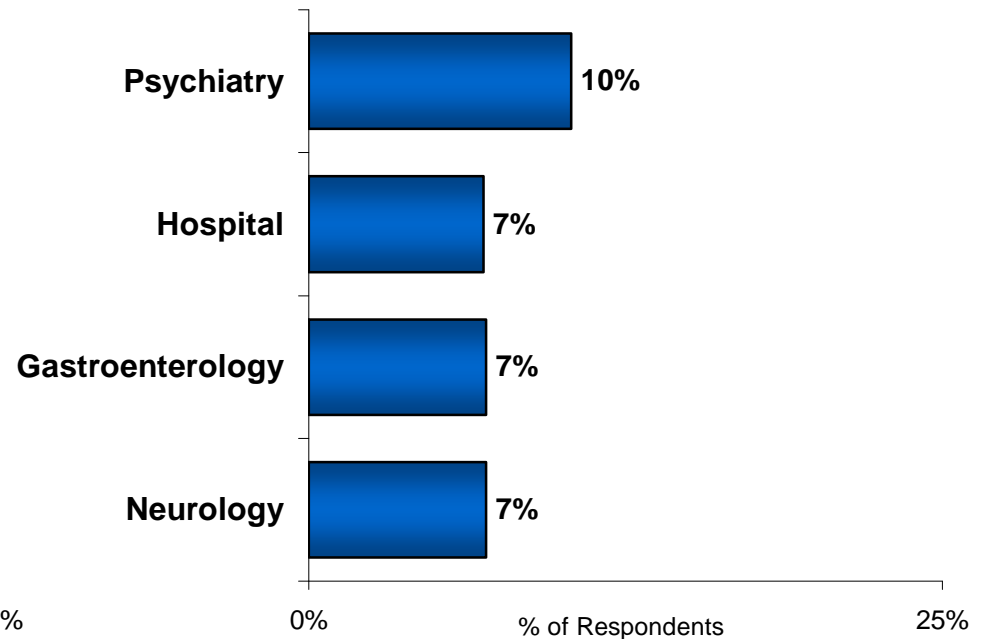
Note: Only companies with >=3% are reported.

Sales Managers

(n=29)

Mean

PCP → 45%
Specialists → 55%

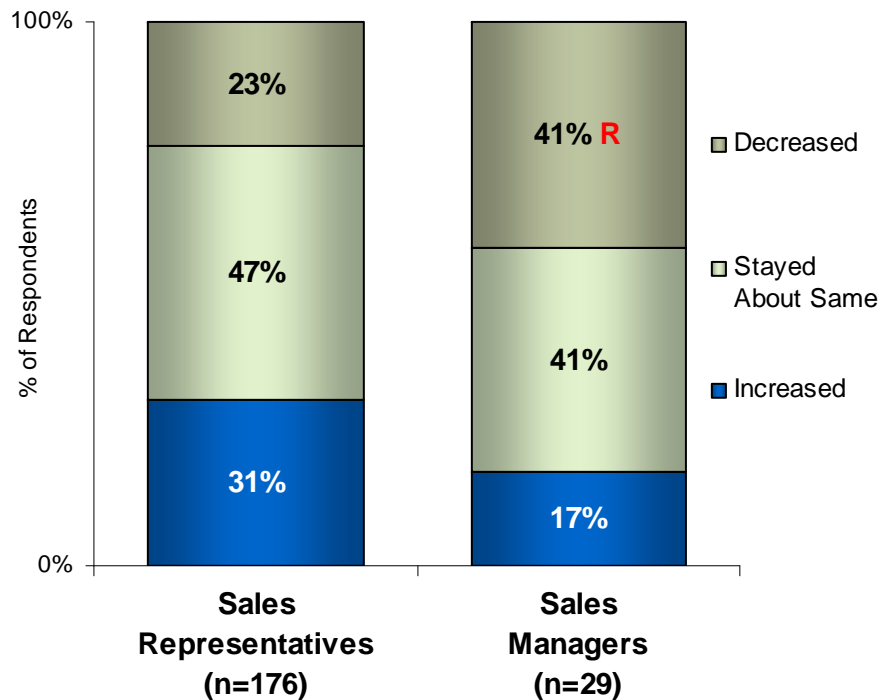


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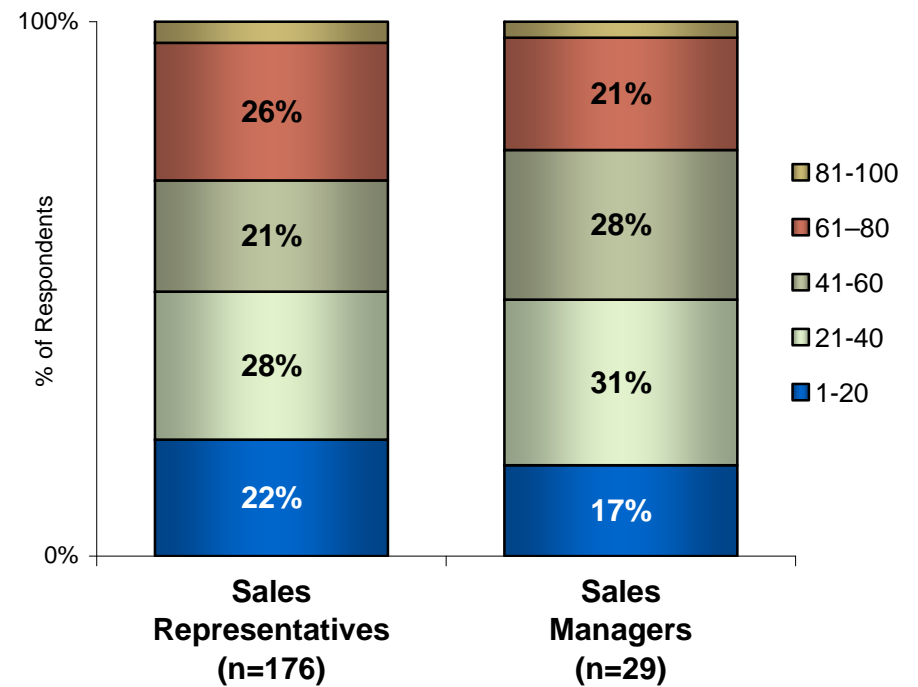
RQ.8,8a/MQ.8,8a

Managers are more likely than reps to believe that time with physicians has declined in the past year. Time to adequately detail/ sell to physicians is available in less than half of sales calls.

