

Peer to Peer Speaker Program TM Guide – ZOLL LifeVest

The following guide is intended to provide Area Directors, Regional Managers, and Territory Managers a reference for conducting ZOLL Sponsored Peer to Peer Speaker Programs. All Documents referenced in this guide can be found on the LifeVest Network in the following location: LV Network/USA Sales/Sales Documents/Local Med Ed Programs.

This updated guide will provide a step-by-step process for the management and execution of local medical education programs and clarify key concepts.

This document supersedes all previous versions of speaker program guidance.

PEER TO PEER SPEAKER PROGRAM OVERVIEW

Requests for speaker programs can be submitted at <http://lifest.zoll.com/lmep>

Speaker Programs will be categorized as one of three approved formats:

- a. **Roundtable Programs** -- Peer to Peer Roundtables are small group discussion with peers.
 - i. Discussion will be conducted on specific approved topics and in accordance with pre-specified educational learning objectives.
 - ii. Attendees will be only physicians/providers with an NPI number. Target should be 3-4 attendees, not including the speaker or ZOLL attendees.
 - iii. No overnight travel will be necessary and no prepared slide content is required.
 - iv. Approved Educational Objectives must be signed by speaker and ZOLL representative hosting the Roundtable and uploaded into the JIRA system to document each program, in addition to sign in sheets and evaluation forms.
- b. **Local Medical Education Program (LMEP)**. Presentation to a group of peers and other Healthcare Provide.
 - i. Discussion will follow existing speaker slide deck topics (AMI, HF). Slide content is required.
 - ii. Attendees can be any HCP. Attendees with an NPI number are preferred. Target should be at least 10-20 attendees.
 - iii. Reasonable overnight travel may be necessary.
- c. **Remote Webinar Presentation**. Presentation online via webinar to various remote attendees with interactive audience engagement.
 - i. Slide content is required.
 - ii. No travel is required.
 - iii. TM/RM is responsible for program webinar logistics.

PEER TO PEER SPEAKER PROGRAM GENERAL GUIDANCE

These promotional programs are defined as local events at which a clinician speaker presents an educational topic to a group of other clinicians. Specific guidelines for Speaker Programs include:

- a. Under no circumstance should potential positive impacts on revenue be discussed as having any bearing on whether or not a speaking event is conducted.

- b. Audiences for speaker programs may include a speaker presenting to their own referral base. **Conversation at these programs must not include any material discussion of practice business or other non-educational content.**
- c. Speakers may not present to their own fellows.
- d. LMEP and Remote Webinar Programs can include a midlevel and other HCP attendees.
- e. All speakers MUST be selected from the ZOLL LifeVest Speaker list and the selected speaker must be from the sales area in which they will be speaking.
- f. Venues for this type of program include private rooms at restaurants, conference rooms at hotels, and hospital meeting space.
- g. Speaker programs DO NOT include any travel reimbursement for attendees.
- h. Attendee sign-in sheets and program evaluation forms are required for all programs.
- i. Roundtable educational objectives sheet must be signed by speaker and ZOLL TM/RM attendee and uploaded into the JIRA system.
- j. Attendance by a ZOLL representative is required.

The speaker program process, including speaker nomination and management and event execution is outlined later in this document.

SPEAKER MANAGEMENT

The ZOLL LifeVest speaker list is the internal list of speakers nominated by the LifeVest area sales teams and approved by the Medical Education team for use in ZOLL-sponsored speaker programs.

Speaker Recruitment

1. Speaker Nomination Process

- a. TM, RM, or AD identifies qualified speaker in their sales area
- b. TM submits speaker nomination form with current curriculum vitae (CV) to RM and AD for approval.
- c. AD submits nomination form and CV to Medical Education team for approval.
- d. Upon approval, Medical Education team sends invitation letter, contract, and W9 forms.
- e. Speaker returns contract and W9 forms and once the ZOLL officer countersigns the agreement, the physician/mid-level is activated as a speaker on the ZOLL speaker list.
- f. Speakers will not deliver any presentation until they have satisfactorily completed LifeVest education module(s). The education module(s) must be completed within thirty (30) days of signing the speaker agreement.
- g. **NOTE Speakers will NOT be available for selection in the Online Request form until they have signed their contract and completed the required speaker education modules.**

