Planning, Conducting & Following up Successful HEL Programs

LEADER'S GUIDE

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Note to Facilitator:

The following is a list of materials and supplies you and your participants will utilize during this workshop.

EQUIPMENT
- Overhead projector
- Computer/Proxima

SUPPLIES
- ☒ Flipchart Markers
- ☒ Masking Tape
- ☒ Push Pins
- ☒ Blank Flip Pads (.)
- ☒ Flipchart Stand (

OVERHEADS
- HEL Timeline
- Marketing Information Summary
- Program Introduction Guidelines
- Communications Concepts
- Program Introduction...
- Communications Concepts
- Good Opening Questions
- Post-Program Results

PRE-PREPARED FLIPS
- Lessons Learned
- Hot Topic Inventory
- The "Right Kind" of Call
- Physician Needs and Participant Centered Objectives
- Facility Selection and Evaluation
- Lessons Learned 2
- Monitoring Program Information
- Monitoring Positive Audience Behavior

PARTICIPANT MATERIALS/ HANDOUTS
- Completed observation form (one page; from self-study program)
- Completed Evaluation form (three pages; from the self-study program)
- Participant workbook
- Transition Role Cards

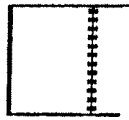
OTHER
- Participants must have submitted completed Evaluation and Observation forms prior to class.

The following is an explanation of the icons used throughout this guide.

Activity or Exercise requires use of blank flipchart

Small group Activity or Exercise

Group discussion


Workbook Reading or Exercise

Lecture

Activity or Exercise based on flipchart material

Activity or Exercise requires use of overheads

Activity requires voluntary sharing of information or experience

Demonstration of how to access computer information

Activity requires handouts

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OVERVIEW

The purpose of this workshop is to provide representatives with feedback and reinforcement on their observations of HEL programs facilitated by others, and for HEL programs they have planned, implemented and followed up.

OBJECTIVES

1. Given the name of a planning, implementation or follow-up task, participants will be able to:
   - Describe the procedures (i.e., the sub-steps) required to carry out the task.
   - State the rationale for following these prescribed procedures according to standard.
   - Identify the Merck resources available to carry out the task/procedure.
2. Self-assess their effectiveness in carrying out all tasks/procedures to plan, implement, and follow-up on HEL programs, using an Evaluation form.
3. Use other attendees as a "help group" after the workshop as a resource for topics/ideas/best practices.

MODULE FLOW

	Topic	Objective	Time	Learning Method
Workshop Introduction	Set workshop agenda	• Establish the norm that participants "drive" the class. • Emphasize the importance of application activities (from self-study). • Gauge the strengths and needs of attendees. • Establish a norm of open communication and involvement.	20-30 Minutes	▪ Class activity
Program Planning	Selecting a topic	• Review procedures for accessing approved HEL topics. • Compile an "inventory" of "hot topics." • Emphasize how identification of topics from physician comments is one indication that the rep is making the "right" type of calls.	20-30 Minutes	▪ Class activity

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	Setting program objectives	• Explore the relationship between identifying participant-centered program objectives and making effective calls on physicians. • Provide practice in identifying participant-centered objectives. • Discuss how to determine if participant-centered objectives have been accomplished.	20 Minutes	▪ Trainer-led discussion ▪ Class activity
	Selecting participants	• Review procedures for selecting participants. • Re-emphasize the importance of involving key physicians in the planning of the HEL program.	20 Minutes	▪ Class activity ▪ Demonstration
	Selecting a speaker.	• Review procedures for selecting and preparing a speaker	15 minutes	• Class activity • Demonstration
	Selecting a facility.	• Emphasize the importance of selecting and preparing a facility and the factors that should be considered.	15 minutes	• Class activity
Program implementation	**Lessons Learned**	• Review how implementing a program gives the rep feedback on his/her planning activities.	15-20 minutes	• Small group
	Speaker Introduction	• Review the program introductions made by participants for the HEL programs they conducted. • Provide a framework (i.e., a skill model) for planning speaker introductions and self-evaluating the effectiveness of these introductions	15 minutes	• Role play
	Communication Concepts	• Demonstrate that communication--both one-to-one and group--is at best an imperfect process, one prone to generating false assumptions.	10 minutes	• Class activity
	Monitoring program information	• Emphasize the importance of monitoring a program's subject matter (i.e., the degree to which it deals with audience needs).	10 minutes	• Class activity
	Monitoring Audience Behavior	• Identify audience activities/behavior that indicate interest, attention, and learning.	10 minutes	• Class activity

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	Guiding Discussions	• Transition from non-business to business discussions. • Differentiate between keeping discussions business-related and overtly "Selling." • Emphasize the dangers of overtly "selling" during an HEL program.	20 minutes	• Small group activity • Trainer-led discussion
Follow-Up	**Post-program follow-up**	• Provide feedback to participants on their post-program follow-up activities. • Emphasize the importance of these activities. • Examine the relationship-building aspects of planning, implementing, and following up an HEL program.	45 minutes	• Trainer-led discussion
		Maximum Total Time:	4 hours, 10 minutes	

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About participants: Prior to this workshop, participants should have completed a self-study program and carried out a series of on-the-job *application activities*, specifically:

- Observed an HEL program and completed a one-page observation form, and
- Planned, conducted and followed up on an HEL program and completed a three-page Evaluation form.

