Beyond the Visit : Practical Approaches for Lasting Engagement

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UIC

- Speakers have no conflicts of interest to disclose

Presentation Objectives

- Define outreach success
- Apply top-down approach to connect with organizations
- Build confidence in initiating outreach conversations
- Identify and celebrate small wins to stay motivated
- Develop strategies for maintaining long-term connections

Warm Up – Normalize the Challenge

- How confident are you in outreach, and what's one challenge you've faced?

The Outreach Challenge

- **Normalize discomfort**
  - Outreach feels uncomfortable at first, and that's normal! ***Everyone starts here.***
- **Identify target audiences**
  - Build an outreach toolkit of resources/contacts
    - Organization websites, LinkedIn connections, Conferences
- **Anticipate common challenges**
  - Cold emails and phone calls
  - Lack of response from organizations/clinics/physicians
  - Gaining access but not commitment
  - Direct rejection

Chat Waterfall – What is Success

- How do you currently define/measure success in your academic detailing program?

Traditional Success

- **Meet target goals**
  - Contact XX volume of organizations per week/month
  - Conduct XX volume of AD visits per week/month
  - Maintain ongoing relationships with XX clinicians per year
- **Quantitative metrics are important but are not the only measure of success**
- **Imagine you get to determine and define success for your AD program**
  - What would you assess?
  - How would you measure it?
  - How would you sustain it?

Success Reimagined: Progress Over Perfection

- Normalize – falls come before wins
  - *The only thing to fear is fear itself*
- Compare notes with peers
- Celebrate success – big and small
- Share team shoutouts or recognition

Outreach is about building bridges, not just crossing them

Illinois ADVANCE Outreach Markers

Outcomes Measure	2024	2025*
Outreach attempts	7734	2196+
Outreach connections made	228	121
Visits	4489	2090

** Through 09/30/25*
+ No formal outreach from May to September

Key Takeaways:

- Detailers experienced several falls before wins
- Take those falls and learn from them
- Be persistent with the climb

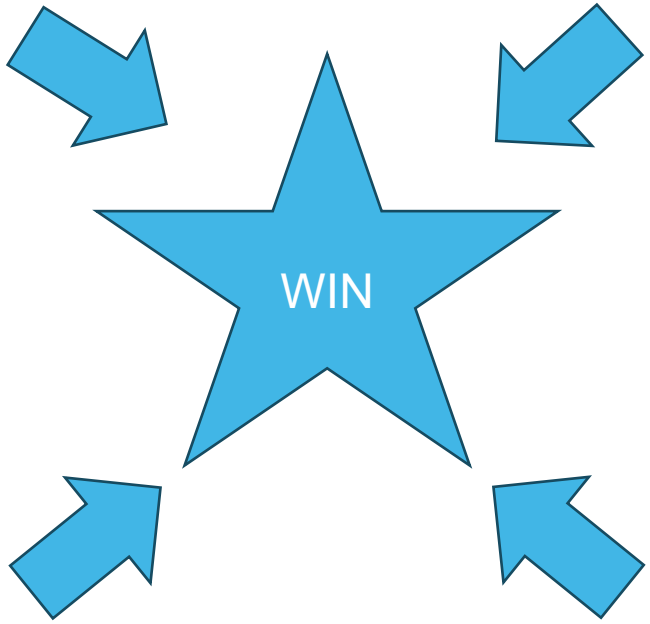
Success Reimagined

Effort

- Organization Found
- Email Sent
- Phone Call Made

Progress

- Reply Received
- Right Contact Found
- Email Forwarded to Champion



Connection Made

- Meeting Scheduled
- Visit Scheduled

Implementation

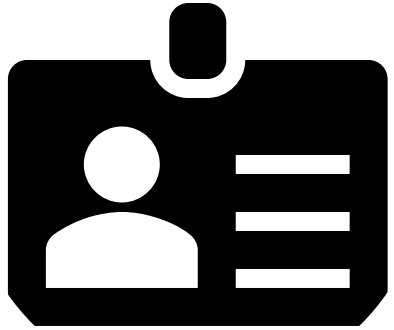
- Initial Meeting Completed
- Visit Completed

Chat Waterfall – Redefine Success

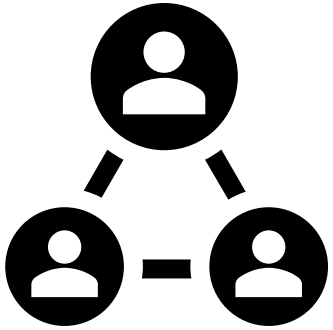
- What is one "win" you've had in this space, no matter how small?

