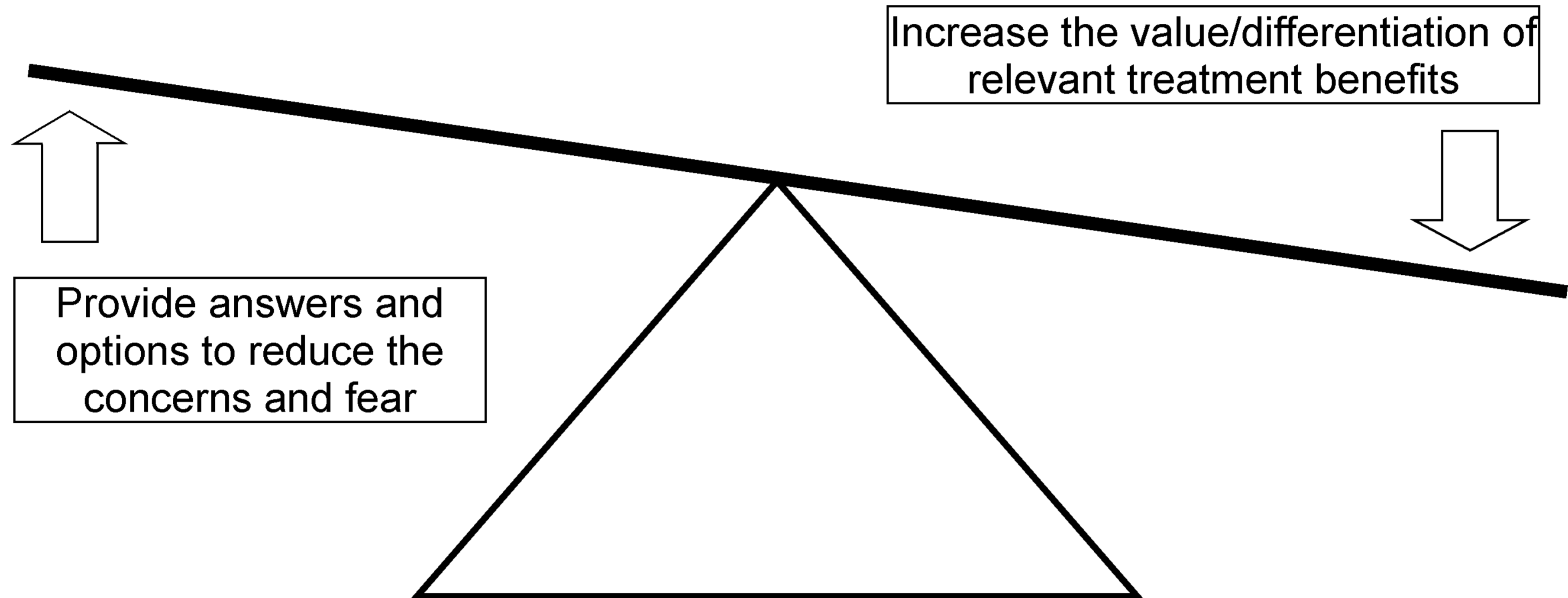


Marketplace Strategy



Zyprexa offers you the most dependable choice for helping patients get better and stay better

Overview

- Perceptions and implications around weight continue to be our most significant issue
- In the US, our most mature market, shares are declining at an alarming rate—across our core business
- Competitive share of voice around weight gain is increasing—and we expect that this will only accelerate as new competitors enter each market
- In order to effectively compete, we must increase and maintain credibility with our customers regarding our understanding of their challenges and that Zyprexa is not for everyone
- We must provide meaningful answers through a variety of wellness solutions to our customers

The Marketplace Message

- Weight gain leads to increased risk factors and non-compliance
- Increased risk factors can lead to serious complications
- There is differential risk and complicated monitoring associated with Zyprexa

Marketplace Tracker - Key Findings

1. Psychs agree that they can depend on Zyprexa, but they are less confident using it. **Feeling confident in Zyprexa and believing that benefits outweigh negatives is correlated to an intent to increase prescribing in most markets.**
2. While Psychs in all markets are leaning towards noticing a change in Lilly's tone and approach and the recognition that weight gain can lead to other problems, **they do NOT believe that Lilly fully acknowledges that these patients are difficult to manage.**
3. Except for in Spain and Italy, **Psychs do not fully recognize Lilly's service and support** or efforts to provide options for weight gain.
4. **Zyprexa has both strong positive perceptions, primarily around efficacy, and strong negative perceptions, primarily around weight gain, in all markets.**

As competitive SOV increases, so does concern over weight gain...

