"Smarter Workflows, Same Human Connection: Leveraging AI for Clinical Education"

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Guest: Victoria Montelpare, Manager, Centre for Effective Practice

Anna: *You're listening to Changing Minds: Transformative Talks for Healthcare Improvement. Grab a coffee or tea and join our team as we chat with leaders in the academic detailing space. For more information on academic detailing, visit us at narcad.org.*

Anna: Welcome back to *Changing Minds*. I'm your host, Anna Morgan-Barsamian. Today, I'm excited to welcome Victoria Montelpare from the Centre for Effective Practice, or CEP. Victoria is a manager at the CEP leading the planning, implementation, and evaluation of their academic detailing service. She is also presenting at our upcoming NaRCAD conference on November 12th and 13th in Boston, Massachusetts, and I will share more about that conference at the end of this episode. Welcome, Victoria! How are you today?

Victoria: Thank you! I'm great, thanks for having me on the podcast.

Anna: Of course, we're happy to have you. So, for listeners who may not be familiar with the Centre for Effective Practice, can you briefly introduce the CEP and your role there, and tell us a little bit about the work you're doing around academic detailing?

Victoria: Sure. So, the Centre for Effective Practice, or CEP, we're a Canadian not-for-profit organization based in the province of Ontario, really focused on helping clinicians navigate the increasingly complex healthcare environment. And so a big part of our work in doing that is helping to bridge the gap between what the evidence tells us and what actually happens in clinical practice, because we know that they're not one and the same. And so one of the big programs that we have at CEP is our academic detailing service, for primary care clinicians across the province.

And so for my role, as you mentioned in your intro, I'm the manager of our academic detailing service. And I've been working on our detailing service since I joined the team coming up on 9 years ago. So it's been a long-term relationship.

I've been managing the service for over 5 years now, so again kind of overseeing its planning, implementation, and evaluation. And while I'm not an academic detailer and I don't have a clinical background, I kind of help our team to support the service as a whole and look at how we can continue to deliver it effectively and sustainably. And so AI is kind of becoming part of that journey.

Anna: Yes, and that's definitely something I want to chat about, so perfect transition. So we know that AI is becoming an increasingly common topic in healthcare and clinician education, so what initially sparked the CEP's interest in exploring how AI could support academic detailing?

Victoria: Yeah. So I think the world that we live in today where everyone's either using AI or

talking about it, we'd be remiss not to explore how we could use it ourselves at CEP. And so we've been doing that more broadly, both in the work that we do internally, including and beyond our academic detailing service, and then also how we support our clinicians.

And so for our detailing service specifically there's so much that goes into academic detailing beyond just the visits with clinicians. And so we started by looking at kind of whether AI or automation could help make some of the work that our detailers do around those visits, you know, make it easier, a little more streamlined, even take off some of those things from our detailers' plates to free up more time for what really benefits from their expertise as academic detailers.

And so we've been kind of experimenting with different applications, seeing where it can add value, and learning a little bit more about their limitations. And so for us it's kind of about finding that practical balance of using AI to genuinely support the team without compromising the work that they do in providing support to clinicians.

Anna: So we're talking about AI for the detailing team, as well as how AI is being used with clinicians as well. It's kind of both. So when you think about the day-to-day work of your AD program, where do you see the greatest opportunities for AI to save time or make workflows more efficient?

Victoria: I think there's a lot of opportunities pretty much throughout the whole process of planning an AD campaign to evaluating it. So, before a visit, AI can really help us work through the massive evidence base that typically goes into developing an AD campaign. The detailers do a lot of pre-reading to learn the evidence and understand the topics so they can speak to it. So there's a lot of use for AI there in streamlining that preparation work.

There's also a ton of administrative tasks that the detailers have to do, which I think AI and even more so maybe automation, which is I think, you know, it's not the same as AI, but I think it's talked about a lot in the same context. So where AI and automation can help reduce those administrative tasks like booking visits and sending reminders and all those kinds of things.

And then after the visit, typically, I know for us and a lot of programs, we document the visit so that we know like when the visit happened, who it was with, what things we need to follow up on, stuff like that. And so we've been exploring how AI can help turn visit transcripts into structured notes and action items so that the detailers can spend less time on that documentation and more time on actually taking what they promised in the visit and actioning it so that they can continue to support the clinician.

Anna: Have you had good feedback from the detailers in terms of using AI for these workflows, and have they said that it has reduced the time they've been using to do these kinds of admin tasks?

Victoria: Yeah, I think the biggest takeaway from the team so far is the visit follow-up and documentation piece. I can go into a little bit more detail about that one. We essentially,

obviously get permission to get a transcript of the visit. And that typically is the virtual visits where you have Microsoft Teams where you can get a transcript from. And then we put that and a prompt into a secure ChatGPT or Copilot, whatever a team has, and it just helps to kind of build out a summary based on the fields that we have in our own documentation platform.
And then pulls out those things like: Okay, what are the resources that I promised to provide? What are the questions that I needed to look more into? That sort of thing. So it definitely saves time there.