2. Speaker Nomination Guidelines

- a. Each Area will nominate speakers into the speakers list for use within their Sales Area. This nomination process will be managed by the Area Director, with the list requiring approval by the Medical Education department.
The Medical Education department will regularly send out updated speakers lists to the Area Directors.
- b. The nomination process will continue until all spaces in the speakers list are filled.
- c. Speakers will be evaluated at least annually for continued inclusion in the speakers list.
- d. The final decision on inclusion of a nominated speaker will be made by the Medical Education team after reviewing qualifications for a speaker.
- e. RM or above should meet personally with all speakers prior to nomination to ensure suitability to become a speaker.
- f. Midlevel Physician Assistants and Nurse Practitioners may be nominated for addition to the speakers list
- g. Under no circumstance should a physician's prescription writing activity be discussed as having any bearing on approval for addition into the speakers list.

3. Speaker Criteria

- a. Speakers must be at least 3 years post completion of any cardiovascular disease fellowship or 2 years post completion of a specialty fellowship and cannot be currently in any fellowship. Speakers must also be board certified.
- b. A ZOLL PSR can not become a speaker.
- c. Speakers should be clinical experts and able to engage an audience on the topic planned.
- d. A current Curriculum Vitae (CV) must accompany each nomination for a local speaker.
- e. If applicable, the speaker should first seek approval from their institution to become a member of the ZOLL Speakers List.

4. Speaker Compensation

The speaker honorarium fees for ZOLL LifeVest Peer to Peer Medical Education Programs for fully performed services will be as follows:

- a. Peer to Peer Roundtable meetings
 - i. Each roundtable meeting (maximum of one per day) -- \$750
- b. Local Medical Education Programs
 - i. If Overnight Travel is Required (typically more than 4 hours and approved by ZOLL LifeVest Medical Education):
 - First presentation per calendar day or single trip -- \$1,500 honorarium plus \$1,000 overnight travel fee, in addition to reasonable travel expenses.
 - 2nd presentation in a calendar day or single trip (if applicable) -- \$1,000
 - ii. If NO Overnight Travel is Required:
 - First presentation per calendar day or single trip -- \$1,500
 - 2nd presentation in a calendar day or single trip (if applicable) -- \$1,000
- c. Remote Peer to Peer webinar presentations
 - i. Each remote peer to peer webinar presentation -- \$1,500
- d. No speaker shall be paid, excluding expense reimbursement, a sum of more than \$4,000 for performing Services on any calendar day or single trip.

Active Speakers

1. Speaker Usage

The following guidelines apply in order to ensure that speakers in our speaker list are used effectively and appropriately and payments are kept within an appropriate range.

- a. No speaker in the speakers list may be utilized for more than 10 roundtable programs in any quarter.
- b. No speaker will be used for more than 2 overnight LMEP programs or 3 non-overnight LMEP programs in any quarter.
- c. Speakers MUST be utilized at least TWICE per year in order to be retained in the speakers list.
- d. Speakers can not be paid more than \$3,500.00 in a calendar day or single trip.
- e. Speakers can not be paid a total of more than \$30,000 in any calendar year.
- f. Speakers will be utilized only within the Sales Area from which they are nominated. Exceptions to use speakers from outside the Sales Area require coordination and approval between Area Directors, with final approval by the Medical Education team.

2. Speaker Contracts

- a. Speaker contracts will be standardized for all new speakers added to the speaker list. The duration of each contract will be 1 year.
- b. Speakers will be required to complete a W9 form as part of their speaker contract.
- c. All Speakers will be paid after each speaking engagement upon receipt of sign-in sheets and evaluation forms and checks will be mailed to the address indicated on their speaking contracts.

3. Speaker Contract Renewal Process.

- a. Speakers that have not responded to their speaker invitation letter within one month of the invitation being extended will automatically be removed from the speakers list.
- b. Speakers that were not utilized TWICE over the course of one (1) year will automatically be removed from the speakers list.
- c. Speakers that are removed due to not returning a contract or not being utilized over the course of a year will be put on a "ineligible" list for one (1) year.
- d. Speakers that have been utilized over the course of one (1) year will be eligible for renewal. Renewal of current eligible speakers will be at the discretion of the Area Directors.