These activities and completed forms are "tickets for admission" to this workshop. They are essential for a meaningful learning experience. Attendees must submit these completed forms to program trainer several days prior to the workshop.

Note: You should carefully review both forms prior to this program. They are included in the front of the Appendix.

About the design of this workshop: Because learners will have carried out the application activities mandated in the self-study precursor program, they will be highly motivated to contribute to and *"drive"* this classroom portion of the program. Specifically, they are expected to:

- Share experiences and insights about the on-the-job application activities mandated in the self-study program.
- Get feedback on these activities and have questions answered.
- Advance their knowledge through access to a subject matter expert and interaction with other participants.
- Apply what they learn in this session back on the job.

Thus, this workshop is a continuation of the learning and application process begun with the self-study program. Equally important, it is a validation of the prior program and its application activities. Conversely, failure to "honor the assignments" will send a negative message about management's commitment to the earlier program and interrupt the learning and application progression.

The sequence of the topics covered in this workshop generally follows the timeline of planning, implementation and follow-up actions presented in the self-study program. However, participants should exercise significant control over the workshop. Therefore, many of the topics and learning activities presented in this leader's guide should be considered "potential" elements of the workshop that will be covered when participants have applicable questions and concerns, successes or cautionary tales to share.

About your role: You are expected to be a meeting facilitator and subject matter resource who responds to the questions, concerns and needs of the class. While you may focus class attention on a particular topic, how you deal with the topic and the amount of time you devote to it depends on the class.

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Facilitation Tips

Teaching isn't telling. Learning isn't listening.
Learning is DOING.

Early in the workshop...

- Tell the class that everyone is expected to participate actively. (i.e., You are not an entertainer.)
- Initial workshop activities should establish the norm of participant involvement and control of the workshop.
- Reinforce (i.e., make positive comments about) participant contributions. Avoid negative comments on honest contributions. The only "sin" is not to try or not to take the workshop seriously.
- Particularly early in the workshop, exercise care in discussing mistakes, errors or other deficient performance.

When setting an agenda...

- Guide participants to consider successes they wish to share as well as questions, needs or weaknesses they want to discuss.
- The group should consider both knowledge issues dealing with the self-study program and performance issues dealing with planning, facilitating and following up on an HEL program.

To encourage open and honest communication...

- When possible, get the group's approval/consensus on the topic you wish to cover next.
- Ask what participants would do *"differently"* in the future, not necessarily what they did wrong.
- When you ask for volunteers (as opposed to requiring everyone to participate), try not to skip anyone who wishes to contribute.
- Build on the positive aspects of performance (i.e., successes) rather than focusing on negatives.
- For very demanding questions for which participants may feel insecure as to whether the objectives are "correct," always ask for volunteers.

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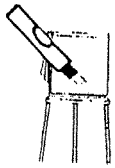
Program Expectations and Logistics

This workshop is designed to answer your questions, allow you to share your experiences and advance your knowledge in planning, implementing, and following up HEL programs. All of you have conducted at least one HEL program and many of you have observed HEL programs conducted by others. You have also completed the self-study experience program and carried out a series of "application activities" mandated by that program and discussed them with your business manager. In other words, you are already knowledgeable about conducting HEL programs.

Therefore, you are expected to "drive" this class, to take an active role, to make sure this workshop meets your needs, and ultimately to take responsibility for your own development. For the next four hours I am your resource and it is your job to make effective use of my expertise and the expertise of your colleagues.

Time: 20-30 minutes

At a Glance: Topic	Instruction
Set workshop agenda 	■ **ASK** each participant: "What do you want to accomplish in this workshop?" (**DIRECT** participants to respond after they have reviewed the completed Evaluation and Observation forms they brought to class.) **WRITE** all responses on the FC: "To Be Accomplished." **POST** these responses where they can be seen throughout the workshop.
	■ **REFER** to the FC and **SAY:** "While I will try to ensure that the next 4 hours meets these goals, it is the responsibility of each person here to "make it happen."

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Topic	Instruction
Set agenda, continued	■ **DISPLAY** OH/Workbook page: "HEL Program Timeline." ■ **SAY:** "While, in general, this workshop will follow the timeline sequence of actions presented in the self-study program, I would first like to get a rough idea of your experiences in observing and conducting HEL programs."

HEL Program Timeline

Six weeks before an HEL program...
1. Select a program topic.
2. Set program objectives.
3. Determine program type.
4. Select participants.
5. Select a speaker.
6. Agree on a date and time.

↓

Four to six weeks before...
1. Select and book the facility.
2. Prepare the speaker.
3. Send out invitations.
4. Market the program.

↓

One hour before the program...
1. Review preparations and program events with owner/manager/event coordinator.
2. Review program with speaker.
3. Work the room.

During the program...
1. Introduce the program.
2. Monitor the presentation.
3. Gather post-program reactions
4. Settle up.

↓

After the program...
1. Record your observations.
2. Complete paperwork.
3. Follow up with the speaker.
4. Follow up with attendees.
5. Evaluate program success.