And then similarly, we have an automated booking process that we've put into place, which really helps with the back-and-forth of scheduling over email. And then a few other fun things that maybe don't necessarily save time, but just kind of add to the experience of, for example, prepping for a new topic and doing that pre-reading.

Anna: What other fun things can you think of or share with us?

Victoria: Yeah, so one example that we've been exploring for the last two topics that we've done, we're lucky enough to have access to NotebookLM, which is a Google AI product. What we've been doing is creating podcast summaries—which is very on-brand for what we're talking about right now: AI in a podcast—of the pre-reading. So, we have a lot of evidence that goes into a topic, so our detailers need to review a lot of that, and although like reading through the evidence and understanding it doesn't change, we've been using NotebookLM to create podcast-style audio summaries so that the detailers have just another way to engage with that material, particularly if they're more auditory learners or they like to listen to podcasts when they're driving to and from visits, that sort of thing.

And it just takes a piece of that pre-reading material and it puts it into essentially a fake podcast where two people are talking about that piece of material in a more conversational format. Which it's kind of freaky. It sounds really real, two people just kind of chatting about something, a topic that they're both kind of aware of and understand and have things to say.

But I think it's particularly interesting for detailing in that this evidence then goes into academic detailing visits, which essentially are just conversations between a detailer and the clinician. So I think it actually kind of helps prepare the team to chat about evidence in that format. So yeah, pretty neat.

Anna: Yeah, that is really neat. And a really cool way to help people who like to learn in different ways than just reading. So yeah, for diverse learners, that's great.

So, we talked about this a little bit, but detailers work a lot, we know, with evidence and information. How might AI help detailers synthesize information, but still ensure that the evidence they share with clinicians is accurate, is relevant, is trustworthy? So we talked a bit about how they might synthesize that information, but how do we ensure that it's correct?

Victoria: Yeah, and I think that's something that we're all struggling with to make sure that we're

not replacing quality with efficiency. And so I think AI can be really helpful when you're working with a large volume of evidence. So we've used tools like ChatGPT and, again, NotebookLM to help work through the evidence base. And so on the planning side of things, we've used it to develop pre-reading assignments that are a little bit more specific. So instead of saying, "Read these three guidelines and these 10 systematic reviews," we have kind of put all of the evidence base and a prompt to kind of pull out: What are we actually hoping to learn from these pieces of evidence?

And it'll help sort through like: Okay, these sections of the guideline are relevant to this key message. These sections are relevant to this key message. This whole section is outside of the scope of your topic, so you don't have to worry about that, but it's there for reference if you do need to go reference it.

And so, that's kind of one way. And then similarly, I think the detailers can have that, you know, they can use prompts and put evidence into ChatGPT or NotebookLM and ask it to summarize things for them, but there just always needs to be that human review, to check that the outputs are accurate against the original sources, make sure that evidence is being represented accurately, and ensure that the information is relevant to the campaign and the clinicians that we're supporting. So again, maybe it's talking about a topic in an acute care setting. Well, that isn't relevant for us because we're talking about primary care. So you need to have that human review, which I think is becoming a very well-known understanding when using AI.

Anna: Yes, agreed. And of course, they always have that message at the bottom of an AI prompt that you really need to review the information.

What are some of the other challenges or risks that detailing programs should be thinking about before incorporating AI into their work?

Victoria: Yeah. So, I think transparency is one of the big things. So just kind of being honest and open about when and where AI is being used and how it's being used. Whether that's putting a disclaimer on a slide, or on a piece of material, or as part of the conversation. I think that's a big one, because everyone knows that everyone's using AI, but as long as you're honest about it and I think that's a really big confidence boost, not even in academic detailing, but just in general.

And then privacy and confidentiality are big ones as well, particularly in healthcare. So, if you're using AI to support documentation or working with transcripts of a clinician visit, you need to think carefully about what information you're sharing, what tools you're using, whether those tools have been approved for that purpose, and getting consent is also really important, especially when transcribing or recording a conversation.

And at CEP, we've done a lot of work to think about the different agents, and we have more secure accounts that we use so that we're not putting information out into the ether that shouldn't be out there. Those things are pretty important. And also being intentional about how you're using it. You don't need to use AI for everything, but using it in ways that are actually going to

be helpful I think is really important. Understanding the risks, having safeguards in place, all of those things work together to make AI use a little safer.

Anna: Yeah, no that's great, Victoria, and that's really helpful context, especially as we're thinking about how to use AI specifically in healthcare. A couple more questions I have for you: How do you see AI complementing the human relationship, which is the heart of AD, rather than replacing the role of the detailer? This comes up all the time. People are concerned about it, so I'd love to hear your take on it.