	U.S.	Canada	UK	Australia	Spain	France	Germany	Italy	Japan
Risperdal	√	√	√	√	√	√	√	√	√
Seroquel	√	√	√	√	√		√	√	√
Abilify	√			√					
Geodon	√			√	√		√		
Solian			√	√	√	√	√		
Lullan									√
Depakote	√	√	√		√	√	√	√	
Lithium	√	√	√	√	√	√	√	√	√
Lamictal	√	√	√	√			√	√	

As markets mature, customers have:

- more treatment options;
- more negative noise; and
- more reasons to opt out of Zyprexa

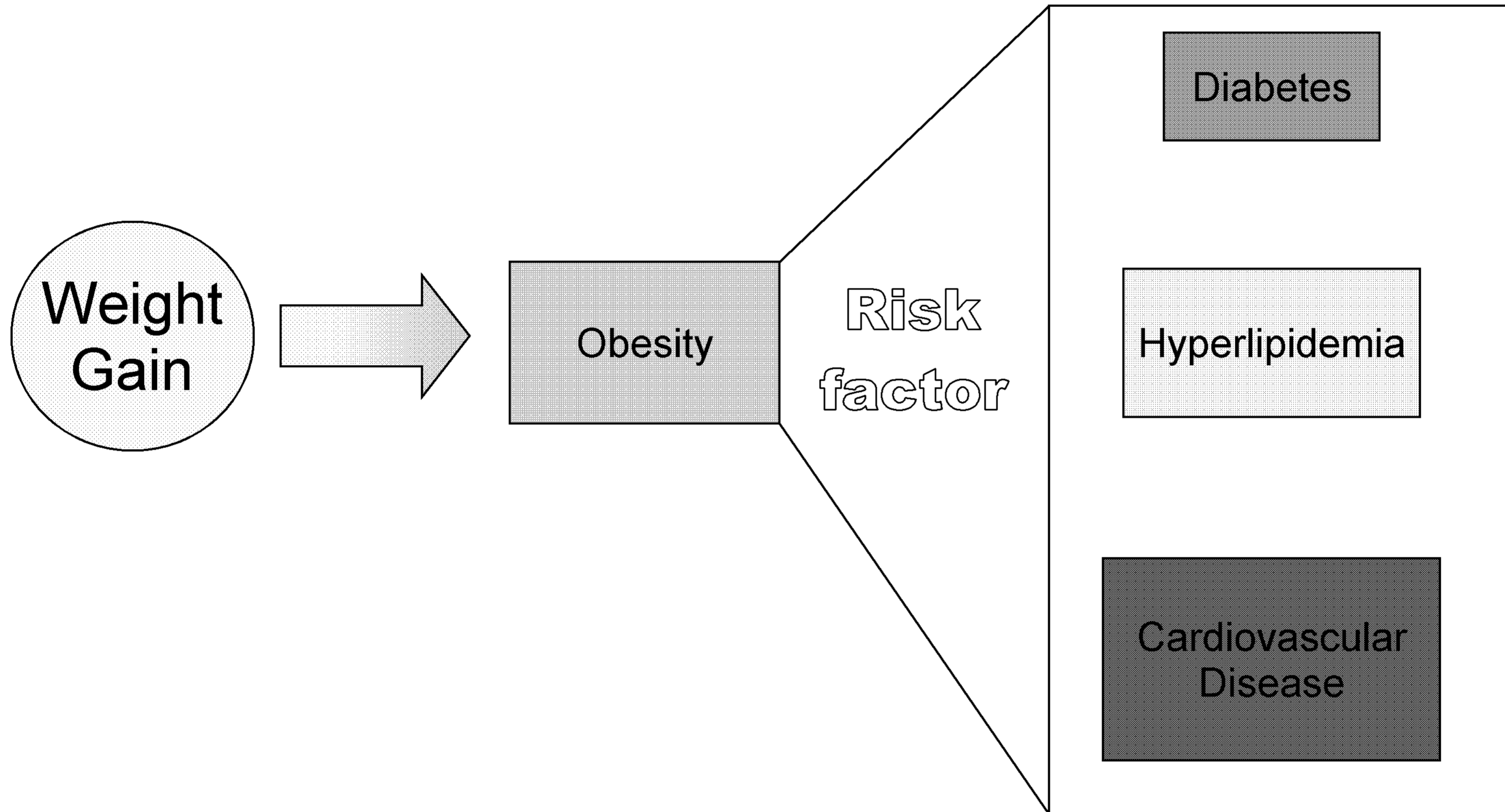
*U.S.: Non-decliner PSYCHs

The Law of Logic