DISPLAY the OH as you do the following...

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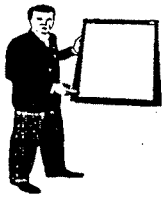
Topic	Instruction
Set agenda, continued	■ **ASK:** "What are our overall strengths and needs in planning, facilitating and following up on HEL programs?" **SUGGEST** that the group refer to page two of the Evaluation form they completed prior to class. ***Note:*** Ask what participants would do *"differently"* in the future, not necessarily what they did wrong. Particularly early in the workshop, exercise care in discussing mistakes, errors or other deficient performance.
	■ **RECORD** participant responses in the appropriate columns of the FC: *"Lessons Learned."* ***Lessons Learned*** **What to duplicate** — **What to do differently** **1.** — **1.**
	■ You may **POINT OUT** any "linkages" between these responses or between those from the previous topic. (E.g., One learner's "do differently" lesson may match what s/he wishes to accomplish in this workshop. Or one participant may place a given activity in the "duplicate" category--i.e., it is a strength--and another has categorized it as "do differently.") ■ **RECAP** both FC columns by asking: "What are our overall strengths and needs?"
	■ **ASK:** "In light of our strengths and needs, which of the steps on this HEL Program timeline do you feel are most important for us to cover in this workshop?" (This is the OH referred to on the previous page.) ***Note:*** Guide participants to consider successes they wish to share as well as questions, needs or weaknesses they want to discuss. The group should consider both knowledge issues dealing with the self-study program and performance issues dealing with planning, facilitating and following up on an HEL program. ■ **HIGHLIGHT** appropriate timeline steps on the OH, using a colored marker.

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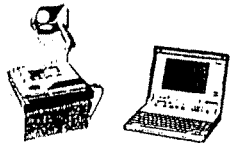
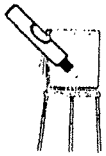
The self-study program made the point that if you're making "the right kind of call," you should already have an inventory of topics that appeal to the physicians you call on. Thus, your ability to identify your own topics is one way to diagnose your effectiveness in dealing with them.

Time: 20-30 minutes

Topic	Instruction
Selecting a topic	*Note:* Unless otherwise indicated, the time devoted to this and all subsequent topics depends on the needs and interests of participants. ■ **ASK** each participant, one at a time: "What were the topics of the HEL programs you have conducted or observed?" "How was the topic selected?" "Who assisted you in making this selection?" ■ **ASK:** "Does anyone have any questions about how to use Insight to access HEL-approved topics?" If there are any questions or problems the class wishes to discuss...
	■ **DEMONSTRATE** and **EXPLAIN** all procedures, using Proxima or OHs of relevant Insight screens you prepared beforehand. Do any or all of the following: • Perform and explain all steps, including why steps are important and common errors often made. • Confirm understanding by asking questions (e.g., "Do you understand why I did that?" "What did I just do?" What do I do next?") • Possibly direct the participant who asked the question or doesn't understand to carry out one or more procedures. • Direct participants who had problems/asked questions to take notes.
	■ **ASK:** "What are some additional topics that your physicians have talked about, that have appeared in the recent literature, or that other reps have told you are "hot" right now?" ■ **RECORD** participants' responses on the prepared FC/Workbook page: *"Hot Topic Inventory."*

Hot Topic Inventory

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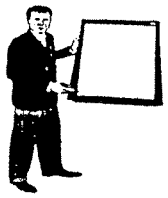
Topic	Instruction
Selecting a topic, continued	*Note:* In essence, this segment asks participants to describe "the right kind of call" referred to in the self-study program.



- For several of these "Hot Inventory" topics that were suggested by physicians, **ASK** the person who volunteered it:
  - "What was the context in which the physician's suggestion occurred?" (i.e., "What were you and the physician talking about?")
  - "What is your past history with the physician?" Your relationship with the physician?"
- Then **ASK** the entire class:
  - "What did this conversation tell the rep about the physician's needs, concerns, goals, etc?"
  - "What did this suggestion and its context indicate about the physician's opinion of the rep?"

- **SUMMARIZE** by reviewing the OH/Workbook page: *"The Right Kind of Call."*

The "Right Kind" of Call

- **Two-way dialogue (not just a product feature and benefit lecture).**
- **Physician's needs, problems, goals discussed.**
- **The physician feels free to speak his/her mind (i.e., s/he perceives the rep to be customer-oriented).**
- **The physician perceives the rep to be technically competent/knowledgeable.**
- **The physician perceives the rep to add value.**

- **ASK:** "What questions do you have regarding how topics are selected?"

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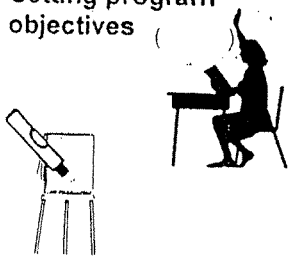
In order to focus your planning efforts, to generate physician interest in the program, and to ultimately evaluate its success, you need to set program objectives. As you learned in the self-study program, your objectives should be both Merck-centered and participant-centered.

