

From NOVARTIS' Speech for *Elidel* Product Launch, March 2002

Marketing Overview/Treatment Options

Day 2 PM General Session – Focus: The Market

20 minutes

After musical number "Talkin' Trash" there is a Voice Over introduction of speaker

Thank you.

(referring to dance number)

Wasn't that great?

(slight pause)

Too bad we can't detail the physicians with that number.

(slight pause for laughter)

This afternoon's General Session Focus is on The Market. Elidel's place in the expanding eczema market. And I think the ending to that number sums it up:

"THIS IS MY COURT NOW."

This is our court now. Elidel is about to enter the game, so move on over Protopic.



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And not just Protopic—it's time to bench some of the corticosteroid players, too; because it's an entirely new game now.

[interim text deleted]

Corticosteroids are sort of the Michael Jordan of the game.

(slight pause)

—they're a powerful presence on the court, but they're getting old—and they refuse to retire.

(pause for laughter)

And like some star athletes we won't mention, corticosteroids have a dark side.

SLIDE entitled Limitations to Chronic Topical Corticosteroid Therapy

- Skin side effects.
- Tachyphylaxis.
- HPA-axis suppression.
- Cushing syndrome and potential growth retardation.
- Risk of cataract and glaucoma.

Of the huge number of branded and generic players on the court, one claims to be



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different. Let's put the spotlight on Elocon and see if it lives up to its self-proclaimed reputation.

One thing is indisputable: with 12% of total prescription volume in 2001, Elocon is the #1 branded corticosteroid in the eczema market today.

This corticosteroid's claim to fame is that it needs only once-a-day application—and it has comparable improvements relative to other mid-potency corticosteroids.

But buyer beware. Patients are warned not to use the product continuously for more than two weeks.

While Elocon may have comparable improvements, it also has comparable side affects:

Referring to above slide:

Skin atrophy. Tachyphylaxis. HPA-axis suppression...and so on.

Lastly, there is Elocon's limited label: moderate to severe.

Remember that 93% of the market is mild to moderate.

And what about the new kid on the block?



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Protopic came into the game posturing—we saw that in the musical number—as the “slam dunk” of eczema treatments.

And it actually makes a claim that a lot of athletes wish they could make:

(slight pause)

“I don’t use steroids.”

(pause for laughter)

It’s true: Protopic does not cause skin atrophy, striations or vascular constriction.

But what about complaints of stinging and burning?

Well, that’s not surprising when you consider that patients are slathering their skin with a topical version of a very potent immunosuppressant, a powerful medication used in organ transplants.

Like Elocon, Protopic’s label is for moderate to severe symptoms.

Did I say that 93% of the market is mild to moderate?

(pause for laughter)



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I mentioned earlier that Protopic spends very little on promotion and that they have only about 50 reps in the field.

Now take a look at our guns.

SLIDE entitled Novartis Dominates Detailing in Derm Offices.

Rumor has it that Protopic may add on another 100 reps next month. Even if they do, we will still outnumber them almost 7 to one.

In sampling and promotion spending alone, we are going to blow them off the court.

But your physician is not interested in market figures. He wants to know how Elidel can help his patients.

Of course, the very first thing you'll tell him is that Elidel has no steroids. You are going to be saying that over and over, so let's practice here. Everybody say, "No steroids!"

(wait for audience to respond, then:)

I can't hear you. One more time: "No steroids!"

(wait as they respond, then pause a beat:)

I think you can skip the sales training tomorrow. You've got half the detail down.



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