



# **NARCAD2023 LIVESTREAM BREAKOUT SESSION:**

*"The First Step:*

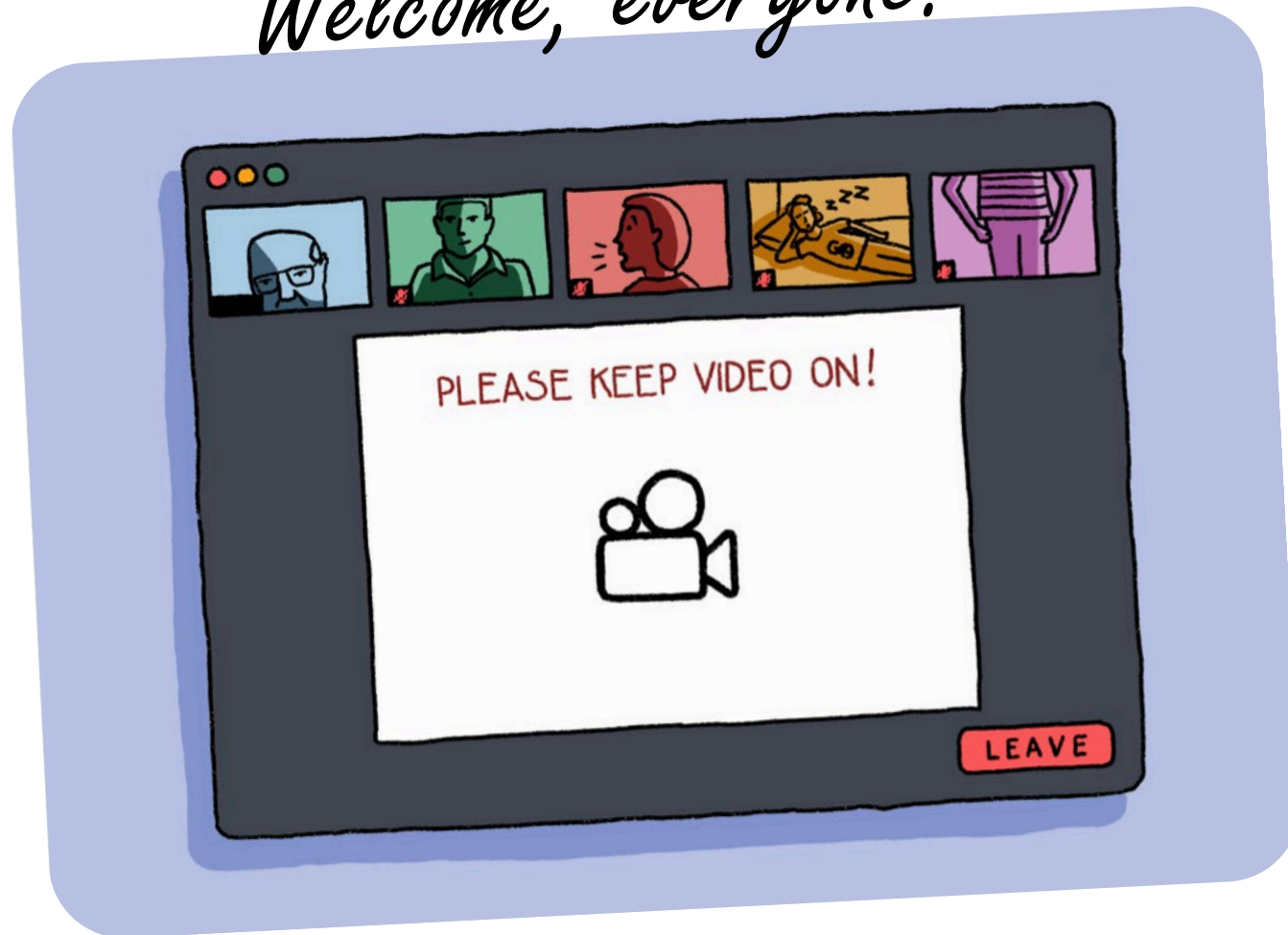
*Strengthening Your Ability to Schedule Visits with Clinicians"*