How to Connect : Three Phases of Outreach

Identify and Research



Contact



Assess and Maintain Connection

Phase 1:

IDENTIFY AND RESEARCH

Identify Potential Organizations

- Identify organizations based on clearly defined goals of your AD program
- Align program AD goals with organizational priorities

- Examples:
  - Residency Programs
  - Health Systems
  - Statewide Organizations
  - Managed Care Organizations

Research the Organization

- Conduct an objective ***Needs Assessment*** **OF** the organization
- Use public data to predict needs and AD's role in addressing gaps
  - Mission statements
  - Prevalence rates of disease states (urban vs rural)
  - Resource availability
  - Health plans or initiatives

Determine Fit

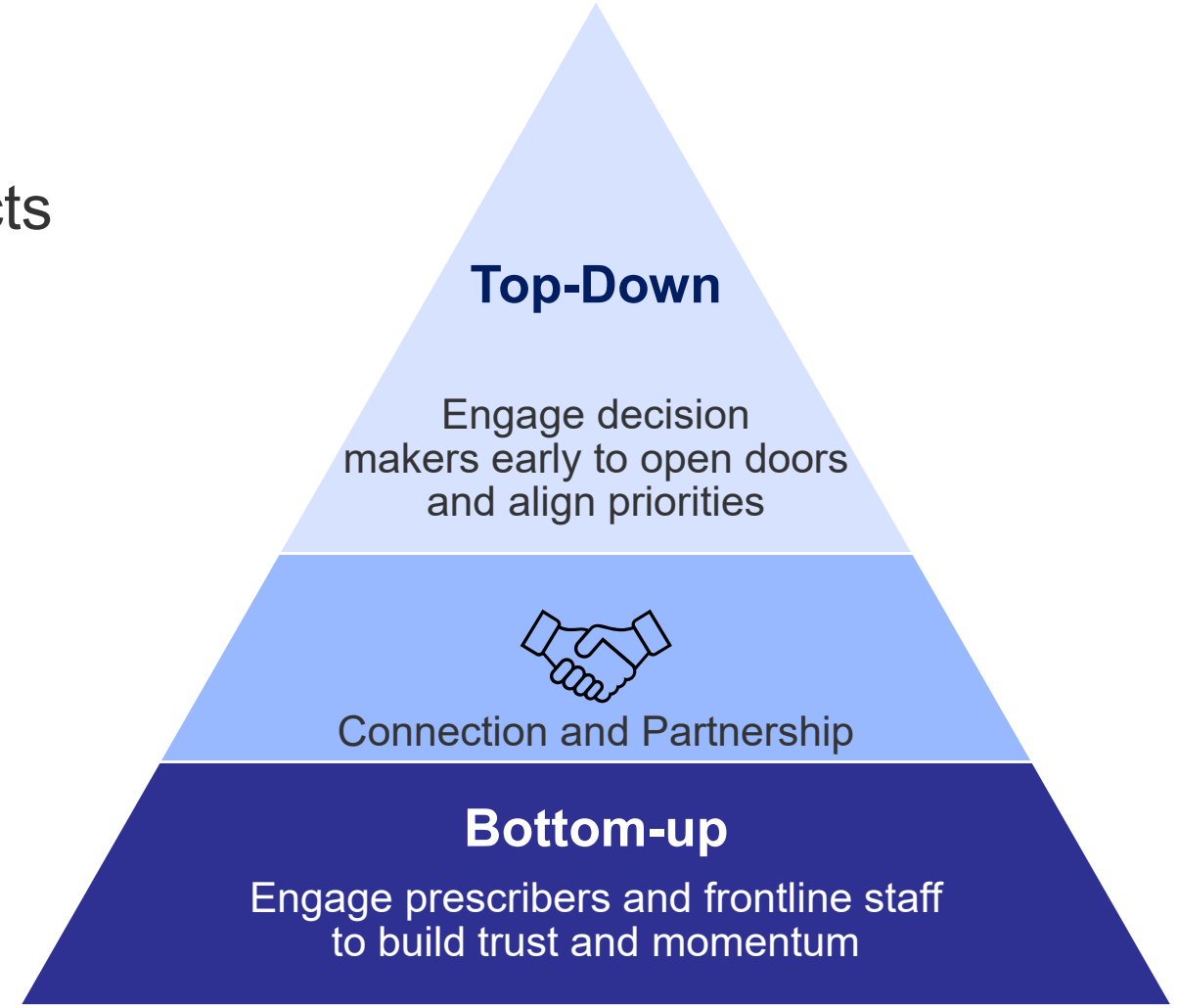
- Assess fit
  - Are we understanding the *needs* of the organization?
  - Is this in alignment with our AD program goals?
  - Are we prepared to help lessen the organization's anticipated barriers?