Time: 20 minutes

Topic	Instruction
Setting program objectives 	■ **ASK:** "What are some of the Merck- and participant-centered objectives you established for your HEL programs?" ***Note:*** Because this is demanding and many participants may be insecure as to whether their objectives are "good" ones, use volunteers. ■ **WRITE** these objectives on the FC: *"Program Objectives."* ■ **ASK** each of these volunteers: • "How did the HEL program topic help achieve Merck's business objectives?" • "How did the topic appeal to your physician needs, problems, goals?" (i.e., "Explain why the topic was of interest to physicians.") • "Do you feel the HEL program achieved its objectives? Why? Why not?"

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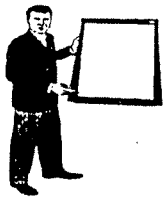
Topic	Instruction
Setting program objectives, continued	



- **DISPLAY** the FCs/Workbook pages: *Fact-Finding Questions"* and *"Needs and Objectives"* as shown below.
- **SAY:** "You can't set participant-centered objectives without a thorough understanding of your physicians' needs. This first flip chart lists some of the questions you should ask yourself to identify needs that apply to an HEL program.

Fact-Finding Question
❖ ***What has the physician stated he/she wants?***
❖ ***What has the physician statedhe/she doesn't want?***
❖ ***What has the physician said would help his patients?***
❖ ***What does the physician want to avoid with his patients?***
❖ ***What are competitors and their products doing well?***
❖ ***What are they doing poorly?***

Physician Need	Participant-Centered Objective

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Topic	Instruction
Setting program objectives, continued	■ **ASK** the following questions and **WRITE** responses in the "physician need" column of the FC: • "What is something your physicians say he/she *want*?" • "What is something your physicians say he/she *don't* want?" • "What is something your physicians say would *help* their patients?" • "What is something your physicians say he/she want to *avoid* with their patients?" • "What is something your physicians say a *competitor* or a competitive product is doing well? Doing poorly?" • "What is something your physicians say he/she want to *learn more about*?" ■ **REFER BACK** to an FC entry (i.e., need) just volunteered ■ **ASK:** "What is an HEL program objective for this need?" ■ **WRITE** responses in the "participant-centered objectives" column of the FC. ■ **SUMMARIZE** this segment by saying: "When you set participant-centered objectives for an HEL program based on important physician needs, you increase the likelihood that you will achieve good attendance at the program, it will improve your relationship with your physicians and ultimately accomplish Merck-centered business objectives."

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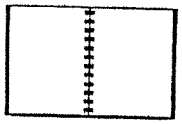
Time: 20 minutes

In order to produce economic results, your HEL program must not only attract physicians, but attract the "right" physicians, those whose practice has significant economic potential. As you learned in the self-study program, Merck offers significant resources to identify such physicians. However, you also exercise considerable control on attracting them.

Topic	Instruction
Selecting participants	■ **DIRECT** the class to refer to the Evaluation forms they completed prior to class ■ **ASK** volunteers the following: • "How were key physicians selected for your HEL program?" • "What, if any, professional relationships exist between attendees? • "What percentage of attendees were A physicians? B+ physicians?' • "What percentage of those who were invited actually attended the program?"
	■ **ASK:** "Does anyone have any questions about how to use Insight and the Merlin views to identify high potential physicians?" If there are any questions or problems the class wishes to discuss...
	■ **DEMONSTRATE** and **EXPLAIN** all procedures, using Proxima or OHs of relevant Merlin views you prepared beforehand. ■ **DIRECT** participants to complete all six entries on the Workbook page: *"Marketing Information Card."* ■ **TELL** participants to refer to any notes they brought with them and the *Marketing Opportunities Checklist* form completed in the self-study program.

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Topic	Instruction
Selecting participants, continued	■ **ASK** each participant, one at a time: "What were the two attendance percentages you entered on the card?" ■ **WRITE** these figures in the appropriate boxes of the OH: *"Marketing Information Summary."* (You can enter information for as many as ten participants on this overhead.)

Marketing Information Summary

	Overall attendance percentage	Attendance % of physicians involved in planning
1	%	%
2	%	%
3		

■ **ASK:** "What can you conclude by examining all of the percentages we have listed on this flip chart?"

■ ***Response:*** The attendance percentages of the physicians involved in planning should be higher than for those who were not involved.

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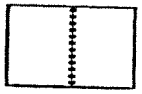
The speaker you select is often as important as the topic. Again, Merck has significant resources to help you select a speaker. Preparation of the speaker also contributes significantly to his or her success.

Time: 15 minutes

Topic	Instruction
Selecting a speaker	■ **DIRECT** participants to refer to the entries they completed on the HEL program Evaluation form during the self-study. **ASK** several volunteers to answer the following questions: • "Who helped you in selecting the speaker for your HEL program and what criteria was used?" • "Did you or someone else prepare the speaker? What topics were discussed?" • "What was your ultimate evaluation of the speaker that you entered on the Evaluation form?"
	■ **ASK:** "what questions do you have about using Insight accessing the HEL department's speakers' bureau or completing the speaker's request form?" If there are any questions or problems the class wishes to discuss... ■ **DEMONSTRATE** and **EXPLAIN** all procedures, using Proxima or OHs of relevant Insight screens you prepared beforehand. Need list and overheads(or PPT) of Insight screens necessary for trainers to review- we don't have the Insight in our computers to bring up from our own
	■ **DIRECT** the group's attention to the "Resolution to Common Problems/Speaker's Request Form" from the HEL Department's *Rules of the Road* binder, which has been included on pages 8 -11 of the Participant Workbook. You do not have to review these pages now, just point them out to the class for future reference.

