

Making the
Most of Your
Team: Training
Staff for Success

Today's Presenters:

Sandeep (Sonny) Singh Bains, PharmD, BCPS

Clinical Educator, Alosa Health

Tony de Melo, RPh

Director of Clinical Education Programs, Alosa Health



Presenter Disclosures

Tony de Melo, RPh and Sonny Bains, PharmD, BCPS

- No financial relationships or conflicts of interest to disclose

Today's Breakout Session Agenda

1:15pm – 1:40pm ET: Welcome and Level Setting

1:40pm – 1:55pm ET: Breakout Groups Round 1

1:55pm – 2:05pm ET: Large Group Discussion

2:05pm – 2:20pm ET: Breakout Groups Round 2

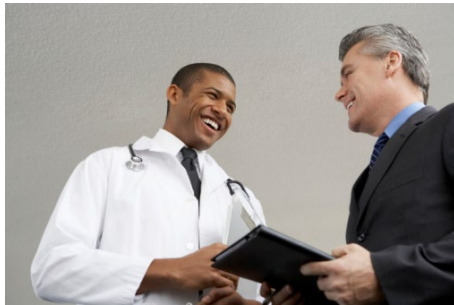
2:20pm – 2:30pm ET: Large Group Discussion

2:30pm – 2:45pm ET: Questions and Wrap-up



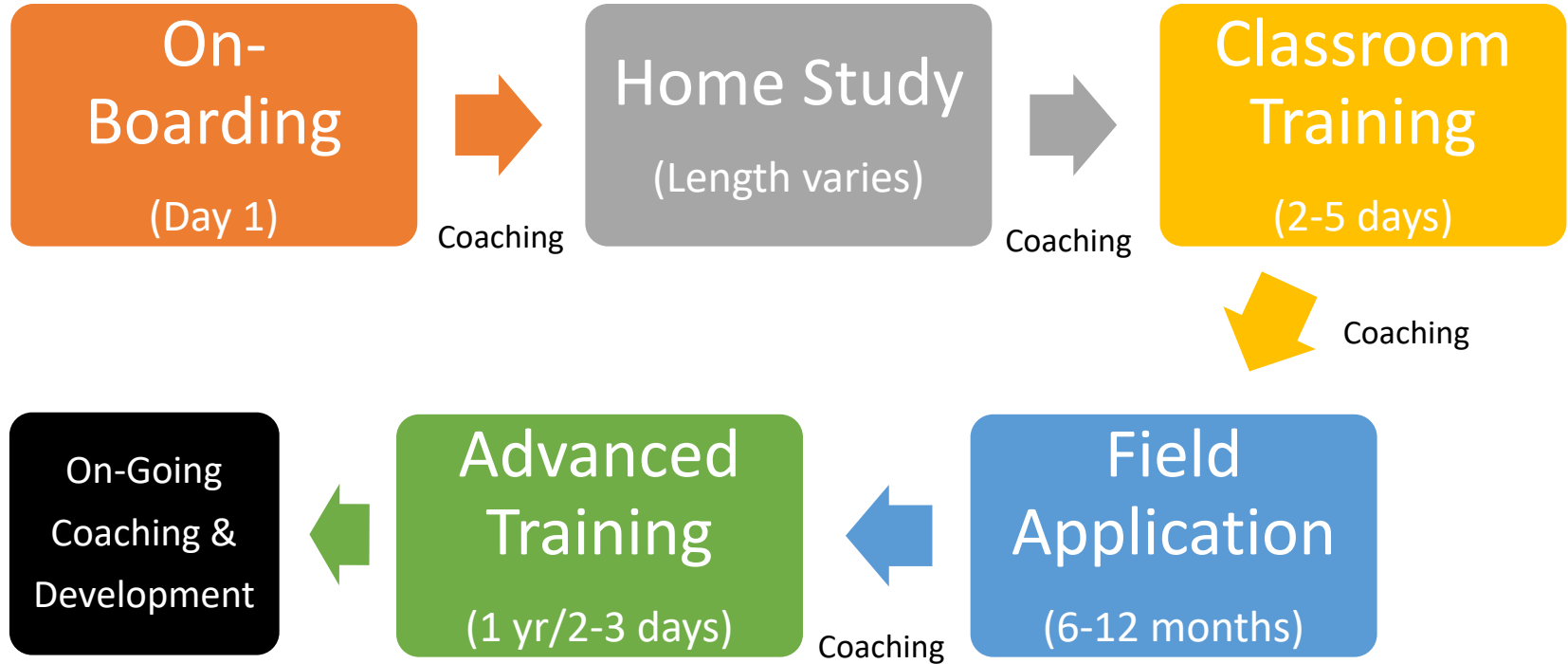
Alosa Health – Who We Are

Nonprofit organization that is a national leader in developing programs that provide health care professionals with **unbiased, non-commercial information** on the best ways to manage clinical problems