Trend in Amount of Time Spent with Physicians Over the Last 12 Months



Percentage of Time Reps Can Adequately Detail or Sell to Physicians



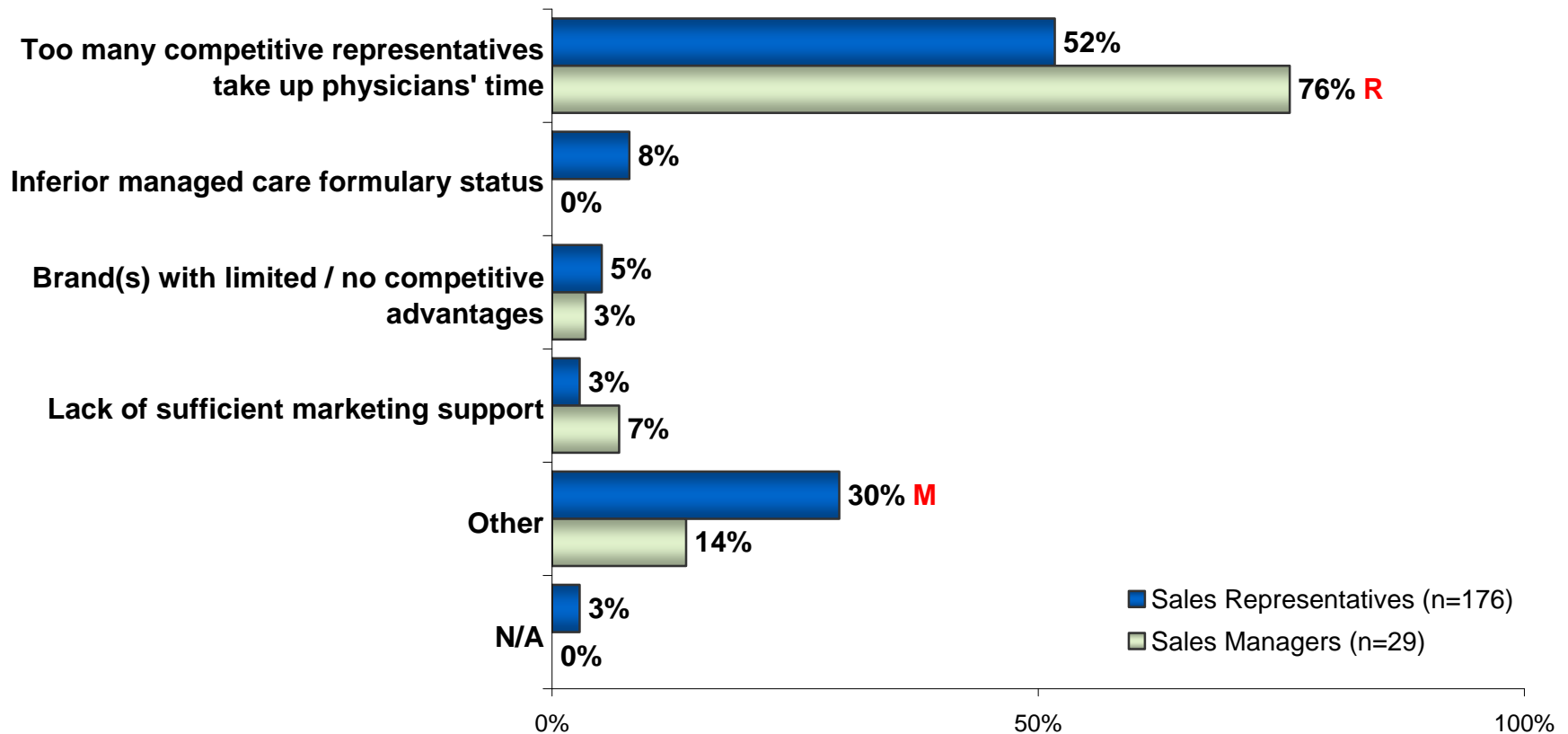
Mean	46.1	45.3
Median	45	50

R/M indicates value is significantly greater than (Representatives/Managers) value at a 95% confidence level.

RQ.B1,B2/MQ.B1,B2

“Too many competing representatives” is cited as the key reason reps have limited time to detail physicians. Managers feel more strongly about this than reps.