**Tuesday, November 7, 2023, 10:30am-12pm ET**

National Resource Center for Academic Detailing  
Boston Medical Center



*Welcome, everyone!*



# Today's Objectives

**The importance of building new relationships**

**Strategies & examples of approaches**

**Reflections on best practices**

**Building peer solutions for a 'gaining access case study'**

**Next steps & connection to resources**

# Today's Agenda

**Introduction** (20-25 minutes)

**Breakout 1** (15 minutes)

**Large Group Discussion** (15 minutes)

**Breakout 2** (15 minutes)

**Large Group Discussion** (15 minutes)

**Wrap-up** (5 minutes)

# Disclosure Statement



No conflicts of interest



No financial or non-financial  
relationships of concern

## TODAY'S FACILITATORS:



**Lexie Hach, MA**

Disease Intervention Specialist and Special Projects Coordinator  
Iowa Department of Health and Human Services  
Division of Public Health  
Bureau of HIV, STI, and Hepatitis Capacity Extension Program



**Loren Regier, BSP, BA**

Consultant Pharmacist  
Founder, former Director  
RxFiles Academic Detailing

# Lexie's Program Overview

- **Iowa HHS, Bureau of HIV, STI, and Hepatitis Academic Detailing Program**

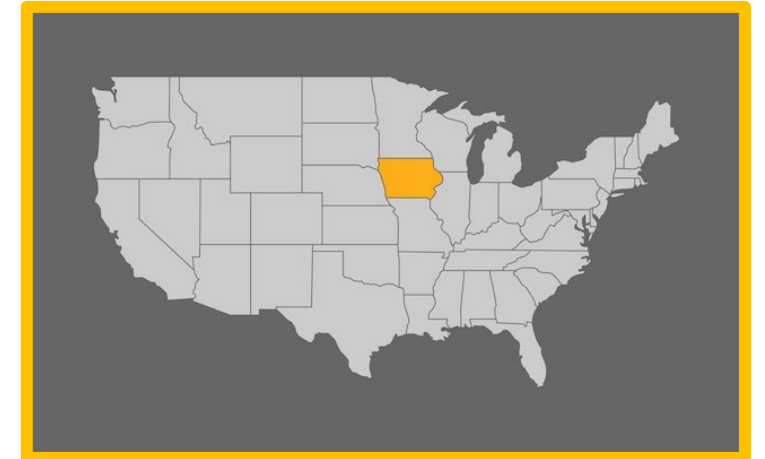
- 2016-Present
- Iowa, United States
- Regional Health Specialists (RHS)=Academic Detailers (5)

- **History:**

- 2016-Program Development Began (Co-lead)
  - Program focused on rural providers
- 2019-Expanded to include urban areas
- 2020-Present adapted to virtual formats, hybrid, and in-person

- **Program Focus:**

- Clinicians (Primary Care), Mental Health, Substance Use, Corrections, Public Health and Community-Based Stakeholders
- Subject Focus: HIV, STIs, and Hepatitis



# Loren's Program Overview

- RxFiles Academic Detailing Service: 1997-present

- Saskatchewan, Canada
- History
  - 1997: Pilot in Saskatoon (Program Lead)
  - 2000: Expansion to Province (Academic Detailer, Director, Consultant)
- Scope as it relates to getting in the door
  - Primary care (urban/rural; health region/university; established/new clinicians)
  - 300-400 providers per topic; 2+ topics per year; plus additional educational outreach



- Other Academic Detailing Involvement

- Canadian Academic Detailing Collaboration (CADC)
- Centre for Effective Practice – Academic Detailing Service (Ontario): 2015-2021
  - Served as Clinical Director for initial pilot and subsequent establishment of AD Service



# Gaining Access: Defining Success

*It's not always about getting the 1:1 visit;  
a "maybe" is still a win! You're beginning to build relationships.*



# *Type in the Chatbox*

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Chat waterfall about gaining access?  
Something about understanding  
gatekeepers' jobs and how not to see  
them as adversaries?



# Type in the Chatbox:

Which strategies have you utilized to gain access to clinics and/or providers?  
(Type all that apply.)