Victoria: Totally. And I think this comes back to, like you said, what academic detailing fundamentally is about. It's about that human relationship with a clinician, understanding their needs and their challenges, and having meaningful conversations grounded in evidence. And AI can't replace that human connection, or the judgment that a skilled detailer brings to a conversation, or that a skilled clinician brings to their patient care.

So, as we've kind of been chatting about the ways that we've used AI in academic detailing, where I see it adding the most value is really helping to take some of that admin work off of the detailer's plate, so that they can just really focus on that visit and the connection that they're making, and the support that they're providing for their clinician. So not replacing that piece at all, just making it more of the focus, really.

Anna: That's a great perspective on it. I want to talk a little bit about your upcoming presentation at the conference. So, you're leading a 90-minute workshop with one of your colleagues, and it will include opportunities for participants to work directly with examples and explore AI in real-world detailing scenarios. What can attendees expect to actually do during the session?

Victoria: Sure. Well, I do need to give credit where credit is due, and my colleague Brooklyn is really the mastermind behind this whole workshop session, and is also one of the people doing most of this AI and automation work for CEP. So props to Brooklyn, and also our detailers for bringing some of these ideas to light, of how we could use AI and automation to support them best. So I have to plug them a little bit here.

But in the session itself, what attendees can expect, we're going to start by kind of giving some examples of how CEP is using AI within our own academic detailing program, just to give a little bit of a sense of the different ways these tools can support the work that we all do.

And then we're going to get participants to try out a little bit of AI use themselves. So, we're going to work through a practical scenario related to that documentation and follow-up piece that I mentioned—where we use an AI tool, whether it's Copilot, ChatGPT, Claude—to input a transcript of a visit and try to come up with the documentation points, follow-up items, to get people kind of experienced in what that looks like, both with using their own prompt, and then we'll provide a prompt as well, which we've worked to develop.

And then we're going to wrap up with a group discussion about how the experience went: what

people found with using AI, some of the challenges that they faced, and then talk about some important considerations, like privacy and consent, potential for errors, and the need for human review.

And hopefully by the end, get some hands-on experience to be a little bit more comfortable if people haven't really dove into using AI yet, but also just understand where the opportunities lie, because sometimes I think because academic detailing is so relationship-based, there might not be a clear use for AI, or people might be scared that it is going to replace that human connection. But there are so many things that can be done with AI that will not impact that human connection. So yeah, a little bit of inspiring and confidence building, hopefully.

Anna: Ooh, fun! That sounds like a great session, and I hope that our listeners are able to join. I hope I can join, too, when I'm there.

So I want to talk about and wrap up looking ahead. So what do you think AI could make possible for academic detailing programs over the next few years? And part two of that question: What do you hope people leave the NaRCAD2026 conference thinking differently about? So both of these are just looking forward to the world of AD and AI.

Victoria: Yeah, I mean it's so hard to say. AI has changed so quickly, and technology has evolved so quickly over the last few years, so who knows what the next few years will bring? But I think AI could create a lot of opportunities for academic detailing programs again to improve efficiencies and service delivery, whether that's supporting with evidence synthesis, developing training materials, or even the materials that are used during academic detailing visits, and making documentation and follow-up easier. There's a lot of ways for these tools to help reduce some of the administrative burden involved in delivering a program like this, and help us make better use of our resources.

I think what I'd really like people to take away from the conference, and particularly around AI, is to think strategically about where AI could make a difference in your own program, rather than feeling like you need to use it just because it's becoming so prevalent. But at the same time, it's okay to experiment and try things out, and figure out what works for your program, because I think we're all learning, and not every application is going to be the right fit for each program. We're all so different, we all have such different focuses, different sizes, different expertise.

And then last but certainly not least, I think we have a real advantage of having such a strong academic detailing community, largely thanks to NaRCAD. So having the opportunity for us to all come together and connect and learn from each other depending on where people are at in their AI journey, I think that's super helpful. And hopefully this conference and talking about AI will help to kind of identify those people who have some experience, whether that's us or other groups, and how we can kind of connect following the conference and continue to support each other.

Anna: Yeah, beautifully said, Victoria. And you know, every use of AI is going to be different across the programs, as you said, so having that ability to experiment is going to be huge, and I

like what you said about your workshop description. It's really about confidence building, too. It's about having the confidence to use AI and try different things and new things as the world evolves.

So, thank you so much for joining us today, Victoria. For all our listeners, please join us at NaRCAD2026 on November 12th and 13th in Boston, Massachusetts, at the Fairmont Copley Plaza. You can learn more about CEP's work if you join us, as well as hear from other detailing programs from across the globe. We'll cover topics from misinformation, inclusive and patient-centered care, improving communication skills, program sustainability, and you'll hear real-world program experiences. So, we hope to have you join us. I'll put a link in the podcast description where you can learn more about the conference and register. And thank you again, Victoria, so, so much for joining us today.

Victoria: Thank you, I can't wait for the conference.

Anna: We can't either. See you there!