Established in 2004, we provide educational outreach services – **“academic detailing”** – that offer the latest information from the medical literature to help improve patient outcomes

Phases of training



Training concepts and content

Home Study

- Disease state
- Product knowledge
- Literature
- Materials
- Reporting system
- Admin work

Classroom Training

- Enhanced disease knowledge
- Basics of academic detailing
- Structure of a visit
- Using materials effectively
- Role-playing
- Evaluation and feedback

Advance Training Class


- Strategic planning
- Personal communication style
- AD skills development
- Motivational interviewing techniques
- Managing provider objections
- Enhanced disease

Coaching and feedback

- Video record and provide feedback during role-playing
 - Standardized assessment tool (rubric) for role-playing
- Perform virtual and in-person field visits for continuing development
 - Field Coaching Report to document



Alosa Health Practice Detail Rubric			
Detailer Name: _____ Observer: _____ Date: _____			
Elements of a Visit	(1) Needs Improvement	(2) Needs Expectations	(3) Excellent
Introduction <ul style="list-style-type: none">- Effectively reviews role and purpose of visit<ul style="list-style-type: none">o Summarized last visit and asked about experiences and progress made- Recipients demonstrated communication & builds trust			
Needs Assessment: <ul style="list-style-type: none">- Utilizes open-ended questions to uncover provider needs and educational opportunities- Exhibits empathy			
Features and Benefits: <ul style="list-style-type: none">- Gives evidence- Describe what's in it for the provider (WIIFM)			
Key Messages: <ul style="list-style-type: none">- Delivers key messages with impact & focuses on identified needs- Utilizes materials effectively & presents them effectively (virtually)			
Barriers and Enablers: <ul style="list-style-type: none">- Identifies obstacles & provides solutions and path forward- Offers follow-up			
Objectives: <ul style="list-style-type: none">- Clarifies objectives- Negotiates solutions			
Summary and Close: <ul style="list-style-type: none">- Reviews key messages- Gains commitment for action/behavior change- Plans for follow-up.			
Overall Review of Detail Visit	(1) Needs Improvement	(2) Needs Expectations	(3) Excellent
The detailer's body language, tone, and eye contact (virtual presentation) seemed appropriate.			
The provider seemed engaged			
Overall, the encounter embodied the elements of a successful AD visit			
To the best of your judgment, this detail session resulted in building/maintaining a positive relationship with the clinician	Unlikely 1	Likely 2	Extremely Likely 3
To the best of your judgment, this detail session will result in a change in behavior	Unlikely 1	Likely 2	Extremely Likely 3
Comments:			
Total Score <input type="text"/>			

 **Field Coaching Report**

To: _____
From: Tony de Melo
Date: _____

XXX, thanks for letting me work with you yesterday. It was good to see how you are doing and how you are making progress in your territory.

Field Visit Comments
While working with you, you were able to show me how you divided up your doctor list and the progress you have been making getting around to seeing providers. You seem to have Salesforce down and can complete visits and appointments successfully. We discussed working on your routing and sticking to it, so that you schedule appointments in the correct weeks moving forward.

I was able to observe how you are interacting with the office staff and providers you are visiting. The two appointments we had were very good. You seem to know your materials well and can detail effectively. We discussed trying to be a bit more conversational by just asking more questions and spending more time on the needs analysis. The more you ask questions and find out what the provider is currently doing and thinking the more you can focus on what you actually need to cover. This might identify that you don't have to cover as much as you originally thought.

In writing call notes, we discussed, writing more content down on what you learned during the visits. This will serve to remind you of what you learned for next time. This was you don't have to repeat things and you will know what to focus on in subsequent visits. Also, try to write down more of what you covered during each visit, so you know what you did. Also, don't forget to get a commitment from the providers and follow-up to ensure they are doing what they committed to. Try to always start your subsequent visits to confirm they are doing what they said they would before you move on to new content.

Observations

Strengths:

- Preparation for each day and visit
- Salesforce data entry and submission

Areas to Develop:

- Creating a territory routing plan/schedule
 - o This will help you navigate the territory more effectively and keep you on a consistent schedule.
- Writing more effective visit notes
 - o As discussed above, just write down more of what you learned as part of your needs analysis, what your actions were and content you covered, then any commitments you received and finally what you are going to follow-up on.