Propose Potential Solutions

- Develop tailored value propositions ***(key messages)*** on the utility of AD
  - Save time
  - Clear, confident communication
  - Improved patient outcomes
  - Clinical updates
  - Get specific!
- ***Remember – AD does not fix every healthcare issue.*** It provides evidence-based education and tools to guide clinical decision-making and improve outcomes

Identify Key Contacts

- Identify “champions” and key contacts within the organization
  - Clinical leaders
  - Grant coordinators
  - Quality improvement leaders
  - Education Coordinator
  - Clinic Manager
  - Health System Administrator
  - Chief Medical Officer



Phase 2:

CONTACT

Initial Outreach

- **Lead with Connection**
- In your ***introduction***, frame your outreach as a collaboration, not a sales pitch
  - Make them the hero
  - Directly address the problem or barrier that this will improve
    - Mental burden
    - Bringing specialty topics to primary care

Meeting Scheduled – What to do next?

- Conduct a subjective ***Needs Assessment*** **WITH** the organization
- Use *open-ended questions* to better understand the *needs* and *barriers* of the organization.
- Adjust the proposed potential solutions developed in Phase 1 based on this Needs Assessment

Introducing Academic Detailing

- Link academic detailing (and your team's) ***benefits*** to the organization's priorities
- Emphasize the value of regular meetings
- Discuss ways to integrate academic detailing into the organization's workflow

Address Objections

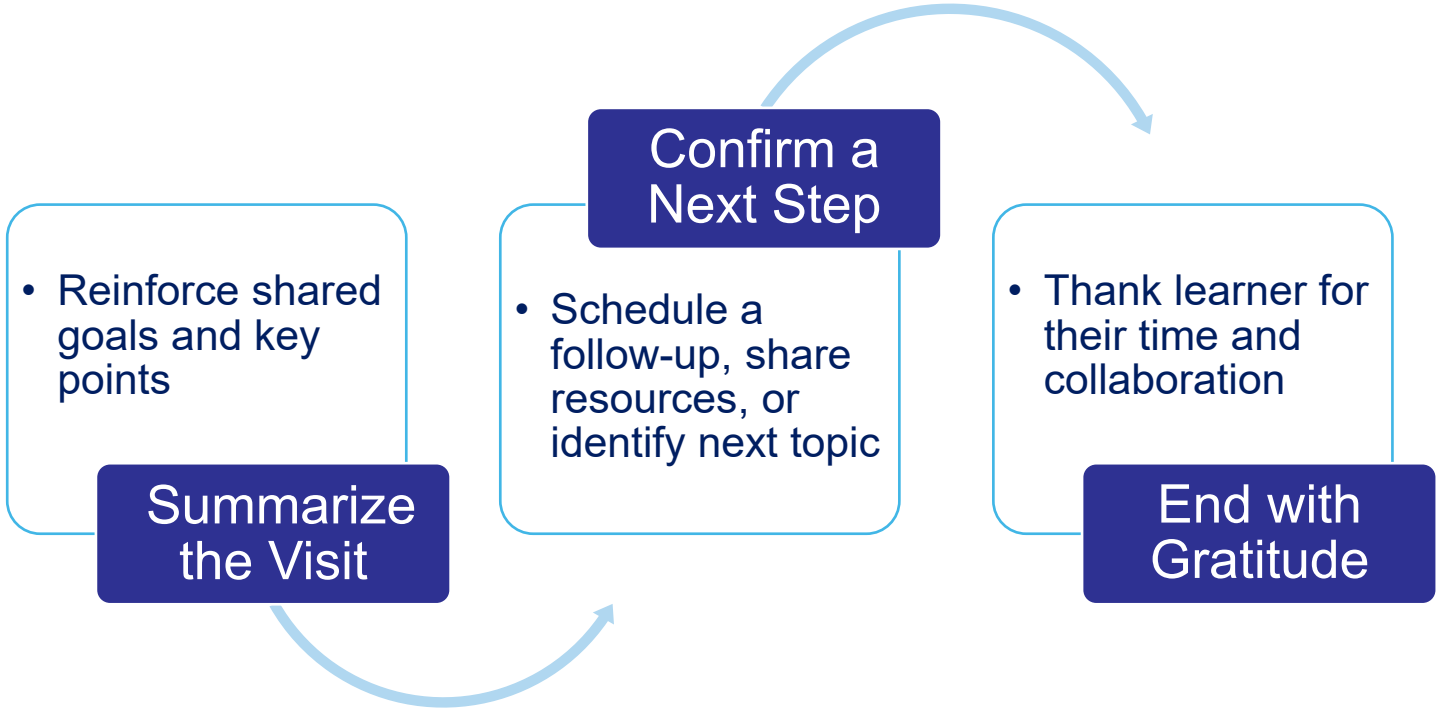
- Use proven academic detailing strategies to address *objections:*

