THE KINETIX GROUP

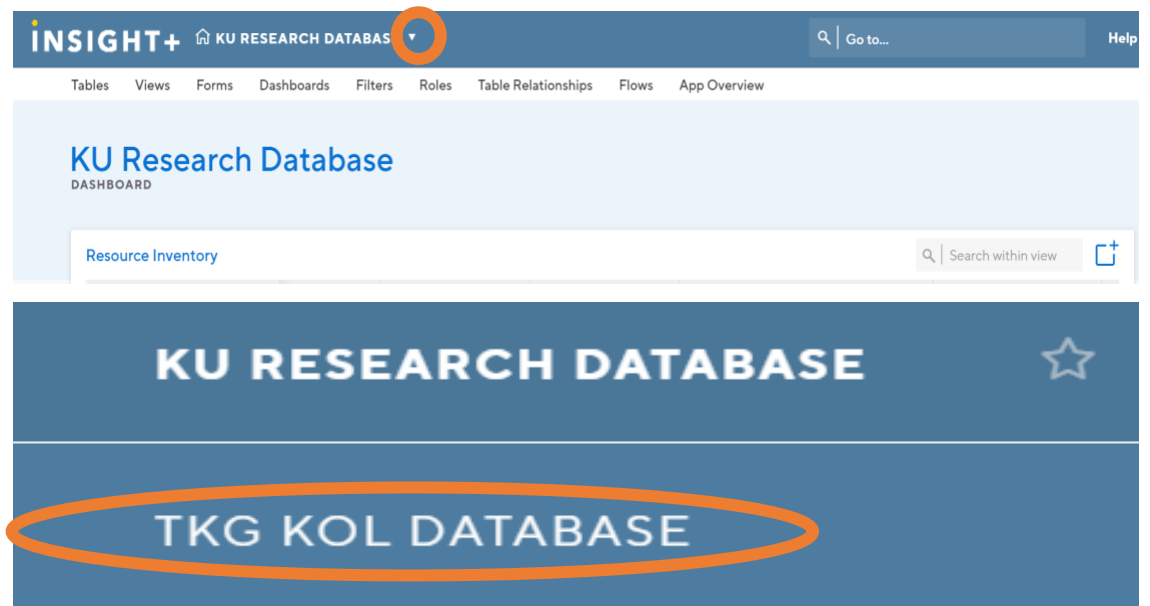# Utilizing the KOL Database

Contacting a KOL from the KOL Database

1. Log-in to the [TrackVia] [https://go.trackvia.com/] application (this will change once we identify champions on each of the teams)
   a. Your username will be your TKG Email, you will set your password.
2. Open KOL database
   a.

   b.
   c.

3. Locate KOL(s) you are interested in contacting for your project
   a. Columns *Current Organization, Expertise, Clinical Specialty, Employment Setting, Region, State, Documents on File, Strength of Relationship,*

Willingness to Contact Directly with Life Sciences are all discrete fields and may be the best to filter down your options

b. Filter individual fields or type keywords into the search bar to show KOLs who meet specific parameters

c. Click export view to have that view exported to excel

d. <u>filter</u>, <u>sort</u>, <u>search,</u> and <u>export</u>
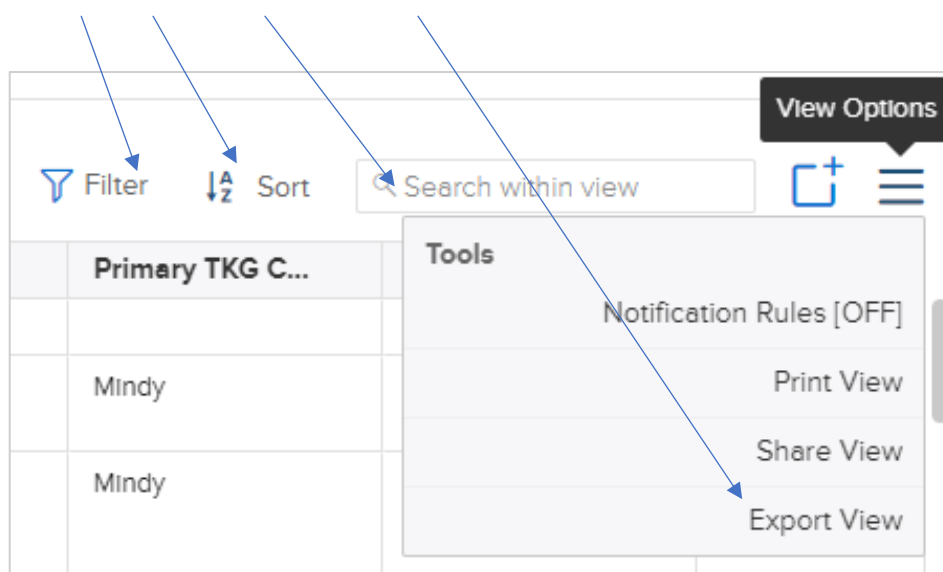
4. When you find KOLs you are interested in engaging - contact the primary TKG contact(s) for desired KOL(s) regarding availability and appropriateness for task at hand and to align on outreach plan, such as:

a. *Primary contact outreaches to KOL on your behalf* and copies you into the email

b. *You outreach to the KOL* and copy in the primary contact

Adding a New KOL to the Database

1. Complete the form under the "Add a KOL" tab within TrackVia

a.