One Most Significant Reason for Lack of Time Reps Have Available to Detail Physicians

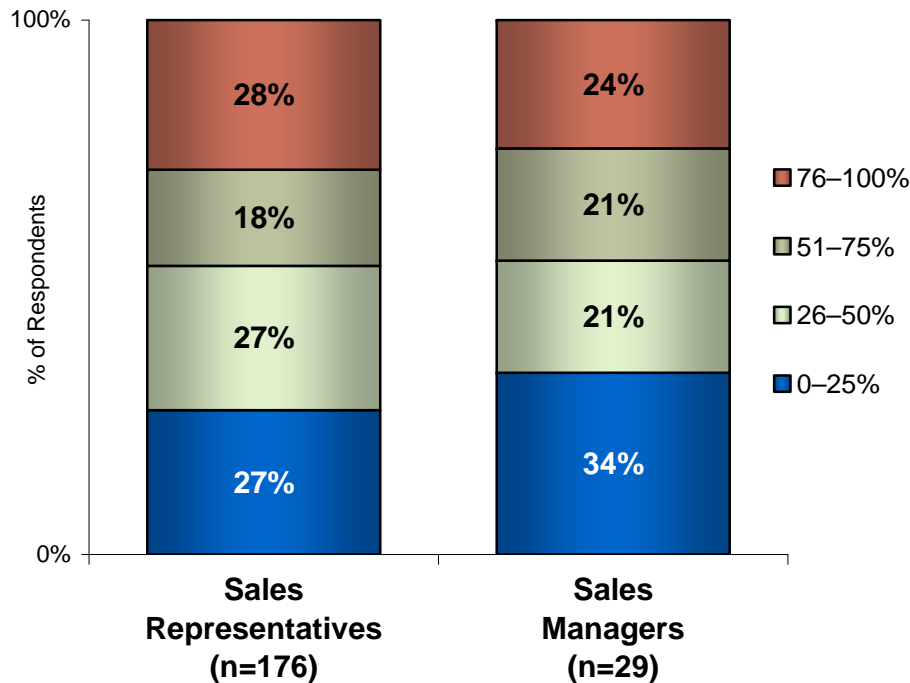


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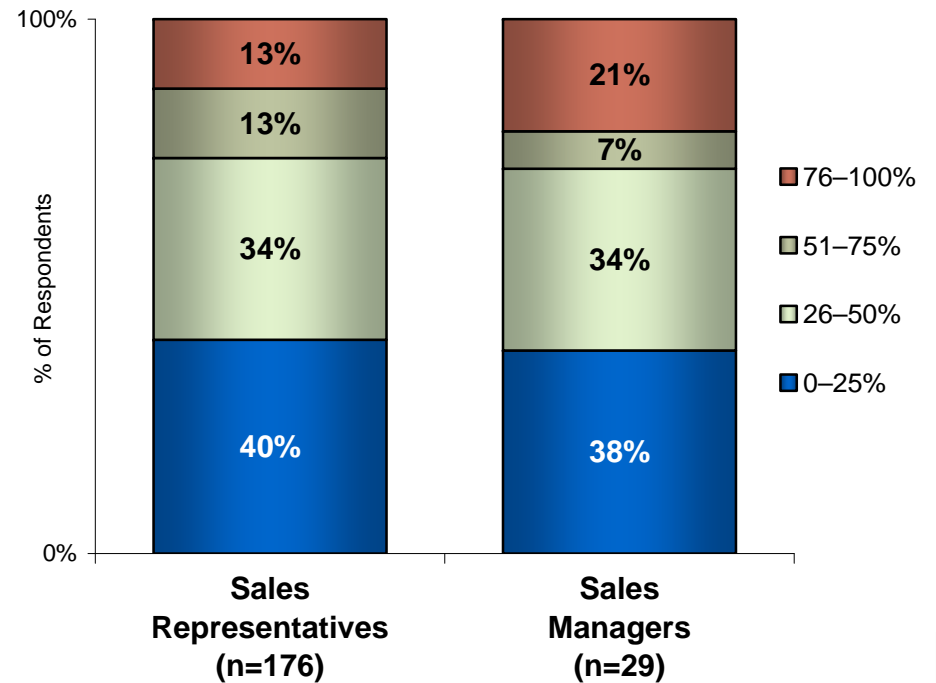
RQ.B3/MQ.B3

Respondents believe that roughly half of the physicians they call on would not see a rep if no samples were provided. They say they provide new information less than half of the time.