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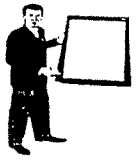
Time: 15 minutes

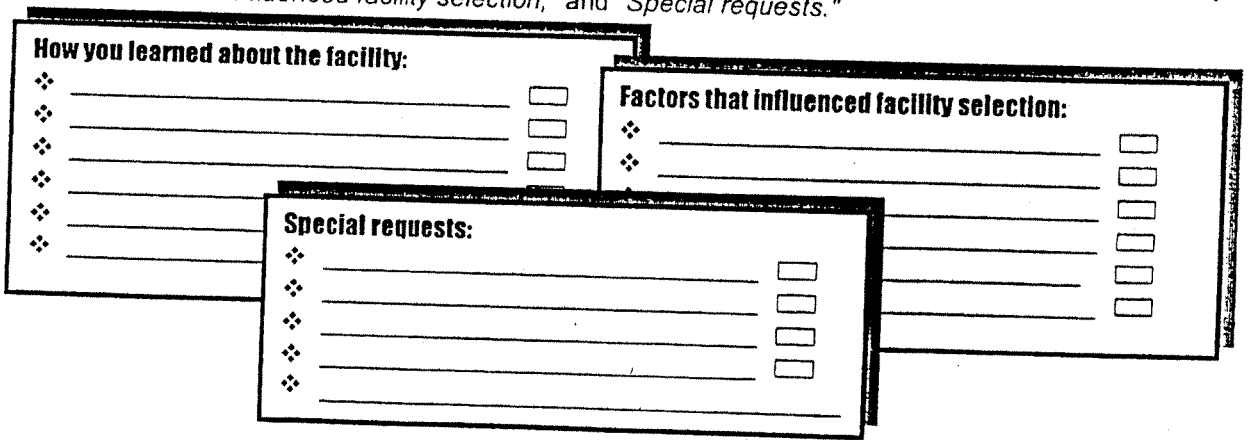
Most of us know how much a facility can enhance or detract from our enjoyment of an event. Your experience in observing and conducting an HEL program has probably given you additional insight into the preparation required to provide a pleasant learning atmosphere. In the next few minutes we'll do a quick profile of your experiences with the facility you selected.

Topic	Instruction
Selecting a facility	*Note:* Keep this discussion somewhat general in nature. Try to avoid extensive discussion of specific examples or "lessons learned." This type of information will be generated in the next topic.

- **TELL** the class to refer to the notes they brought to the workshop and to the first page of the Evaluation forms they brought to class.
- **ASK** a volunteer:
  - "How did you learn about the facility you selected?" (Then) "How many of the rest of you learned about the facility in this way?"
  - "What factors influenced you in selecting it?"
  - "What special requests did you make?"



- **WRITE** each answer in the blanks of the prepared FCs: *"How you learned about the facility," "Factors that influenced facility selection,"* and *"Special requests."*



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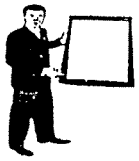
Topic	Instruction
Selecting a facility, continued 	■ **ASK** the class: • "How many of you learned about the facility in some other way?" • "Were any of you influenced by other factors in your selection of a facility? • "Did anyone have other special requests?" ■ **WRITE** each answer on the appropriate FC. ■ **PROFILE** the class by asking for a show of hands for each entry you wrote on the FC and writing the number in the appropriate box to the right. ■ Then **ASK** the entire class: "Overall, did the facility meet, exceed, or fall below your expectations?" ■ **WRITE** the appropriate participant numbers (i.e., hands raised) in the boxes to the right of this entry on the FC: *"Facility evaluation."*

Facilitation evaluation

- ❖ **Expectations exceeded** ☐
- ❖ **Expectations met** ☐
- ❖ **Expectations not met** ☐

■ **SUMMARIZE** the points raised by the class.

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Most of you probably learned a lot about the effectiveness of your planning activities when you actually implemented your HEL program and that's what we'll investigate next...

Time: 20-30 minutes

Topic	Instruction
Program Implementation: Lessons Learned	■ **DIRECT** participants to divide into small groups of 3 or 4. ■ **DISTRIBUTE/POST** one copy of the prepared FC: *"Lessons Learned during Pre-Program Checks and Implementation"* and a marker for each group.

