Planning & Preparation for Successful Detailing Visits

National Resource Center for Academic Detailing
Division of Pharmacoepidemiology and Pharmacoeconomics
Brigham and Women’s Hospital
Harvard Medical School
1:1 Visits are Successful When You’re:

- Prepared
- Efficient
- Effective
The Life of a Detailer:

"Face Time" must be leveraged by other activities.
Preparation:

- Prepare your key messages, features, benefits in advance.
- Know your content & materials inside and out.
- Achieve fluidity from materials to discussion through scripting and practice.
Efficiency:

- **Focus on high impact visits—do your research**
  - Clinic research: Patient panels, # of clinicians, etc.
  - PDMP Research

- **Introductory visit vs. follow-up visit**
  - How much time will you need?
  - Will you need a follow-up visit or visits?

- **Time Management:**
  - Accomplish your goals in allotted time
  - Plan day to maximize number of quality encounters
Effectiveness:

Remember why you’re there!

- To ignite the desire for change
- To promote action
- To build a relationship over time
ASSESS: Are You On Target?

- Is your messaging effective?
  - Are your messages being well-received and understood?
  - How do you know?
  - If not, what do you do?
PIVOTING:

Revise your messaging & actions:

- You should always be assessing needs—yours, and the clinician’s!
- Continue to gauge your effectiveness throughout the visit.
- Always be aware of resources and time, and stick to the timeframe you agreed to.
Prepare for Obstacles:

- What might a front-line clinician say? Object to?

- What’s your plan if the conversation changes direction? What will you do?

- Have you practiced enough to go “off-script”?

- Practice, Practice, Practice!
Ways to Practice:

• Write it out!
• Practice in front of a mirror.
• Audio record yourself saying your introduction or closing.
• Try it out on a friend who doesn’t know the project and ask for feedback.
• Practice with another teammate via phone, Skype, or in person.
• Review our toolkit for detailing videos, tip sheets, and scripting tools!
Remember the Structure of a Visit:

1. Introduction
2. Needs Assessment
3. Key Messages, Features, & Benefits
4. Handling Objections
5. Summary
6. Closing Your Visit