



Skill Building for
AD Program
Managers:
Leading
Sustainable
Teams

Today's Presenters:

Megan Pruitt, PharmD

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Presenter Disclosures

Sarah Ball and Megan Pruitt

- No conflicts of interest to declare
- SCORxE AD Grant funding to acknowledge
 - SCDHHS/Centers for Medicare and Medicaid Services (CMS) – Drug Utilization Review Program

Tony de Melo

- No financial relationships or conflicts of interest to disclose

Today's Breakout Session Agenda

1:15pm – 1:30pm ET: Welcome and Level Setting

1:30pm – 1:45pm ET: Breakout Groups Round 1

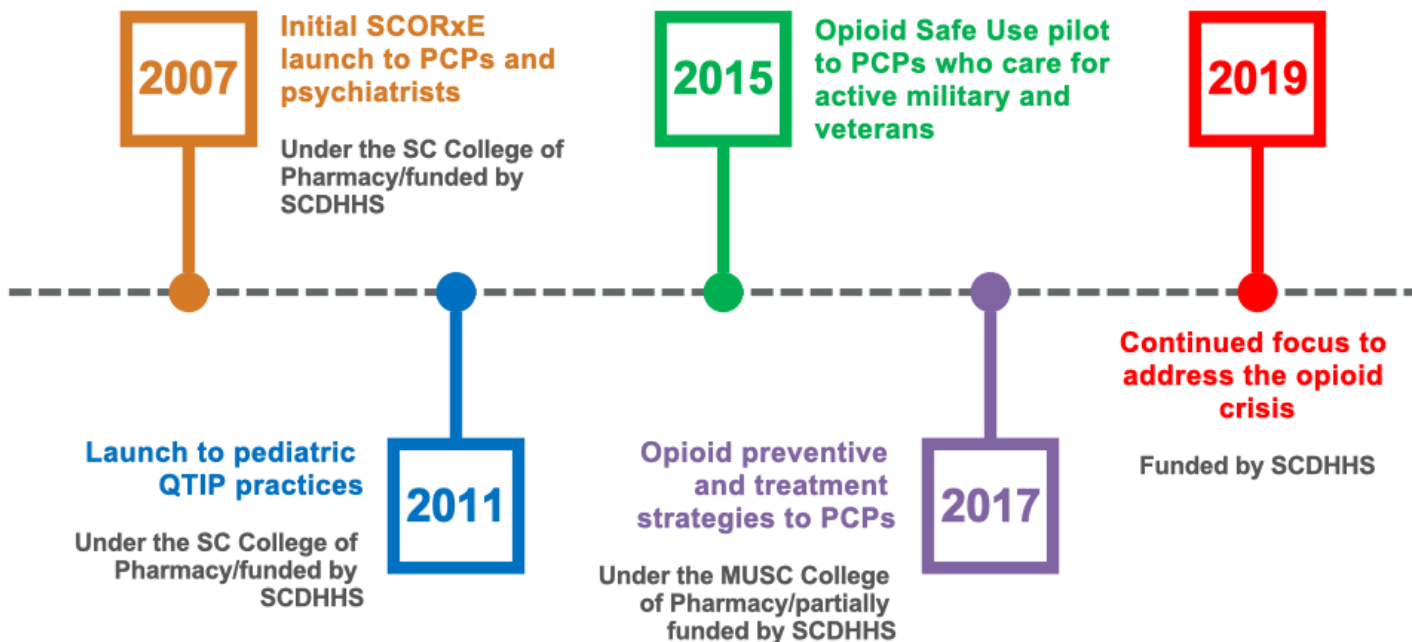
1:45pm – 2:05pm ET: Large Group Discussion