Lessons Learned during Pre-Program Checks and Implementation

	Incidents	Lessons Learned
Topic	Positive:	
	Negative	
Participant	Positive:	
	Negative:	
Speaker	Positive:	
	Negative:	
Facility	Positive:	
	Negative:	

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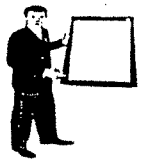
Topic	Instruction
	■ **SAY"** "In the next five minutes I want you to consider what you learned about your ***planning*** activities during your pre-program checks and during program implementation. Specifically, what did you learn about your ***planning*** for the program ***topic***, its ***participants***, the ***speaker***, and the ***facility***? To do this, on the flip chart you just received list both positive and negative incidents you encountered for each of these planning activities. For now, only fill out the 'incidents' column. Generate as many incidents as you can; don't worry if your team can't think of a positive or negative incident for every box."
	■ **ADVISE** the class when 3 and 1 minute remain. ■ In turn, **DIRECT** each team to discuss each positive and negative incident they listed. ■ When all teams have presented their incidents, **DIRECT** the class to volunteer what can be done in the future to prevent the negative incidents and encourage those that are positive. ***Note:*** Be alert for and **COMMENT** on any common threads that run through the incidents or the lessons learned. For example, does the group seem to have trouble involving physicians early in the planning of HEL programs? Did they generally do a good job in working with the facility?

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Time: 15 minutes

One important task you performed during program implementation was to introduce the speaker and the topic. As you probably learned, this step helped set the tone of the program and required careful planning and rehearsal.

Topic	Instruction
Program Implementation: Speaker Introduction	■ **DIRECT** a volunteer to re-enact the introduction s/he presented his/her HEL program. ■ **DISPLAY** the prepared OH/Workbook page: "*Program Introduction: Sequence of Events.*" ■ **TELL** the group to note each of the four overhead elements as they occur during the re-enactment.

Program Introduction: Sequence of Events

1. **Thank participants for attending.**
2. **Enthusiastically explain why the topic is important to attendees.**
3. **Introduce the speaker.**
   - **Qualifications**
   - **Your Appreciation**
4. **Explain the meeting agenda.**
   - **Meal**
   - **How/when questions handled**

Throughout your introduction, pay attention to your body language, your tone of voice, and the clarity of your message

■ After the re-enactment, **ASK** the class:

"Did __(the volunteer)____ complete the four-step sequence of events?"
"Was his/her body language relaxed and confident?"
"Did his/her tone of voice and pacing convey confidence and professionalism?"
"Was the meeting agenda clearly and thoroughly explained?"

■ **CONCLUDE** by **SAYING:** "In general, 55% of communication is accomplished by body language, 38% of communication is accomplished through tone of voice, and only 7% accomplished through the meanings of the words themselves."

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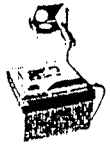
Time: 10 minutes

During the program your ongoing responsibility is to monitor the flow of information and the reactions of your audience to it. First and foremost, you do this so you can take action to improve the flow of information. As you monitor the program, keep in mind these concepts...

Topic	Instruction
Program Implementation: Communications Concepts 	■ REVIEW the OH/Workbook page: *"Communications Concepts."*

Communications Concepts

People listen poorly...

- **They assume they know what you're going to say and don't hear what you actually do say.**
- **They think about what they want to say next and don't listen to what you're saying.**
- **They hesitate to ask you to define a word they're unsure of.**
- **They generally don't ask for examples.**
- **They rarely volunteer that they don't understand a point or a concept.**

People communicate poorly...

- **They use vague or ambiguous words.**
- **They talk in abstract and general terms and don't use specific examples that illustrate what they mean.**
- **They omit key points or concepts. (i.e., They talk in a type of "mental shorthand" that has meaning for them alone.)**
- **They slip into jargon or use cliches.**
- **They don't check for understanding.**

■ SUMMARIZE the discussion by making the following points:

- Many audiences—including physicians—assume they have a better understanding of a presentation than, in fact, they do.
- Many people—and physicians—in an audience hesitate to take actions to aid their understanding.
- Many speakers—including those in HEL programs—are unaware when they are not understood and assume a higher level of understanding than, in fact, is the case.
- When monitoring an HEL program, never assume that a smile, nod, or eye contact with the speaker means that everyone understands or agrees with what is being said.

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Topic	Instruction
	■ **ASK:** "Who can volunteer examples from your HEL programs, your work experience, or from this workshop that illustrate how people listen and communicate poorly?" ■ **DISCUSS** the following: • Whether the professional representative should ever *interrupt* a presentation to ask for examples, definitions or explanations. • How the representative should pursue these clarifications later, during question and answers sessions.

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So we know that communication is an imperfect process at best. And it is your job to monitor this process to gauge participant interest and learning. In so doing, you essentially track several things at once. The first of these is the nature of the presentation's subject matter...

Topic	Instruction
Program Implementation: Monitoring Program Information	■ DIRECT the group's attention to the OH/Workbook page: *"Monitoring HEL Program Information,"* which contains the information used earlier when talking about objectives:

Monitoring HEL Program Information

What did the Program cover that your physicians say...

- **They want?**
- **They don't want?**
- **Would help their patients?**
- **They want to avoid with their patients**
- **Our competitors are doing well or poorly?**
- **They want to learn more about?**

■ SAY: "These questions helped you write participant-centered objectives. They can also guide your observations and note-taking during the program.

■ ASK any or all of the following: "What is an example from your HEL programs in which the speaker, the discussion, or the materials covered...

...Something your physicians have said he/she want?"

...How to avoid something your physicians say he/she don't want?"

...Something your physicians have said would help their patients?"