Percent of Physicians Who Would See Rep If No Samples to Provide



Percent of Reps' Details in which Present New Information to Physicians



Mean	54.0	50.3
Median	50	50

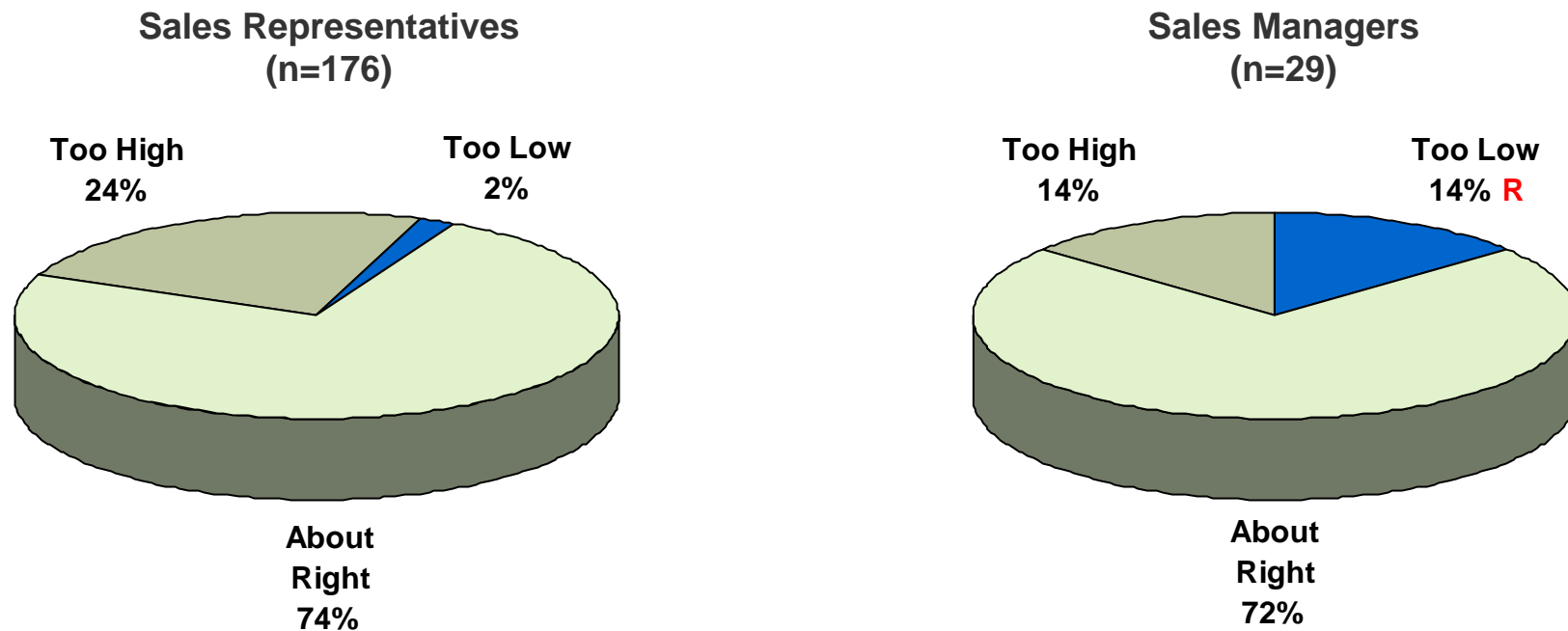
Mean	42.1	41.4
Median	40	30

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RQ.B5,B6/MQ.B5,B6

Nearly three of four reps agree that management’s expectation for call frequency is “about right.” More managers than reps believe expectations are too low.

Management Expectations of Rep Call Frequency

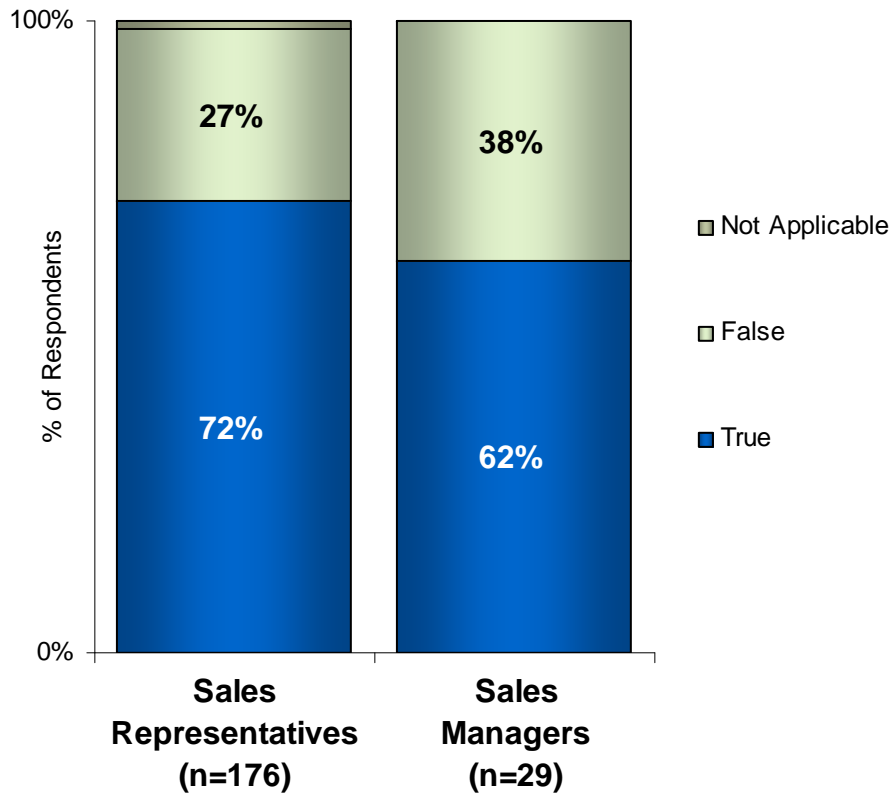


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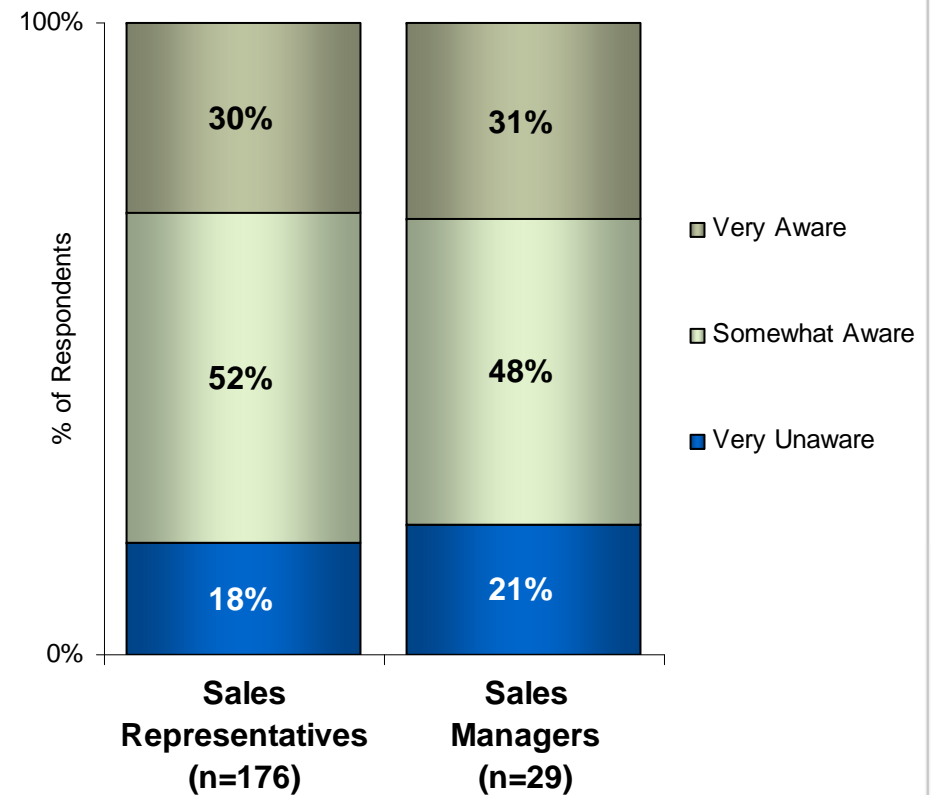
RQ.C1/MQ.C1