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

2:20pm – 2:45pm ET: Large Group Discussion and Wrap-up



SCORxE Academic Detailing Service

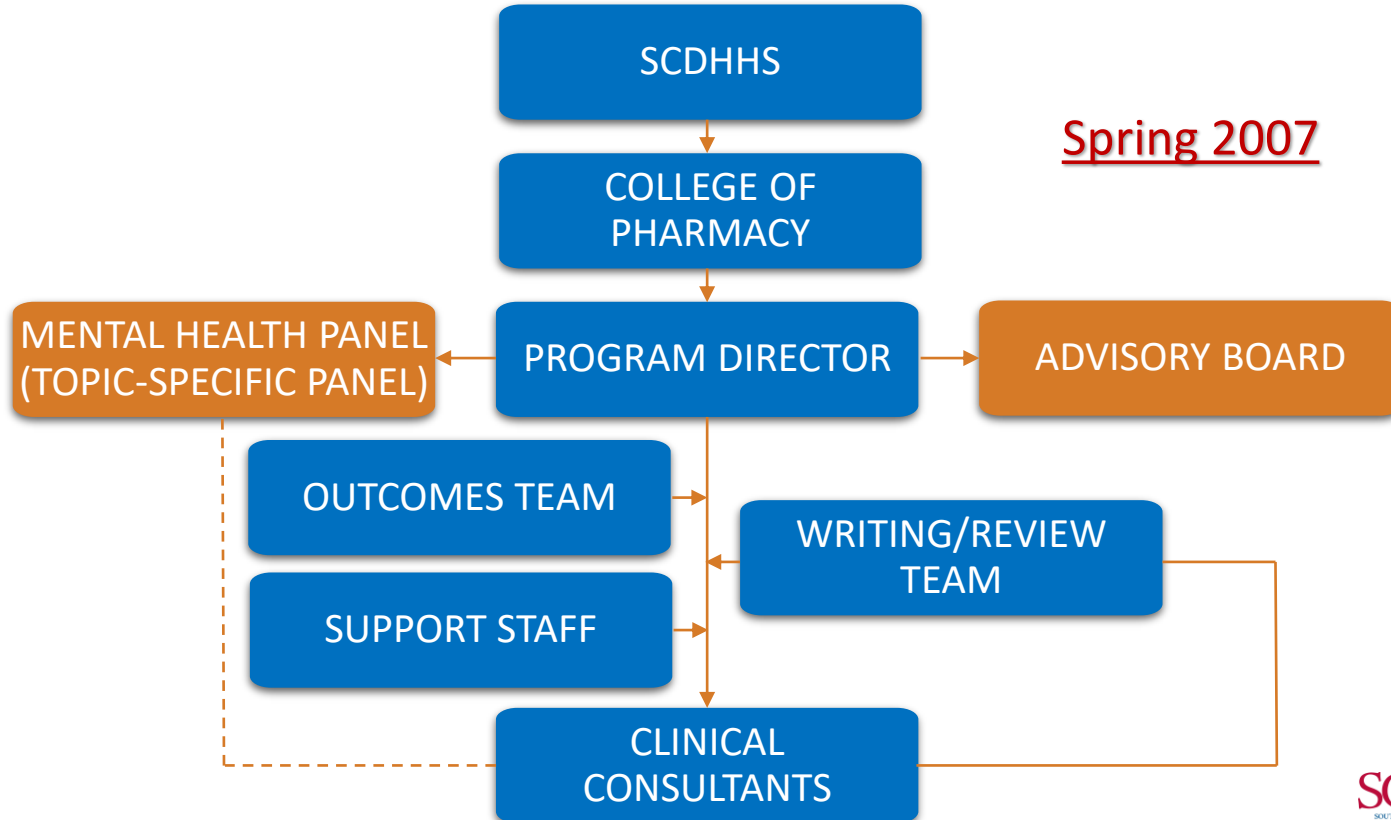


Other funding sources: SC Tobacco Collaborative, NIDA/Brandeis University, CDC/SC DHEC, SAMHSA/SC DAODAS