- A. Cold Calls by Phone**
- B. Showing up in person**
- C. Emails**
- D. Letters/Flyers**
- E. Scheduling Applications & Platforms**
- F. Champions & Referrals**
- G. Incentives** *(if there's a budget/approval)*
- H. Other** *(Tell us what!)*
- I. Not sure/haven't started**



# Best Practices

## • Lexie's Top 3 Tips:

1. Understand the Agency
2. Creative ways to make connections
3. Name Drop

Honorable mentions 😊

- Approach with appreciation
- Direct yet kind
- Patience goes a long way

## • Loren's Top 3 Tips:

1. Practical Networking
2. The Smaller Ask
3. An ounce of buzz words with a pound of sincerity and goodwill

Honorable mentions 😊

- hard working with fun
- assertive with grace and patience
- confidence with humility

# Preparation for Gaining Access



- Value of a first impression
- Awareness of new information
- Organizational preparation
- Utilizing connections
- Understanding of workflows and systems

# The First Relationship You Build

- First line staff are not your barriers to access or gatekeepers
- They're your first conversation with a potential new connection to the clinic
- Consider first impressions




# Letters & Flyers

“We also used [...] listservs so that we could **contact multiple clinicians at once**. We worked with the Utah Department of Health [to disseminate] a **flyer** we created about our program.”

“[This approach] brought in a lot of clinicians for detailing visits and helped us spread the word.”

**- Kelsey Genovesse, PA-C, MPAS**

*Public Health Detailer and Clinician, AIDS Education Training Center (AETC), University of Utah Infectious Disease*



## PUBLIC HEALTH DETAILING FOR 2021

**Educational outreach for medical providers to help support the tireless dedication you have to Utah's patients and community.**

**The focus of this program is to increase providers use of evidence-based medicine recommendations for STI care, nPEP and PrEP to ultimately improve our communities' health.**


**CONSULTATIONS CAN COVER:**

- » Thorough sexual health history training
- » Reviewing newest guidelines for testing and treating STIs
- » Determine frequency of screening needed
- » Individual training for nPEP and PrEP
- » How to implement PrEP visits into your practice without causing additional burden


**VISITS ARE:**

- » Virtual with hope for in person training in the future
- » Set for 15 minutes
- » Offered six days a week, as many times as you want
- » One on One so providers can have individual and customized information!
- » **FREE!**

**Contact our Public Health Detailer today for your first visit! →**



Kelsey Genovesse MPAS, PA-C  
Public Health Detailer with AETC  
University of Utah Health  
[kelsey.genovesse@hsc.utah.edu](mailto:kelsey.genovesse@hsc.utah.edu)  
801-585-2547



# Lexie-RHS Newsletter

Public Health  
IOWA HHS



From the desk of Alicia Mercado,  
your Region 2 Regional Health Equity Specialist



**Serving:**

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The Regional Health Specialist newsletter is a monthly update for all community partners. In each newsletter, you'll find updates pertaining to HIV, STIs, and hepatitis C in Iowa, plus other topics of interest. For suggestions on content, please don't hesitate to reach out!

## In this issue:

- Hepatitis C Elimination Planning: Join Us for a Regional Meeting!
- Celebrating Let's Talk Month with Eyes Open Iowa
- Sept. 15—National Latinx HIV/AIDS Awareness Day
- Domestic Violence Awareness Month
- National Disease Intervention Specialist (DIS) Recognition Day
- Ask Me Anything About HIV/STDs with Dr. Demetre Daskalakis
- Training and Webinar Opportunities

*Did you miss a previous newsletter? Catch up now!*

[September 2023](#) | [August 2023](#) | [July 2023](#)

**Alicia Mercado** | Regional Health Equity Specialist

Bureau of HIV, STI, & Hepatitis | NuCara\* Capacity Extension Program  
Division of Public Health | Iowa Department of Health and Human Services  
Mobile: 515-322-7081 | [alicia.mercado@idph.iowa.gov](mailto:alicia.mercado@idph.iowa.gov)

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# Cold Calls & Emails

- **Introductions, in any format should:**
  - be succinct
  - include the most relevant information
  - illustrates why your visit is important
  - (It's an “elevator pitch!”)
- **Use a standard base format for communications:**
  - Limit the amount of text—less is more!
  - Personalize it to specific recipients' backgrounds
  - Easy for readers to review and see an **action item**/step quickly.