...Something your physicians say he/she don't want to happen to their patients?"

...Products or services our competitors are offering that our physicians like or don't like?"

...Something your physicians have said he/she want to learn more about?"

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Time: 10 minutes

Keeping track of the topics covered in an HEL Program assumes that when an audience's needs are covered, they are likely to be interested and paying attention. Similarly, the observable reactions of participants to the speaker and his or her message indicate interest and attention. While a smile, nod, or eye contact with the speaker are not failsafe indicators, other actions are more valid...

Topic	Instruction
Program Implementation: Monitoring Audience Behavior	■ **ASK:** "What are examples of *observable* behavior that indicate that the audience perceives a program to be a valuable and interesting learning event?" ■ **WRITE** all responses on the prepared FC/Workbook page: *"Monitoring Positive Audience Behaviors."*

MONITORING POSITIVE AUDIENCE BEHAVIORS

1.
2.
3.

■ If necessary, **PROMPT** or **STATE** the following responses:

- A high percentage of the audience participates in discussions or Q&A.
- Questions and comments indicate that participants are applying program information to their own practices.
- Participants ask for clarification, explanation and/or examples.
- Participants stay around after the completion of the formal "program."
- Participants request additional information, pick up promotional material, etc.
- Participants tell you they liked the program/found it helpful.
- Participants make positive comments about the program topic, the speaker, other attendees, the facility. (All reflect on the quality of your planning.)
- Participants offer suggestions on how to improve the next program. (They care enough to offer suggestions and are thinking about the next program.)
- Participants ask technical questions (e.g., how a study was carried out).

SAY: "All of these external, observable actions are valid indications of participants' internal reactions and should be included in notes you write as you monitor the program."

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Time: 20 minutes

You can feel confident if your HEL program is generating interest-related responses from your audience and the subject matter of the presentation matches their needs. But, a good speaker, a relevant topic, and an interested audience may not be enough to insure a "successful" HEL program. You need to be perceived as an integral part of the HEL program, not merely someone standing on the sidelines taking notes. Strengthening your relationships with your physicians requires engaging in business- and program-related conversations.

Topic	Instruction
Engaging the Physician through Opening Statements and Transitioning Techniques	■ ASK: "What does it mean to be engaging?" ***Possible Responses***: Get someone's attention and involvement in a discussion, possess charisma or charm, ease in developing rapport or conversing with another. ■ **ASK:** "Reflecting on some HEL programs you've attended, what have you or any of your colleagues said or done to be engaging with physicians?" ■ **ASK**: "When might you attempt to engage your physicians during an HEL program?" ***Possible Responses***: As physicians enter the meeting facility and you're greeting them, during cocktail hour, when introducing physicians to each other. ■ **SAY:** "Many representatives find it very challenging to be engaging." ■ **ASK:** "Why are opening questions or statements such a challenge for representatives at an HEL program?" ***Possible Responses***: Difficulty in knowing what might interest/hook a physician, representatives "clumping" to talk to each other if more than one Merck representative is present, intimidation etc, uncertainty if physician will listen to you, hard to know how to connect to physician. ■ **REFER** to OH: *"Techniques to Engage,"* and **SAY:** "Two techniques which can help you engage your physicians during an HEL program are: 1. Effective questioning to open up a discussion. 2. Smooth transitioning to refocus a conversation from non-business subjects to business subjects. ■ **ASK:** "How effective are your opening questions? Do they encourage physicians to discuss their needs and problems that are related to the program topic? What are the actual words you use?

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Topic	Instruction

- **REFER** to the OH/Workbook page: *"Good Opening Questions"* and **SAY**: "Here are some opening questions you can make before and after the presentation at an HEL program. Notice that these questions in each row are related and that questions asked before the presentation largely apply to an individual physician, while the questions in the right column apply to addressing a group."

Good Opening Questions

Before the Presentation	After the Presentation
"Many of the physicians I talk to are concerned with [problem related to topic]. Is it also a concern of yours?"	"Is [problem mentioned in presentation] a problem you're seeing out there?"
"How many of your patients does [problem] affect?"	"How many of your patients does [problem] affect?"
"How are you currently handling [condition to be discussed] ?"	"For how many of you is [mode of treatment] discussed by [speaker] a realistic option?"
"What changes are you anticipating in [mode of treatment to be covered]?"	"Based on what you've heard today, what, if anything, will you do differently?"
"What about _____ would you like the speaker to cover?"	"What else about _____ would you like to learn more about?"
"What questions about [topic] do you want answered today?"	"Dr._____, earlier you told me you wanted [speaker] to answer three questions. Have they been answered?"

- **DIRECT** each participant to select a pair of opening questions from the OH and write them to apply to the HEL program s/he conducted prior to class. After 3 minutes:
- **ASK** each participant to read aloud his/her opening questions. For each participant:
- **ASK:** "Did you feel natural and comfortable (i.e., not phony) asking the question?" Then, **ASK** the group: "If you were a physician attending a HEL program, how would you react to these questions?"