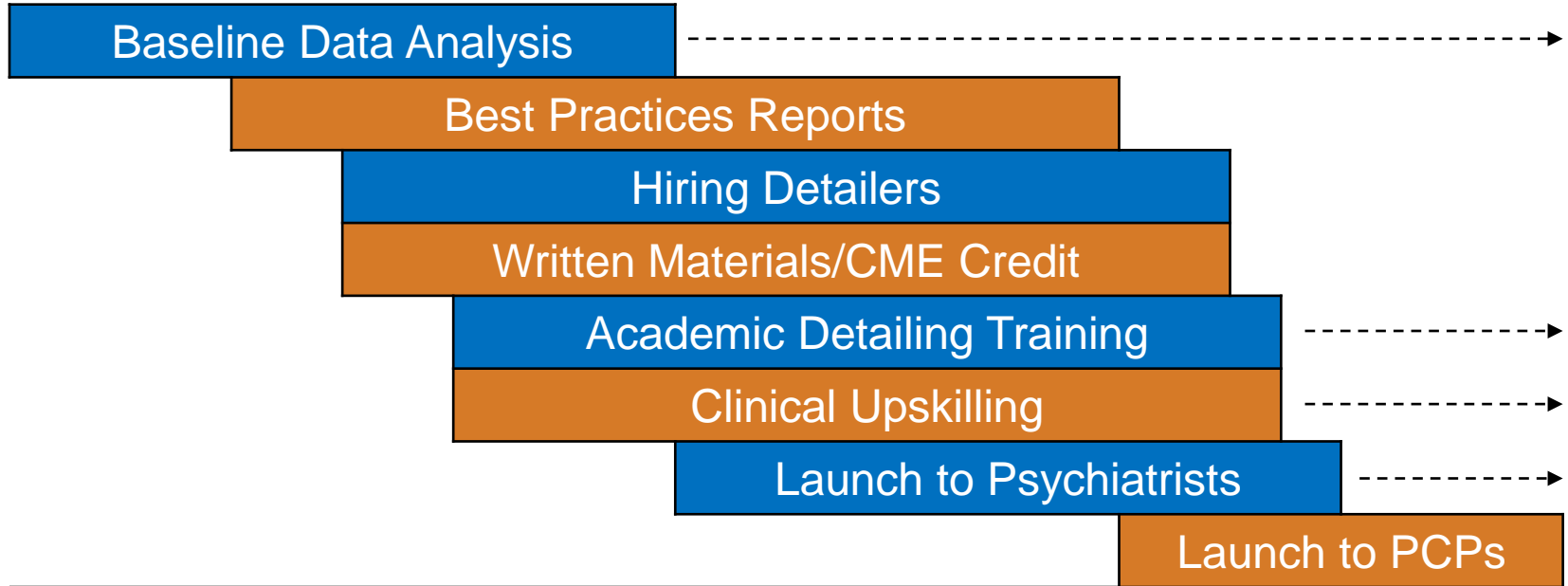
SCORxE

Original Organizational Structure



SCORxE Initial Launch

A different view of the organizational structure



Feb '07

Apr '08

SCORxE in 2007 and SCORxE in 2021

What is the same

Fully funded by SCDHHS

Writing group includes clinical pharmacists, physicians, and other healthcare professionals

Contribution of content experts to intervention strategy and clinical topics

All detailers are clinical pharmacists

“Signature” blue folder for print materials

Continuing Medical Education (CME) credit

What is different in 2021

Partnership with the College of Medicine

Collaboration with MUSC Drug Information Center for background research and free access to the Center for providers visited

Organizational structure for engaging content experts

Full time detailers (vs full and part-time)

Core handout content and design

Live CME for select topics



How it Started...



How it's Going...



The “Three Rs” in AD Management



- **RELATIONSHIPS**

- Funders
- Potential funders

- **RELATIONSHIPS**

- Other AD programs and managers
- Professional colleagues

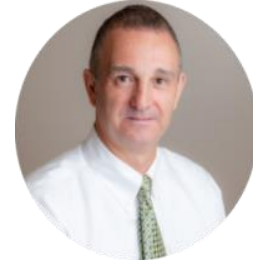
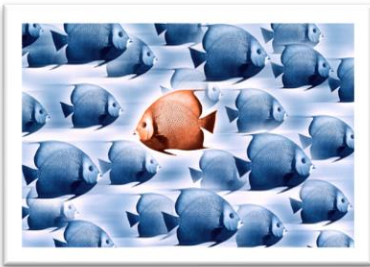
- **RELATIONSHIPS**

- Detailers
- Expanded team (e.g., writing group, content experts, support staff)

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



Tony de Melo, RPh

Director of Clinical Education Programs

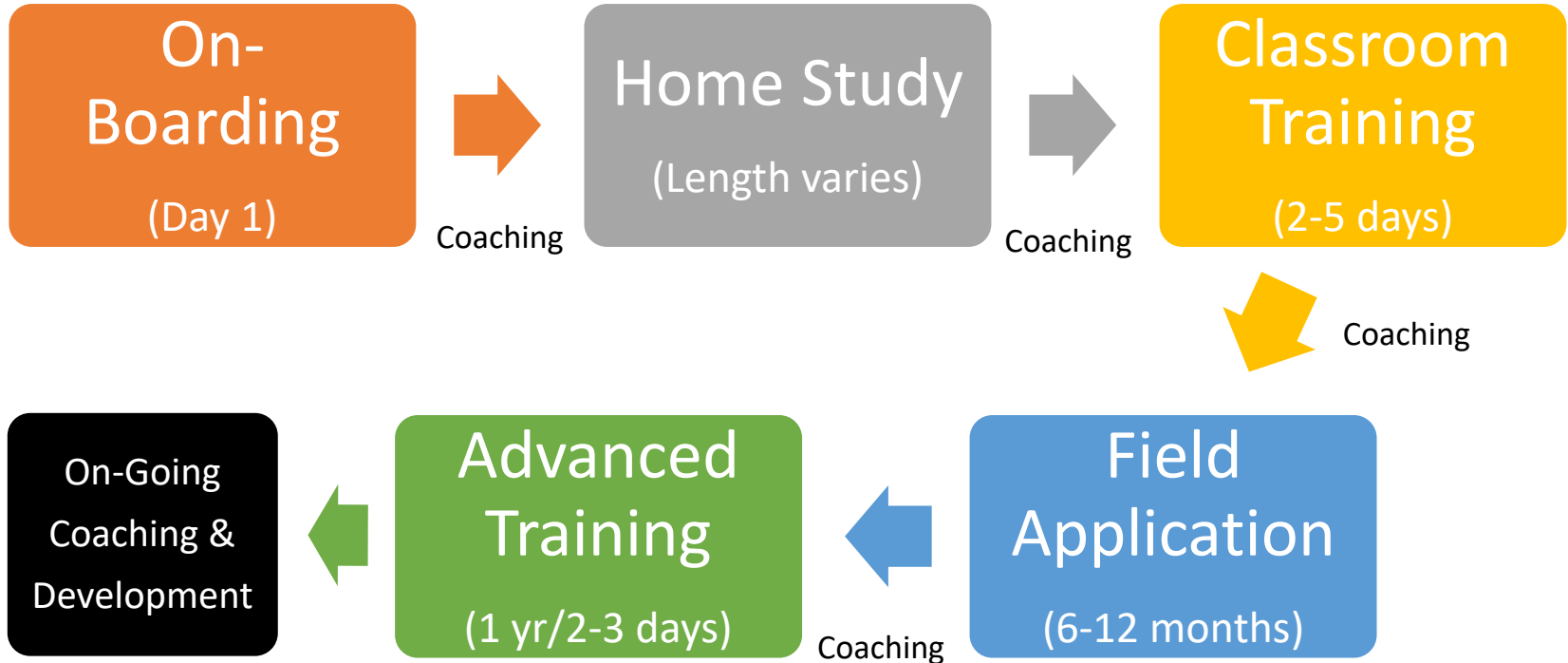
- Recruit and hire the best people
- Train and develop them for success
- Utilize metrics, feedback and reporting to improve outcomes
- Coach for process improvement