# Examples of an email script

## First Email:

Hi Julie,

My name is Lexie Hach and I am with the Iowa HHS **Academic Detailing Program. Which means I provide educational outreach to clinicians related to HIV, STI, and Hepatitis.**

I met **Dr. Smith last week** at the Iowa Primary Care Conference and he suggested I contact you regarding PrEP education for clinicians.

## When would be a good time to meet with you to discuss?

- 15 minute block of time (phone, virtual, in-person)
- 30-45 minute block of time (phone, virtual, in-person)

Feel free to respond to this email or give me a call at the number listed below. I look forward to hearing from you and appreciate any consideration!

Best,

Lexie Hach

## Re: our new RxFiles' topic: **Menopause**

Our team has been diving into the **evidence, common questions, and controversies** that surround menopausal drug therapy options.

I am now **booking office visits** to discuss aspects of the topic of interest & importance to you and your patients. (For more info see attached.)

## **Would I be able to book a time to discuss?**

- option for:
  - short ~15 minute sessions, or
  - longer ~30-45 minute sessions
  - accreditation through CFPC (mainpro 1)

You can reply by email/or call my cell, or...

If I don't hear from you, I'll follow up next week.

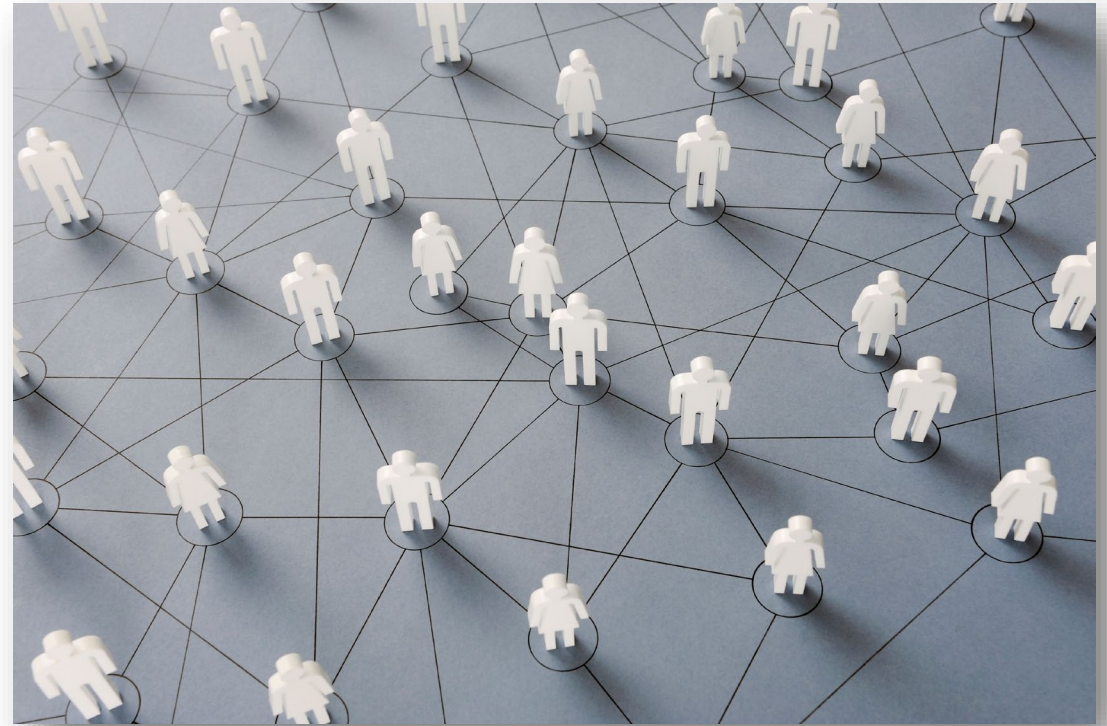
Thank you for considering!!!

# Leveraging Pre-existing Relationships: Champions & Referrals

- Don't be afraid to be direct.
- You share goals for patient care and it's part of your job to connect with clinicians.
- You're building a network of connections!