Most say Marketing provides necessary resources to reps, but only three out of 10 think Marketing is “very aware” of “what’s going on” in the field.

In Terms of the Lead Brand: “I Believe the Marketing Department Does a Satisfactory Job of Providing Reps with the Necessary Resources to Compete.”



Awareness of the Marketing Department about “What’s Going On” in the Field

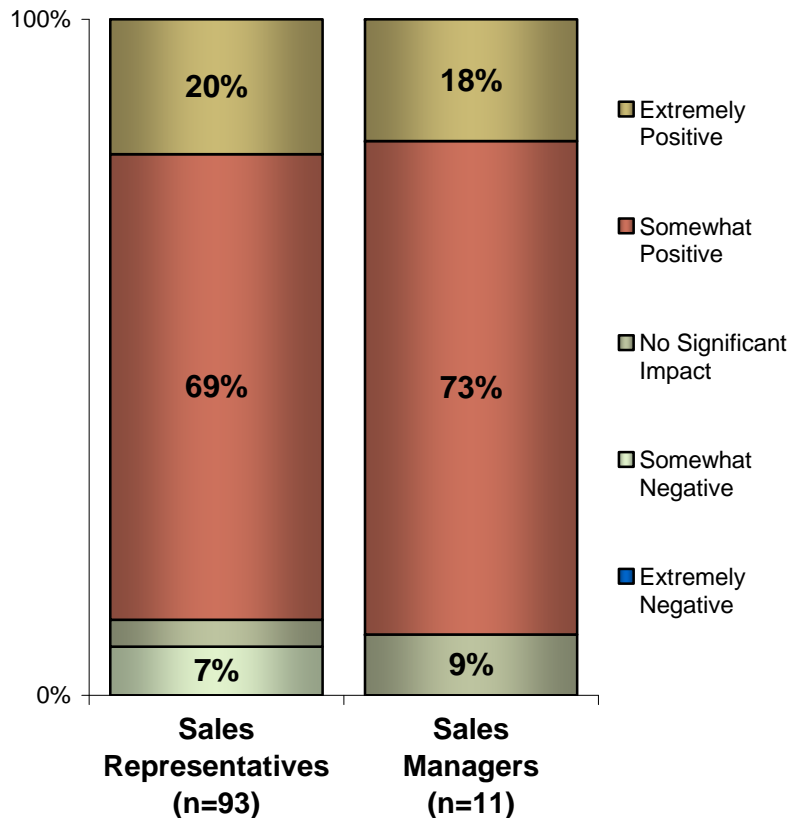


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RQ.C6,C7/MQ.C6,C7

The perceived impact of DTC advertising on sales is overwhelmingly positive, due to increased brand awareness and motivation for patients to visit their physician.

