



Name: _____

Date: _____

Think about the last detailing visit you had and briefly evaluate yourself on each element listed below.

ELEMENTS OF A VISIT	(1) NEEDS IMPROVEMENT	(2) PROFICIENT	(3) EXCELLENT
INTRODUCTION			
Effectively reviewed role, purpose, and value of the visit			
Recognized nonverbal communication			
Built trust			
Responded well to the mood of the clinician			
Optional Notes/Reflections: 			



ELEMENTS OF A VISIT	(1) NEEDS IMPROVEMENT	(2) PROFICIENT	(3) EXCELLENT
NEEDS ASSESSMENT			
Elicited educational opportunities and uncovered prescriber needs/utilized open ended questions			
Exhibited empathy			
Optional Notes/Reflections:			
KEY MESSAGES			
Delivered key messages with impact (e.g., did the clinician understand at least one key message?)			
Utilized materials to support key messages			
Optional Notes/Reflections:			



ELEMENTS OF A VISIT	(1) NEEDS IMPROVEMENT	(2) PROFICIENT	(3) EXCELLENT
FEATURES AND BENEFITS			
Conveyed evidence			
Met identified clinician needs			
Optional Notes/Reflections:			
BARRIERS AND ENABLERS			
Identified obstacles			
Provided solutions and path forward			
Offered follow up			
Optional Notes/Reflections:			



ELEMENTS OF A VISIT	(1) NEEDS IMPROVEMENT	(2) PROFICIENT	(3) EXCELLENT
OBJECTIONS			
Clarified objections			
Conveyed respect			
Negotiated possible solutions			
Optional Notes/Reflections:			
SUMMARY AND CLOSE			
Reviewed key messages discussed			
Gained commitment for action			
Secured a future visit			
Optional Notes/Reflections:			