- People are more subject to influence when they can follow a sequence of thoughts that make sense to them.
- Logic and clarity are essential to the influencing process because when people are confused they usually refuse to take action.
- A lapse in logic might:
 - Destroy trust
 - Negatively impact rapport
 - Damage credibility
 - Make you look unprepared, uninformed and/or unprofessional

From: The 21 Laws of Influence

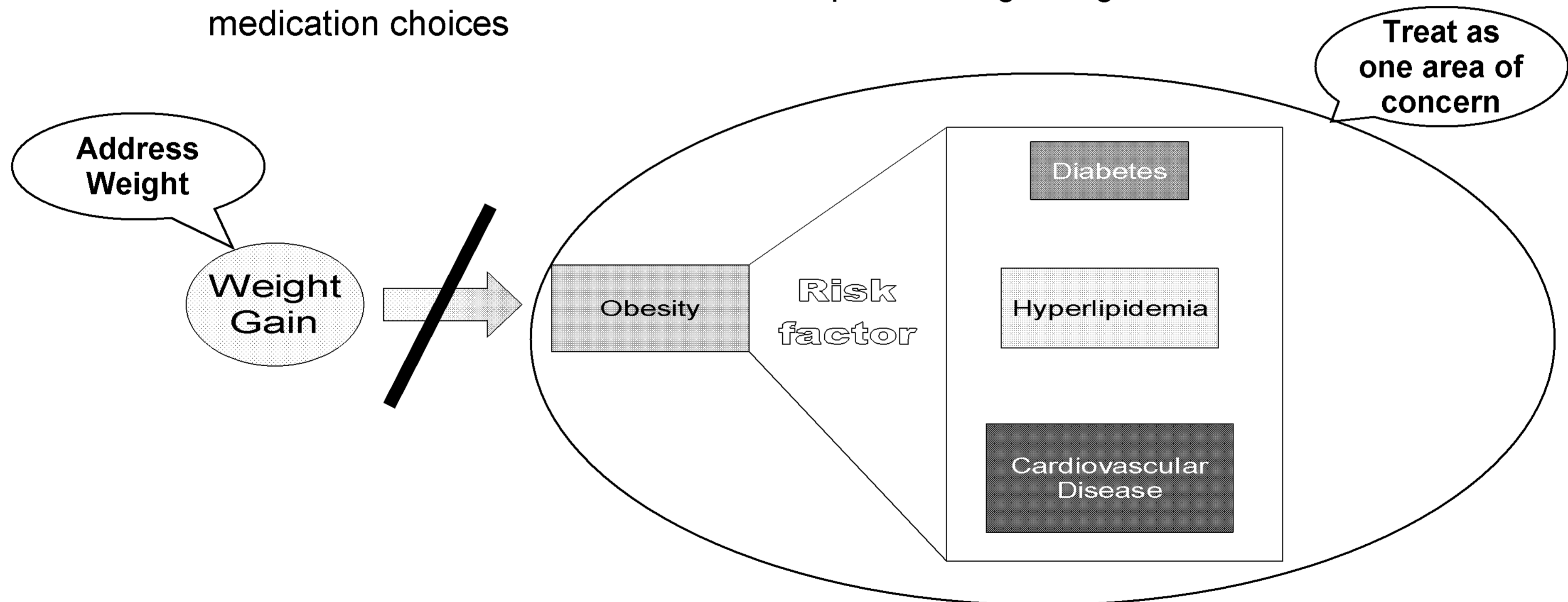
Weight gain is medically seen as a risk-factor to life-changing conditions