Recruiting and hiring for success



- **Identify competencies and traits**
 - Job description
- **Create job posting(s)**
- **Initially screen for prerequisites and experiences needed**
 - Develop standardized screening tool
- **Complete a couple rounds of interviews with several stakeholders**
 - Utilize standardized interview guide
- **Hire best candidate(s) with competencies and motivational fit to succeed**

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

Program evaluation

- **Metrics**

- *Visits per detailer*

- Types of visits, time per visit, CME completion
 - Reach & frequency of visits to providers

- *Measurable results*

- Such as PDMP data, prescribing data, other qualitative measures

- *Utilize spreadsheets or Customer Relationship Software (Salesforce) to capture data*

- **Feedback**

- Survey responses

- **Reporting**

- Monthly, quarterly or other identified frequency


Opportunities
Improvement & Coaching

Coaching and feedback

- Begins day 1
- 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) 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: - Cites 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:			
Total Score			

	
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 bi-monthlies 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: <ul style="list-style-type: none"> • Preparation for each day and visit • Salesforce data entry and submission 	
Areas to Develop: <ul style="list-style-type: none"> • Creating a territory routing plan/schedule <ul style="list-style-type: none"> o This will help you navigate the territory more effectively and keep you on a consistent schedule. • Writing more effective visit notes <ul style="list-style-type: none"> 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. 	
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Breakouts Round 1



We'll see you in 15 minutes



Remember

- The case studies and discussion prompts are available to view at narcad.org/breakouts
- 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!

New Program Case Study

- You just received funding for a **statewide academic detailing project**.
- This is going to be **your first project** and you have many things to put in place to start.
- You have been **funded for at least two years** with potential for additional years.
- **CAMPAIGN TOPIC**: proper **immunizations for the elderly**.
- You received a target list of **1,500 providers to visit** throughout the state.
- **METRICS FOR SUCCESS**: **the number of detailing visits** to the target providers.

Discussion points:

- 1. How will you recruit and hire the detailers?**
- 2. What will your training program look like for these detailers?**
- 3. How will you continue to develop, motivate, and coach your detailers for success?**

Large Group Discussion & Sharing



Breakouts Round 2



We'll see you in 15 minutes



Remember

- The case studies and discussion prompts are available to view at narcad.org/breakouts
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- Have fun!

Case Study for Existing and **New** Programs

- An academic detailing (AD) program has focused on behavioral health topics for **adult primary care**
- **Funding has changed** educational outreach from an adult **to a pediatric focus**.
- **You as AD manager have been asked to develop:**
 - **A topic on asthma**
 - **An intervention strategy** for delivery to pediatric practices collaborating on selected quality measures and quality improvement projects.
- **Content development** and **delivery** will need to effectively integrate with other components of this initiative.

Discussion points:

- **How will you approach key message selection, content development, and creation of support materials?**
- **What will be your approach to clinical upskilling and training on topic delivery?**
- **What, if any, incentives will you offer to clinicians you visit?**
- **How will you schedule visits?**

Large Group Discussion & Sharing



Stay in touch!

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