## Examples

- Sharing who you've already met with (*name-dropping*)
- Asking for direct connections and introductions from leadership
- Consider networking events



# Scheduling Applications

“ [The **Appointlet** scheduling app] allows us to manage all of our detailers’ schedules in a centralized place. It’s extremely **intuitive** and **easy to use.**”

– **Ashley Allison**, Lead Training Coordinator,  
Oregon AIDS Education and Training Center (AETC)

 Appointlet Calendly

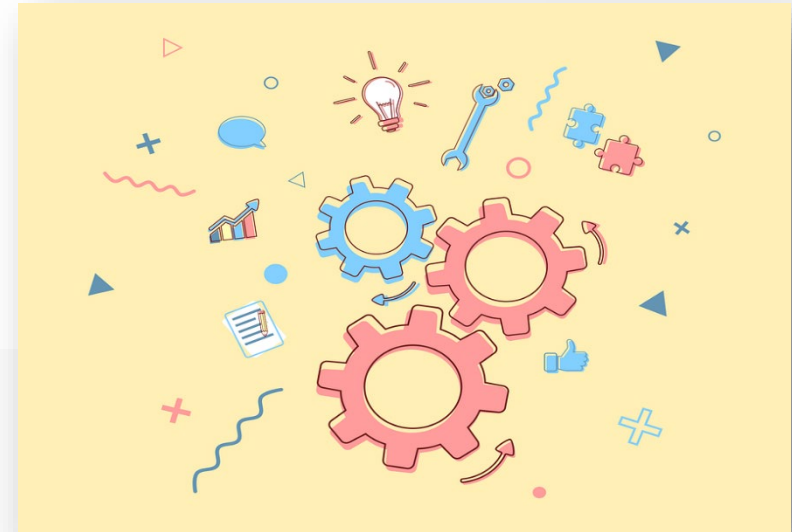
# Remember: “Small” Wins = Big Wins

- Any step forward is the beginning of building the relationship.
- The relationship is the most important component of detailing!



# Breakout Groups: Workshopping Potential Challenges and Solutions

- Peer-to-peer **sharing**
- **Encourage** others to share ideas
- Having trouble **starting the conversation**? Have everyone introduce themselves/speak in alphabetical order!



# Breakouts Round 1



# Discussion Questions

1. **Introduce** yourself and your AD program goals.
2. What are you **most worried about** when trying to gain access to clinics in your community? Why?





*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!

# *Large Group Discussion & Sharing*



# Breakouts Round 2



# Discussion Questions



**Scenario:** *Your team is launching a new detailing campaign on pediatric immunizations. You have only detailed adult primary care providers in the past. Your team is preparing to begin outreach to pediatric clinics and promote your program.*

1. Identify at least **3 specific challenges** you will face trying to gain access to these clinics and clinicians?
2. Choose **3 strategies to build relationships** with gatekeepers and clinical teams.

*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!

# *Large Group Discussion & Sharing*



# *Type in the Chatbox*

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If you were a gatekeeper in a busy clinic, what's one thing a detailer could do that would make you soften/be open to allowing them access?



# Follow-Up Visits

- Don't let too much time go by between follow-up
- Follow-up thank you and lead into next visit
- Answer questions you said you were going to answer
- Sometimes you become the connector for other things 😊
- Something, unexpected
  - above and beyond, that's sincere and extends your service
- After-sales service



# Final 'Mantras' to Remember



# NaRCAD

## Technical Assistance

### Program Building

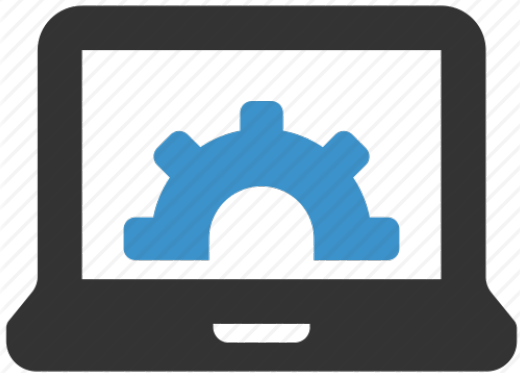
- In-person trainings, webinars, and ongoing virtual support, including training videos, resources, & more.

### Zoom Support

- Follow-up to help you trouble shoot your visits and deal with challenges along the way.

### E-mail Support

- Unlimited guidance, resource requests, & troubleshooting.





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