💬 Empathy	🔄 Reframe	📊 Evidence
• Acknowledge and validate the concern • *"I understand this can be challenging..."*	• Shift the focus to shared goals • *"That's a great point. What we've seen is..."*	• Provide relevant data or guideline-based points • *“I understand your hesitation. Here is what the evidence shows..."*

Remember: It’s not about convincing, it’s about understanding

Close with a Call to Action

Golden Rule: *Leave every meeting with a next step*



Ensure there is an “ask” with each discussion, even if it is a small one.

Humanize the Interactions

- Remember, you're building a relationship
  - Understand clinician learners have busy schedules
  - Express value and appreciation
  - Ask thoughtful questions to understand their goals and challenges, and encourage them to do the same

- ***Connection Over Quotas = the Heart of Every Meeting***
  - Focus on each connection not as meeting a metric, but on building trust and developing a collaborative relationship

BREAKOUT Session

Breakout Session:

- Choose an organization type:
  - Residency Program
  - State Organization

- Draft a short outreach message (3-4 sentences).
  - Personalize: mention their role or shared goals
  - Empathize: acknowledge challenges they may face
  - Connect: explain how academic detailing can support them

- After Breakout:
  - Volunteers share their draft and reflect on what felt natural and what was challenging

Breakout Roundup

What did we learn?

Illinois ADVANCE – Initial Email Example

Dear (CONTACT),

My name is (NAME), and I am a clinical pharmacist at the University of Illinois Chicago. I wanted to introduce you to Illinois ADVANCE, a program we launched in 2020 to provide free, evidence-based educational resources for healthcare professionals across Illinois.

We would love to connect with someone at the Illinois Public Health Association to explore ways our program could support your members and expand our shared reach. Our current educational topics include (XYZ). All resources are research-driven, up to date, and designed to help prescribers improve patient care.

I've included an introduction letter which outlines Public Act 101-0278 and how Illinois ADVANCE was established. You can also learn more on our website: Illinois ADVANCE | University of Illinois Chicago

Please let me know if there's a specific member of your team I can reach out to about potential collaboration.