4. Speaker Travel/Expenses

- a. Speakers may book travel through their preferred travel services or, they may utilize Carlson Wagonlit Travel (CWT). Reference Speaker Travel Quick Reference Guide when booking travel.
- b. Speakers will be reimbursed for reasonable travel and expenses associated with delivering their presentation. Receipts can be emailed or faxed to the Medical Education team for reimbursement. Speaker meal expenses will not count towards their \$300.00/yr limit. Speakers must be properly categorized in the Concur expense reporting tool to ensure proper tracking of the meal expense and to avoid errors in speaker expense reporting. Speaker expenses are reimbursed through the Medical Education budget and any attendee meal expenses are reimbursed through the particular sales region's budget.

5. Speaker Slide Decks

- a. Powerpoint versions of speaker slide decks will be sent to speakers regularly. Slide decks can also be sent upon a speaker's request or upon request by the TM planning the program.
- b. A PDF version of the speaker slide deck is available on the LVN for use by TMs in preparing speakers for the presentation.
- c. The speaker slide deck contains both promotional as well as Independent Medical material and cannot be used in a promotional manner at any time due to the possible ramification of not being able to use Independent Medical Education in the future.
- d. All speakers must view LifeVest education module(s) within the first 30 days of their initial or renewal contract and before the first speaking engagement.
- e. While TMs are expected to help train speakers in preparing for a presentation, the ultimate responsibility to prepare and deliver the presentation lies with the speaker.

SPEAKER PROGRAM EVENT MANAGEMENT

The process for scheduling ZOLL-sponsored LMEPs is outlined below.

NOTE: All information and forms are located on the LifeVest Network at the following path: Shared Sales Documents / USA Sales Documents / Local Med Ed Programs

1. **Pre-event**

- Identify an educational need – determine that an educational need exists in your territory.
- Determine which speaker from your Sales Area LMEP speakers list would be able to deliver the talk. Work with your Regional Manager and Area Director on picking a particular speaker to ensure that the speaker is available.
- All program requests will be submitted online by using the direct URL link : lifestest.zoll.com/LMEP.
 - An email notification will be sent upon successful online program request submission.
 - Once the online program request form is successfully submitted, the requestor can no longer edit the electronic form. Any program changes should be requested in the comment box of the online program ticket. The Medical Education Administrator will log any program changes in the corresponding online program ticket.
 - The following reviews and approvals occur for all program requests:
 - The Medical Education administrator first reviews the request before advancing to the RM/AD approval phase.
 - Regional Manager approves or denies the request.
 - Area Director approves or denies the request. NOTE: if requesting a speaker from outside your sales area, a second AD approval is required
 - After Regional Manager and Area Director approvals are granted, the Medical Education Administrator grants final approval and an email is sent to the requestor to inform.
- Notify the Medical Education Team through your RM/AD if you are doing a joint speaking event with another company.
- Once approved, invite your selected speaker and coordinate a date for your program with both the speaker and your audience. [NOTE: The Medical Education team does NOT contact approved speakers or make any arrangements with speakers for planned speaker programs.]
- Coordinate with your selected speaker to ensure that travel arrangements are made as

appropriate.

- Secure a venue for the program. If a meal is involved, ensure your spending conforms to existing corporate customer entertainment policies.
- Ensure your target audience is invited – create an invitation utilizing the template provided to distribute within your territory.
- Prepare sign-in sheets for all attendees.
- Make sure any audio-visual requirements are arranged in advance, including projectors, microphones, etc. as required.
- Re-submit program online request form if your event changes dates. This will also require RM and AD approval prior to review by the Medical Education team).

2. During the event

- Arrive early to your venue to ensure that everything is prepared for your program. Make sure audiovisual is functioning properly.
- Ensure each attendee signs in to document attendance.
- Ensure you complete a speaker evaluation form for the program.

3. After the event

- File your expense report with the attendee list attached for any applicable meals, etc.
- Ensure all roundtable educational objective forms are signed and submitted in the online system.
- Attach your attendee sign-in sheets and speaker evaluation forms to the corresponding online program ticket. Attendee sign-in sheets MUST be printed and signed by each attendee and each attendee must complete a speaker evaluation form. Sign-in sheets that do not contain attendee signatures will not be accepted.
- Payment to speakers will be delayed if sign-in sheets and evaluation forms are not submitted in a timely manner. No payment will be made without these forms submitted.
- Provide feedback about any aspect of the program to the Medical Education team.

Questions

If you have any questions about Peer to Peer Speaker Programs, please contact the Medical Education team.

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