

Worksheet: It's ALL in the Detailer!

A breakout session focusing on supporting, mentoring and teambuilding in academic detailing

Overview

Facilitators:

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Purpose of the Workshop: The success of academic detailing largely depends on having detailers that are well trained, given ongoing support, and able to connect and grow as part of a detailing team in spite of often being decentralized geographically.

Learning objectives:

- Participants will gain skills in mentoring around the common challenging areas for academic detailing.
 - Participants will discuss how much 'topic preparation' is required.
 - Participants will explore and gain strategies to build teams and overcome a feeling of isolation among detailers
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Approach to Workshop

Purpose of this Worksheet: To provide each participant the opportunity to record their own insights and comments as well as keep track of new ideas or comments from other participants throughout the workshop.

Organization of Workshop:



Scenario Overview:

For each scenario consider –

- **What has been your/your team's experience?**
- **What has been the biggest barrier you/your team has faced?**
- **What helped you/your team overcome the barrier?**
- **Would you do anything differently next time?**
- **Is there any support/resource that would have helped you/your team?**

Your Initial Thoughts During Setting the Stage

Take a moment to capture your initial thoughts and/or notes based on hearing your colleagues introduce themselves and begin discussing why they are attending the workshop and what they hope to get out of it. Consider the above questions at the high level to begin mapping your thinking on Team Building overall.

Scenarios

#1 - Upskilling preparation

- a. **Striking a balance - How much is “just right”?**
- b. **When there is a significant evidence component and risk of information overload**
- c. **When there is a lot of controversy amongst clinicians in the area and local specialist recommendations are not in line with the evidence**
- d. **When detailers have different learning needs**

You are about to launch a new topic on Inhalers for COPD. The content development team has thoroughly reviewed the literature, the needs assessment has identified specific knowledge gaps and the written materials are at the printer. For the past 4 months, the academic detailers have received weekly or bi-weekly preparation sessions on COPD pathology, diagnostic tests, pharmacology of the inhalers, ‘peripheral’ topics (e.g. smoking cessation, antibiotics for chronic bronchitis, etc.), comparison of guidelines, the written materials and recommendations. The academic detailers have attend a 2 day in-person workshop for an in-depth discussion of the evidence, evidence gaps, incongruence of the evidence with clinical practice guidelines, and discussions on anticipated barriers. You think they should be ready to go.

Today, one of the detailers says to you, that they will be starting their detailing sessions in about a month as they need to reread all of the relevant articles and developing a PowerPoint presentation. You are surprised and wonder why the 4 months of preparation was not enough. How much time do academic detailers need to prepare before they can get started?

- How do you respond?
- What can you do as a program administer to increase the efficiency of this process and ensure that the different learning needs of the academic detailers are met?
- How does preparation differ if there is controversy among clinicians or if the specialist(s) in the area don’t seem to follow the evidence?
- How might upskilling and team-building intersect in this scenario?

NOTES:

#2 - Challenges of creating dialogue

- a. With a non-verbal physician
- b. With a small group of physicians, where only some are quite verbal
- c. When the detailer lacks clinical experience in topic area

1. You are receiving fairly consistent feedback that suggests some participants feel a bit put down or talked “at” by one of the academic detailers. You have tried to cultivate the detailer’s capacity to both appreciate and conduct “conversational” visits, and resist being “the teacher”.
 - How might you approach this situation to help the detailer become more appealing and successful in academic detailing encounters?

NOTES:

2. Your detailer contacts you regarding an upcoming visit (on behaviour management in dementia) with a LTC physician. The clinician being detailed is very experienced and confident in the topic area. The detailer has never worked in LTC and struggles as to whether she has anything to say that will be valued and not dismissed.
 - How would you counsel the detailer in preparation for this and future visits?

NOTES:

Scenario #2 Continued

3. Your detailer is concerned as she has a few physicians who don't say very much when she visits with them individually. At the first visit, she thought it was just some 'awkward' first meeting stuff, but even the 3rd and 4th sessions have not been very interactive. For the most part, the participant just nods politely. She is wondering what she should be doing to increase their engagement level.
 - How would you assess and counsel the detailer in preparation for future visits?

NOTES:

#3 - Support through challenging encounters

- a. **Skepticism that the messaging is biased; “You just care about cost!”**
- b. **When the discussion goes way off topic**
- c. **In what ways might team-building help support challenging encounters?**

1. One of your experienced academic detailers calls you and she is very upset. Normally, she is a calm and soothing person known for her excellent listening skills, ability to empathize with clinicians and skillfully guide academic detailing conversations. However, today she has received an email from a physician she met with last week; he is also a coordinator for the local family practice residents program. During the session, they had discussed oral anticoagulants for atrial fibrillation and having her provide a session on the same topic with the medical residents. However, the email says that after further consideration, the physician feels that the detailer should not meet with the family practice residents as she is too biased towards the use of warfarin because it is cheaper. He makes several (erroneous) statements about the ‘mistakes’ he believes to be in the information. The detailer has decided to respond to the email and defend the accusations by pointing to the evidence that supports the message. She wants to know if you will review her response before she sends it to the physician.

- How can you support and guide the academic detailer in this situation?

NOTES:

2. An academic detailer returns from a session, but is a bit frustrated because she was only able to discuss one of the topic’s key messages. The session had started well, but after a few minutes, the physician had started asking questions about minor point and before she knew it they were way off track and never got back to the actual topic they were supposed to be discussing.

- What guidance can you provide to this detailer?

NOTES:

#4 - Team building

- a. Overcoming isolation
- b. Over distances
- c. Integrating new academic detailers into an established team

1. You have a group of 6 academic detailers in your program. Most work part-time and they are physically located in different communities. A couple have mentioned that it is difficult to maintain focus because they have no one to work with
 - What can you do to help academic detailers overcome a sense of isolation?
 - What can you do to foster a team environment between the academic detailers?

NOTES:

2. A new detailer has joined the team. She has extensive experience as a community pharmacist and has been a participant in many academic detailing sessions, but has no experience as an academic detailer. She is very enthusiastic and excited about the opportunity to be an academic detailer. After 2 months of orientation and upskilling training (which she needed to do on her own), and the successful completion of a couple of academic detailing sessions, she tells you that she is a bit overwhelmed by the group. She finds them very nice and helpful, but their collective knowledge and experience with academic detailing is making her feel 'inadequate'. She is worried that she will never be able to perform at their level.
 - What could you do to facilitate her transition into the team?

NOTES:

Additional Notes from the Workshop

Consider capturing:

- Tips and Tricks that you shared or heard from your colleagues
- Contact information for people that you've met during the workshop that you can follow up with
- Resources or websites etc. that might offer additional support

Final Thought and Wrap Up

If there is one thing you will do when you go back to work because of this workshop, what would it be?