Impact of DTC Advertising on Reps' Sales Results



Nature of Impact of DTC Advertising on Rep's Sales Results

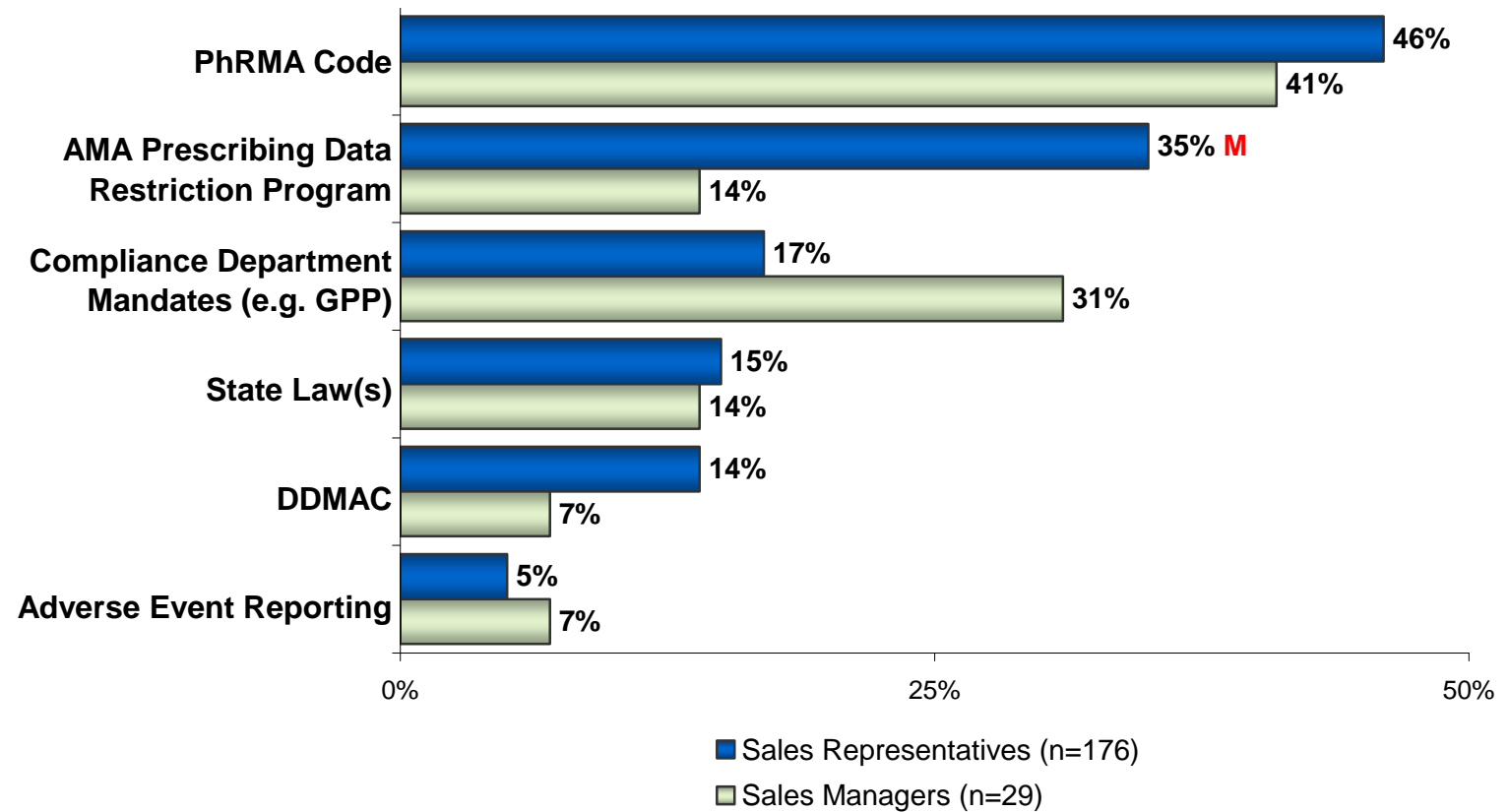
	Negative Impact (Extremely or Somewhat) (Rep n=6; Managers n=0)	Positive Impact (Extremely or Somewhat) (Rep n=83; Managers n=10)
Sales Reps (n=89)	33% Some advertisements have negative effect on sales	48% Brand awareness/ Identity/ Recognition among consumers/ MDs
	17% Consumers aware of disease state/ consumers know product use	35% Consumers want to try product/ Going to doctor asking about it
		12% Consumers aware of disease state/ Consumers understand what prod. is used for
		8% Increase in sales/ Market share
		6% More noise about brand
Sales Managers (n=10)		20% Brand awareness/ Identity/ Recognition among consumers/ MDs
		20% Consumers want to try prod/ Going to Dr. asking about it
		20% Increase in sales/ Mkt share
		10% More noise about brand

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RQ.D3,D4/MQ.D3,D4

Reps and managers agree that the PhRMA code is the guideline that most negatively impacts their performance. More reps than managers perceive a negative impact of the AMA Prescribing Data Restriction Program.

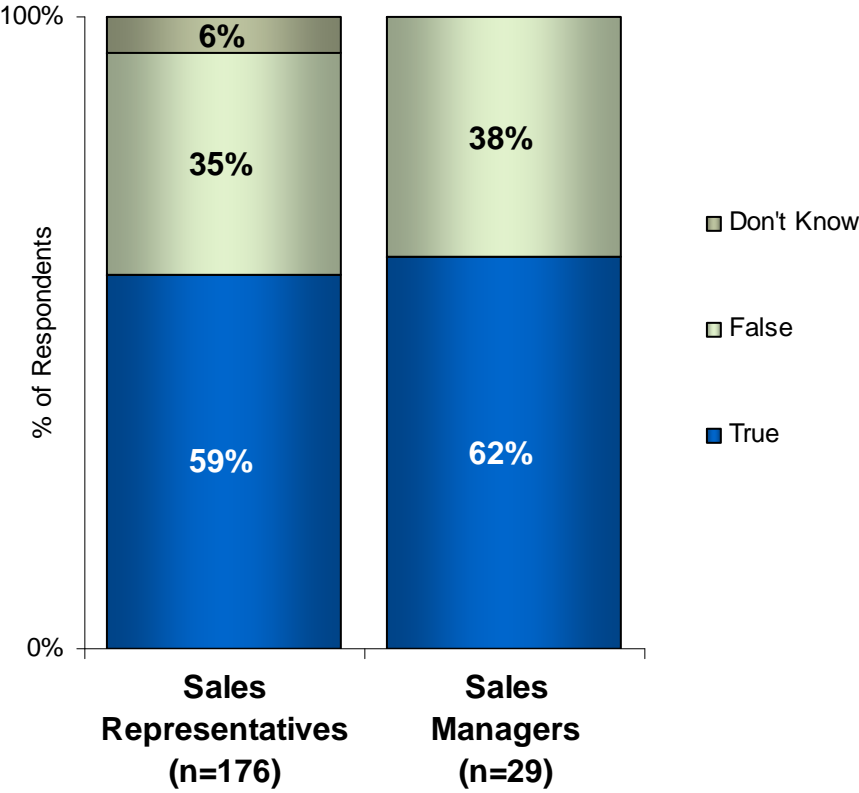
Level of Impact of Each Guidelines/Regulation on Reps' Job Performance
*Negative Impact – % Bottom Two Box (Out of Five)**