We will implement a new approach to focus on wellness by addressing concerns as one

Our Approach

- **Educate** MDs to address weight gain and consider metabolic issues (obesity, diabetes, lipids, cardiovascular) as one interlinked concern
- **Be a Resource** to MDs by providing interventions to address weight gain in patients and reduce risk of onset of other life-changing conditions
- **Influence** MDs to have discussion with patients regarding the risk/benefit of their medication choices



The Law of Belief Replacement

- People are willing to change their beliefs ONLY when they are replaced by other beliefs that, at the very least, are equally valid in their minds.
- To change peoples minds, make a suggestion and then introduce a solution.

From: The 21 Laws of Influence

Weight Management

Zyprexa may not be for everyone

		Efficacy	
Weight Gain	Lo/No Efficacy	Efficacy	
	Weight Gain	Weight Gain	
Lo/No Efficacy	Lo/No Weight Gain	Efficacy	
Lo/No Weight Gain	Lo/No Weight Gain	Weight Gain	

		-W	Efficacy	WE
Weight Gain	<ul style="list-style-type: none"> • Expect early efficacy • Try another option 	<ul style="list-style-type: none"> • Consider the trade-off • Weight intervention • Appropriate monitoring • Switch if appropriate 		
	<ul style="list-style-type: none"> • Push the dose • Add on strategy • Wellness intervention 	<ul style="list-style-type: none"> • Maximize patient functioning • Wellness intervention 		
		--		-E

implementation

Shared learning from EMS

Female, 22 years old, fully employed as a nurse

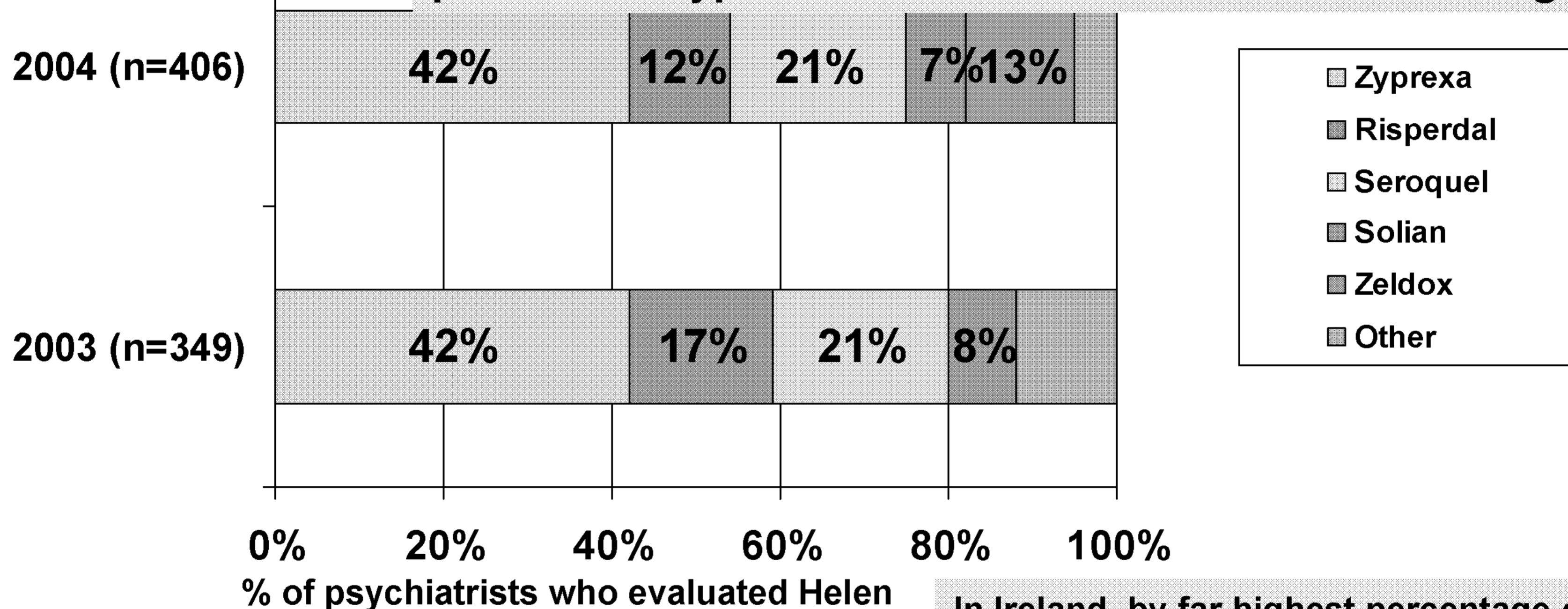
- Diagnosed with schizophrenia.
- After a second psychotic episode she was prescribed olanzapine (10mg per day). She has now been stabilized and has returned to work as a nurse.
- In consequent monthly check ups the patient's condition has been very satisfactory.
- During the current check up (6 months after the second psychotic episode) the patient mentions that she is concerned about having gained some weight. Her weight has increased from 55kg to 59kg.