149 Baylton Street, 6th Floor • Boston, MA 02116 • 617-948-8597 • www.alosahealth.com

Alosa Health Practice Detail Rubric

Detailer Name: _____ Observer: _____ Date: _____

Elements of a Visit	(1) Needs Improvement	(2) Meets Expectations	(3) Excellent
Introduction: - Effectively reviews role and purpose of visit o Summarized last visit and asked about experiences and progress made - Recognizes nonverbal communication & builds trust			
Needs Assessment: - Utilizes open ended questions to uncover prescriber needs and educational opportunities - Exhibits empathy			
Features and Benefits: - Conveys evidence - Describes what's in it for the provider (WIIFM)			
Key Messages: - Delivers key messages with impact & focuses on identified needs - Utilizes materials effectively & presents them effectively (virtually)			
Barriers and Enablers: - Identifies obstacles & provides solutions and path forward - Offers follow up			
Objections: - Clarifies objections - Negotiates solutions			
Summary and Close: - Reviews key messages - Gains commitment for action/behavior change - Plans for follow-up			

Overall Review of Detail Visit	(1) Needs Improvement	(2) Meets Expectations	(3) Excellent
The detailer's body language, tone, and eye contact (virtual presentation) seemed appropriate			
The provider seemed engaged			
Overall, the encounter embodied the elements of a successful AD visit			
To the best of your judgment, this detail session resulted in building/maintaining a positive relationship with the clinician	Unlikely 1	Likely 2	Extremely Likely 3
To the best of your judgment, this detail session will result in a change in behavior	Unlikely 1	Likely 2	Extremely Likely 3
Comments:			

Field Coaching Report

To:

From: Tony de Melo

Date:

XXX, thanks for letting me work with you yesterday. It was good to see how you are doing and how you are making progress in your territory.

Field Visit Comments

While working with you, you were able to show me how you divided up your doctor list and the progress you have been making getting around to seeing providers. You seem to have Salesforce down and can complete visits and bimonthlies successfully. We discussed working on your routing and sticking to it, so that you schedule appointments in the correct weeks moving forward.

I was able to observe how you are interacting with the office staff and providers you are visiting. The two appointments we had were very good. You seem to know your materials well and can detail effectively. We discussed trying to be a bit more conversational by just asking more questions and spending more time on the needs analysis. The more you ask questions and find out what the provider is currently doing and thinking the more you can focus on what you actually need to cover. This might identify that you don't have to cover as much as you originally thought.

In writing call notes, we discussed, writing more content down on what you learned during the visits. This will serve to remind you of what you learned for next time. This was you don't have to repeat things and you will know what to focus on in subsequent visits. Also, try to write down more of what you covered during each visit, so you know what you did. Also, don't forget to get a commitment from the providers and follow-up to ensure they are doing what they committed to. Try to always start your subsequent visits to confirm they are doing what they said they would before you move on to new content.

Observations

Strengths:

- Preparation for each day and visit
- Salesforce data entry and submission

Areas to Develop:

- Creating a territory routing plan/schedule
 - This will help you navigate the territory more effectively and keep you on a consistent schedule.
- Writing more effective visit notes
 - As discussed above, just write down more of what you learned as part of your needs analysis, what your actions were and content you covered, then any commitments you received and finally what you are going to follow-up on.

Peer-to-peer learning

- Assign mentors to new detailers
 - Serve as a sounding board and provide assistance
 - Go on field visits to offer suggestion

Team meetings

- **Brainstorming sessions** with team (overcoming challenges, sharing successes, etc.)
- **Outreach planning** meetings for gaining access
- Utilize **subject matter experts** to present updates and new concepts

Breakouts Round 1



We'll see you in 15 minutes



Remember

- Turn your video on for the breakout session if you're able to
- Request help from the host if you need assistance from the NaRCAD team
- Have fun!

Discussion Question



*How do you continuously coach
or support your detailers?*

Large Group Discussion & Sharing



Breakouts Round 2



We'll see you in 15 minutes



Remember

- Turn your video on for the breakout session if you're able to
- Request help from the host if you need assistance from the NaRCAD team
- Have fun!

How do you keep your team up to date on the latest evidence, changing guidelines/standards and local available resources?

Discussion Question

Large Group Discussion & Sharing





**Please rejoin the main room now
by clicking on the link in the chatbox.**