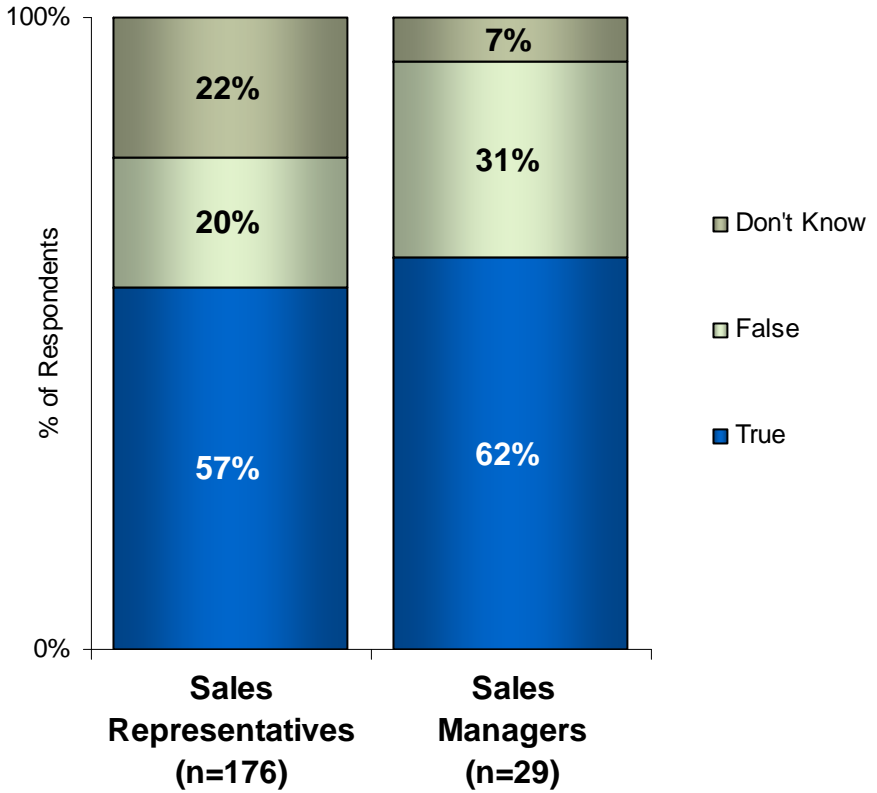
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 Scale: (1) Extremely Negative Impact – (5) Extremely Positive Impact
 RQ.E1a-E6a/MQ.E1a-E6a

While most respondents believe rep compensation is fair and/ or competitive, there is a sizable minority who disagree.

“I Believe That My / My Reps’ Current Performance Compensation Plan Is Fair.”



“I Believe That My / My Reps’ Current Performance Compensation Plan Is Competitive with Other Healthcare Companies.”



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 RQ.F9,F10/MQ. Fp,F10

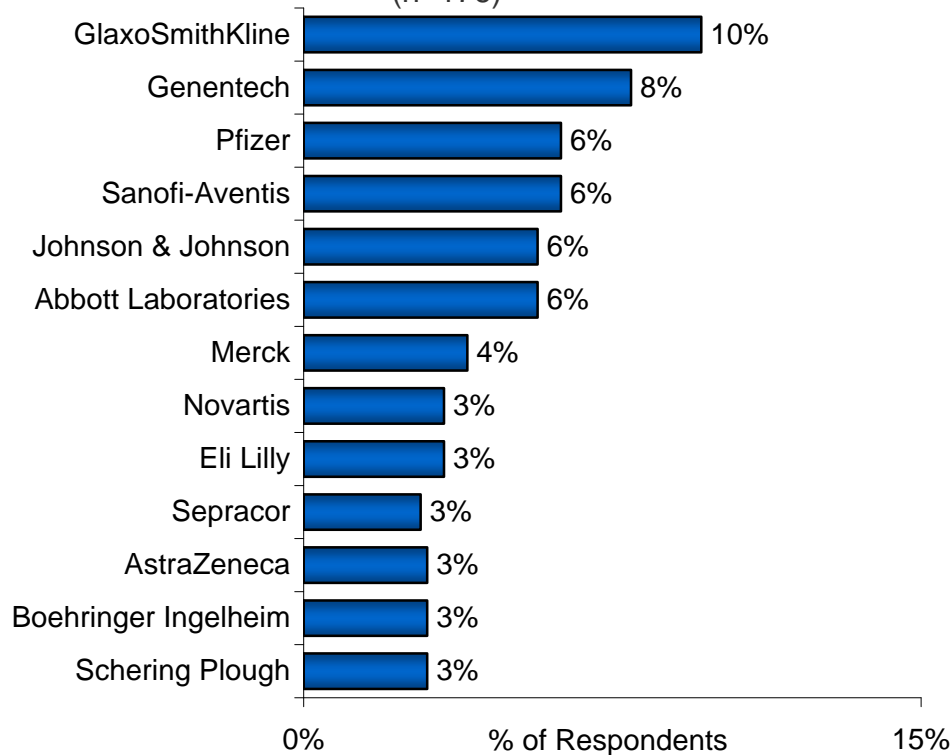
No one healthcare company dominates the field's respect. Reps commonly name their own employer as the company they most respect in the industry.

Healthcare Company Most Respected by Respondents

52% of reps and 24% of managers name their own employer.