  b. *Please only add KOLs to the database if you would feel comfortable reaching out to them*

2. All required fields must be completed, including:
  a. First Name
  b. Last Name
  c. Title (role in the organization)
  d. Current Organization
  e. Employment Setting
  f. Client Work
  g. State
  h. Use the CMS regional alignment:
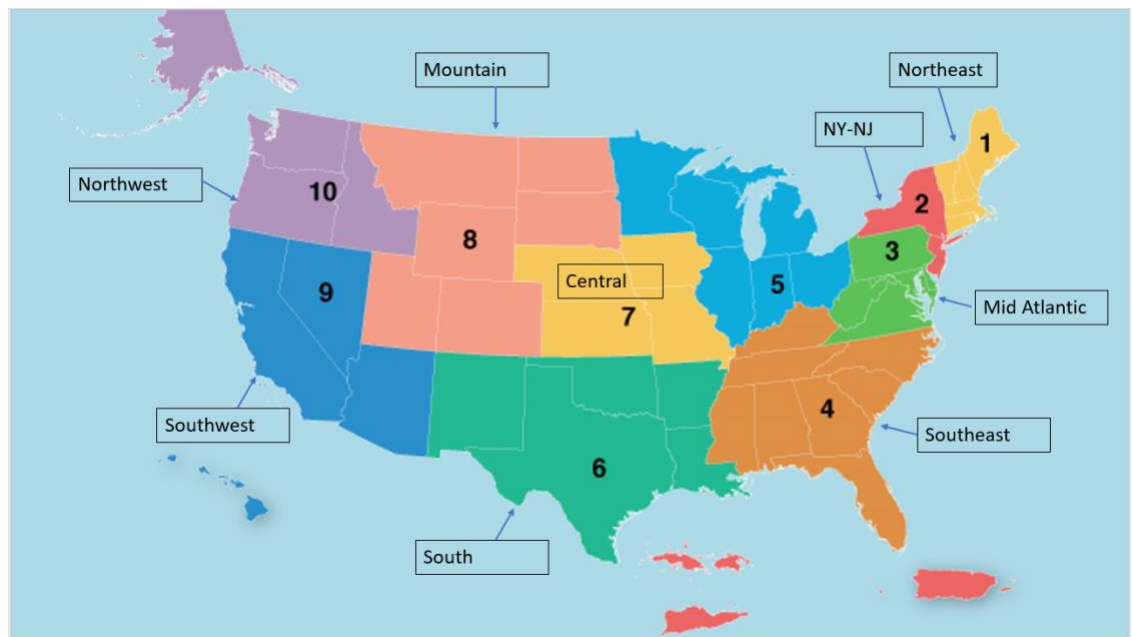
  i.
  j. Primary TKG Contact Name (*may be your name*)
  k. Strength of Relationship
  l. Email
  m. Although these are the required fields please fill out as many fields as possible for record keeping purposes and so colleagues know the how and when to engage the new KOL

3. Follow-up with Eric Mitchell if:
  a. The option you are looking for isn't available in the multiple-choice fields

b. Your entry has not been added in a reasonable amount of time

Adding Advisor Documents

1. When adding a new KOL to the database, you may have already had them complete a W-9, NDA, advisor agreement or received their CV
   a. This also applies if an existing KOL completes updated documents
2. In this situation, please indicate which documents are on file when completing the new KOL submission form
3. Next, make sure these documents are available to everyone on DropBox
   a. Go to the KOL Documents on File master folder
   b. Create a new folder with the name of the KOL (or to an existing folder if KOL is already listed)
   c. Place all advisor documents in the folder

Edit an Entry in the KOL Database

1. Log-in to TrackVia application
2. Locate the KOL you would like to update
3. Double click on the cell you would like to change (like in excel) or choose from the drop down if a discrete field
   a. If appropriate option is not available in a discrete field, please contact Eric Mitchell

Deleting a KOL from the Database

1. You receive an email indicating a KOL would no longer like to be contacted by TKG
2. Speak with the KOL primary contact regarding the situation

3. If the KOL would like to receive no more communication from TKG, email Eric Mitchell to delete the entry from the TrackVia database