Helen's profile was presented to 484 psychiatrists:

- **406 psychiatrists (84%) were familiar with this type of patient**
- **78 psychiatrist (16%) was NOT familiar with this type of patient**

We can reverse the trends in switching!

Like last year, 6 out of 10 psychiatrists would take this patient off Zyprexa and switch her to a different drug.



% of psychiatrists keeping Helen on Zyprexa

In Ireland, by far highest percentage of psychiatrists would keep Helen on Zyprexa.

2004 Zyprexa	26%	57%	21%	46%	48%	77%	48%	44%	60%	20%	28%

The Marketplace Scorecard

<i>Element</i>	<i>Objective</i>	USA	AUS	FRA	SPA	UK	JAP	CAN	ITA	GER
Competition										
Top of mind schizophrenia efficacy mentions	Zyprexa=Risperdal									
Foundational therapy in schizophrenia	Zyprexa=Risperdal									
Top of mind bipolar efficacy mentions	Zyprexa leads AP									
Foundational therapy in bipolar disorder	Zyprexa leads AP									
Foundational therapy in bipolar disorder	No movment for competitors									
Helps to delay relapse into mania and depression for bipolar disorder	Zyprexa leads AP									
Discontinued by patients due to lack of efficacy	Abilify increase									
Discontinued by patients due to lack of efficacy	Seroquel increase									
Issues										
Top of mind weight gain mentions	No movment for Zyprexa									
Top of mind diabetes mentions	No movment for Zyprexa									
Benefits outweighs negatives										
Discontinued by patients due to side effects										
Provides patient satisfaction										
Belief Statements										
I fell confident in addressing the medical needs of my patients when treating with Zyprexa										
Risk factors for diabetes are more prevalent in my patients with sever and persistent mental illness than in the general population										
No consistent differences between atypicals in the risk of treatment emergent diabetes										
I appreciate Lilly's tone and approach - they have demonstrated that they understand the potential wieght gain challenges I face when prescribing Zyprexa										
Lilly acknowledges that when a patient on Zyprexa gains weight, it is difficult to manage.										
Lilly is providing me with options that help me addresss weight gain in some of my patients, which enables me to keep those patients on Zyprexa longer										
Prescribing Intent										
Future prescribing intent	% decrease declines									

Deliverables and Expectations

- Global Marketplace Team
 - Develop clinical question and answer brief
 - Develop/roll-out communication and training plan for a clinical Q&A regarding weight gain and related conditions
 - Development and implement marketplace tracker scorecard
 - Own the Marketplace Managers Conference/Virtual Team
 - Marketplace issues monitoring activities, communication of analyses and resource development for affiliates
 - Build on shared learnings across affiliates
- Affiliate Marketplace Team
 - Participate in Marketplace Managers Conference/Virtual Team
 - Marketing plans improve on existing capabilities and awareness in resources and wellness solutions to match market needs
 - Build internal training programs and confidence building exercises into marketing plan
 - Build local metrics and message management plan to achieve Brand objectives of confidence and credibility

Strategy Overview

What's new

- More assertive recognition and acceptance that **Zyprexa may not be for everyone**
- The four quadrant model to facilitate the benefit/risk discussion

What's not

- We must continue providing meaningful resources through weight management and wellness solutions to our customers
- We will continue to analyze and report on new safety information regarding Zyprexa for affiliates