Sales Representatives

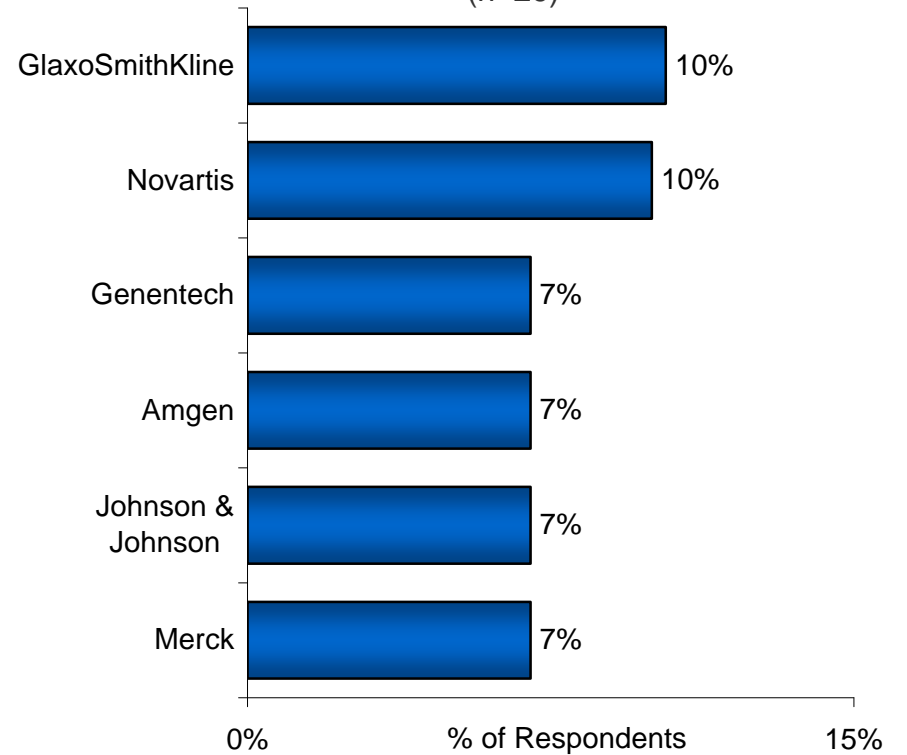
(n=176)



Note: Includes companies with 3% or more of mentions.

Sales Managers

(n=29)

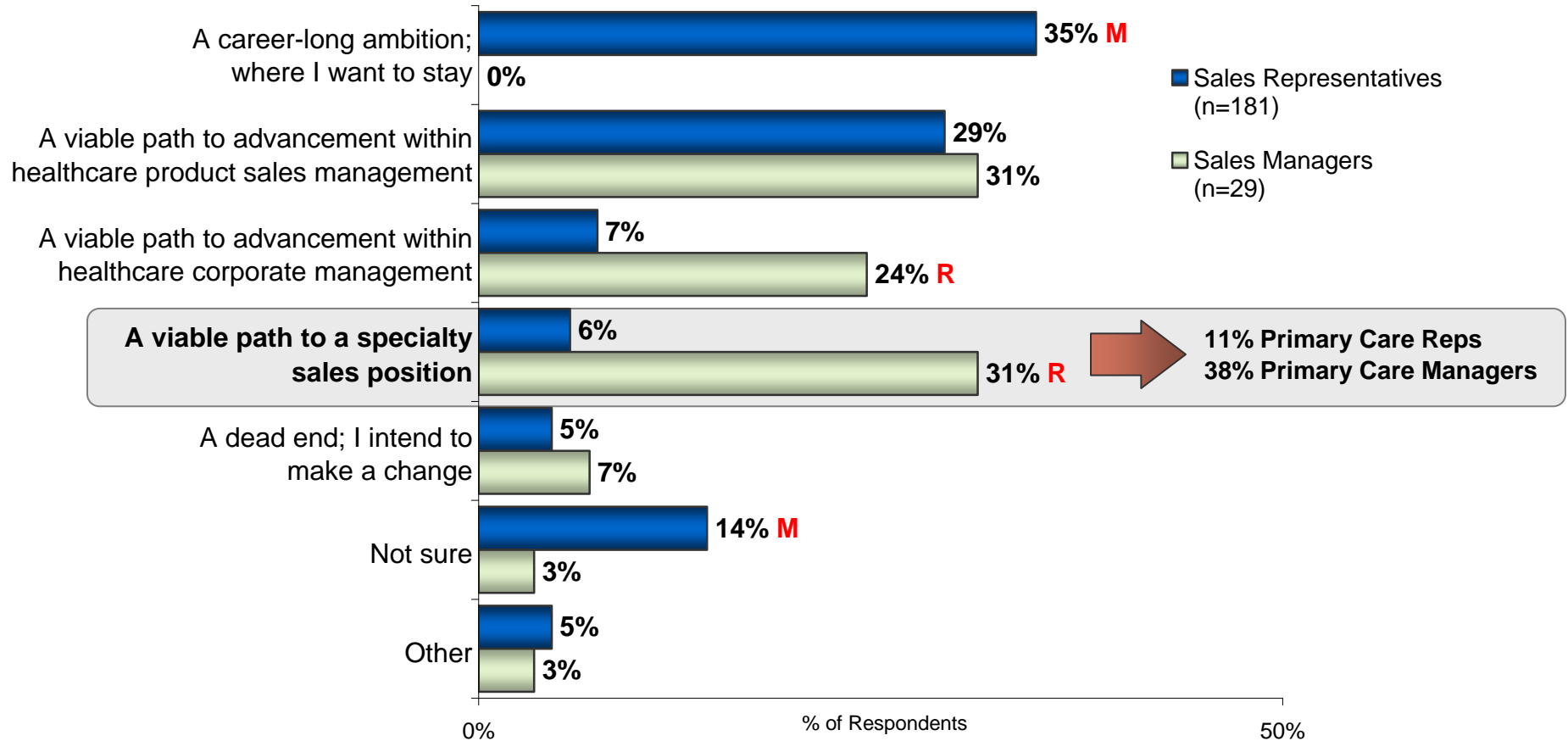


Note: Includes companies with 2 or more mentions.

RQ.G1a-G1b/MQ.G1a-G1b

Many managers see their current position as a viable path elsewhere, while roughly half of the reps define their current position either as their career-long ambition or do not know what they want to do next.

Classification of Reps'/Managers' Existing Job



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RQ.G4/MQ.G4