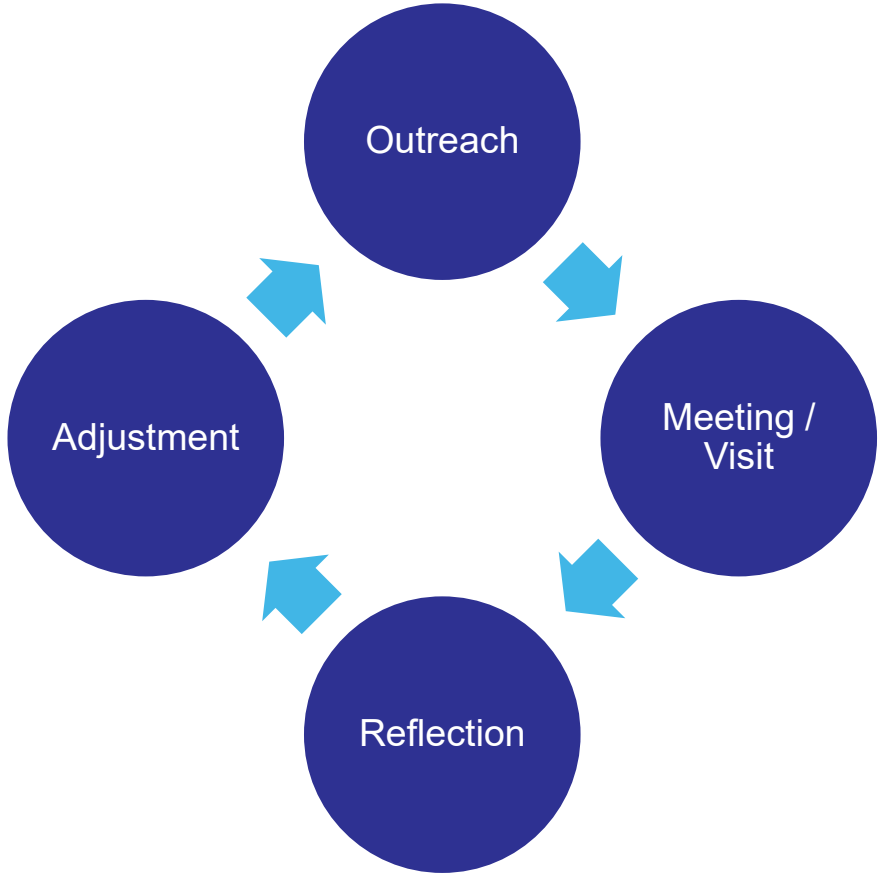
Thank you for your time and consideration. I look forward to connecting with you.

Phase 3:

ASSESS AND MAINTAIN CONNECTION

Assessment: Learning & Adapting

- **Reflect on Outreach Attempts:**
  - Which emails/calls got replies?
  - Which subject lines or introductions worked best?
- **Assess the Relationship:**
  - Did the conversation move closer to a meeting?
  - Was trust built, even if no meeting yet?
- **Adjust Strategy:**
  - What will you try differently next time?
  - Is this organization/contact still the right fit?
- **Tools to Use:**
  - Track outreach attempts (spreadsheet, CRM, simple log)
  - Compare notes with colleagues
  - Celebrate small wins



Strategies to Maintain Connection

- Send resources in a timely manner
  - Additional program information
  - Educational tools and material
  - Program updates and announcements

- Build upon your current connections
  - The healthcare network is 6 degrees of separation
  - Inquire about organizations your connection may already collaborate with

- Set a reminder for regular follow-up on your calendar
  - Contact [insert organization name]
  - Set for 3 months from today

Illinois ADVANCE Connections

- **Illinois Public Health Association**
  - Initial connection with Associate Executive Director (July 2021); ongoing partnership
  - Connection led to additional contacts (IDPH)
  - Regular monthly check-ins
- **Southern Illinois University Medicine**
  - 2+ years of continuous outreach
  - Connection with Internal Medicine led to additional contacts (Family Medicine, Ambulatory Care)
  - Consistent visits for the past 1.5 years
- **Aetna Better Health of Illinois**
  - Conference presentation and exhibit booth led to connections
    - Regularly scheduled visits with suburban primary health care clinic
    - Collaboration with American Heart Association/American Medical Association Target BP initiative
- **Mercyhealth** – Regularly scheduled visits with Internal Medicine and Family Medicine
- **Crusader Community Health** – Integrated into the employee onboarding process

What Did Illinois ADVANCE Learn? What Can Your Organization Do?

- Persistence is key
- Normalize all components of the outreach process
- Redefine the meaning of success
- Utilize resources available in your area and in the AD community
- Know the value, strength, and capabilities of your entire program and convey it with confidence

Let Outreach Find You

Key Takeaways

- Success is broader than partnerships
- Top-down approach = strategic starting point
- Confidence grows with practice and small wins
- Relatable, empathetic, personalized outreach resonates
- Network within your network
- Adapt your approach to what's realistic for your program

Moving from "What AD is" to "What AD can do for you"

Closing - Chat Waterfall!

What's one next step you'll take to strengthen your outreach efforts? What insight will you apply to your program?

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