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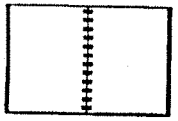
A good opening question can generate a stimulating discussion between you and the physician but suddenly you might realize that the two of you have slipped into a non-business discussion that is ultimately unproductive. On the one hand, you want to avoid the impression of making a "hard sell." But remember: even if a physician initiates a non business- or topic-related discussion, later on s/he may remember you as someone who wasted his/her time with small talk.

Many of you do a great job transitioning between products during a sales discussion. Let's test your skills in transitioning in an HEL situation...

Topic	Instruction
	■ **ASK** participants to get into trios- one will play a Physician, one a Rep and one a Recording Observer. ■ **DISTRIBUTE** *"Transition Role Cards"* to each trio. ■ **INSTRUCT** participants playing the physician to read their card and participants playing the rep to transition from the non-business topic to a business topic. ■ **REFER** to the Workbook page: *"Observer's Sheet: Transitioning."* **INSTRUCT** observers to carefully listen and jot down basics of what they heard, then rate the quality of each as either: 1- Excellent transition; 2- Average transition and why or 3- Ineffective transition and why. Trios should then brainstorm on ways the transitions could have been improved.
	■ **CONDUCT** a full-class debriefing on transitions heard, soliciting actual examples for each. **DISCUSS** those that are most effective and why. Encourage participants to jot down these transitions to test out at their next HEL program.

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Time: 20 minutes

You've demonstrated some effective skills to transition a conversation to a more business- or topic-related direction. But a "business-related" discussion at an HEL program is NOT necessarily a "sales" discussion. In fact, in this situation you must often resist your urge to "sell." You must walk a fine line to keep discussion "business-related" without jeopardizing the program's commitment to learning and to helping those physicians who attend.

Topic	Instruction
Program Implementation: Guiding Discussions	■ **ASK:** "Why can it be counterproductive for you to "sell" during an HEL program?" ■ **WRITE** participant responses on a blank FC. Be sure the following points are made: • The implicit promise of an HEL program is that it will be a helpful learning experience. Being subjected to a hard "sell" during a program violates this promise and can be interpreted as "bait and switch." • Physicians know that, while educational interests predominate, an HEL program is intended to advance the interests of Merck. Overt "selling" at this time can be insulting and seen as unprofessional overkill. • Overt selling during an HEL program can be seen as an organizational lack of confidence. The results of the studies and their applicability to patients should make the case for Merck products, not the persuasive techniques of its representatives. • Selling during an HEL program can damage relationships with attendees because it calls into doubt the rep's customer-orientation and ultimately his/her trustworthiness. • Selling can also violate government and Merck policy guidelines. ■ **SAY:** "So the question becomes how can you keep HEL program discussions on topic and business-related without being seen as *selling*. The next activities offer some suggestions for how to do this."

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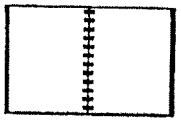
Topic	Instruction
Program Implementation: Guiding Discussions continued	■ **DIVIDE** the class into groups of 2 or 3 (to a maximum of 4 groups) and **DIRECT** their attention to the Workbook page: *"Guiding Program Discussions."*



Guiding Program Discussions

Concept: **To avoid being perceived as selling, talk about the features and benefits of a Merck product or patient needs and problems without mentioning the product name or the name of competitive products.**

Directions:

1. Discuss the reactions you would have to one of the statements below if you were a physician attending an HEL program.
2. Revise the statement according to the above concept.
3. Share your reactions and revisions with other participants.

Rep Statement	Your Reactions	Revision
1. "As a result of what you've heard today, are you more likely to use ___[Merck product]___ than ___[competitive product]___ for....?"		
2. "Wouldn't you agree that ___[Merck product]___ has a superior side effect profile for the treatment of...?"		
3. "How many of you wll use ___[Merck product]___ as your initial mode of treatment for...?"		
4. How many of your _____ patients are candidates for ___[Merck product]___?"		

■ **READ ALOUD/DISCUSS** the concept at the top of the page.

Option: If there are fewer than 4 teams, you may wish to revise the first rep statement on the workbook page to illustrate the concept. Or you may wish to discuss a rep statement that demonstrates the concept.

■ **READ ALOUD** the directions on the workbook page. **ASSIGN** each team one of the rep statements. **TELL** the group they have 5 minutes to complete the activity.

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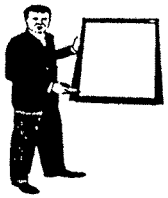
Topic	Instruction
Guiding Discussions, continued 	■ After 5 minutes, **DIRECT** each team to report their reactions and revisions to the class. ■ **REVIEW** OH: *"Good Opening Questions"* with the class. (Also page 18 of the workbook.) ***Good Opening Questions*** ❖ **"What did you find most useful in the presentation?"** ❖ **"Is _____ what you're seeing out there?"** ❖ **"Is _____ a problem you're encountering?** ❖ **"Based on what you've heard today, what will you do differently?"** ❖ **"What would you like to learn more about?"** ❖ **"How many of your patients does _____ affect?"**

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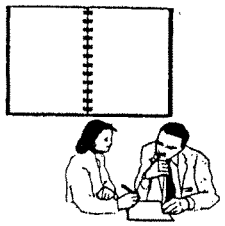
Topic	Instruction
Guiding Discussions, continued	■ DIRECT the groups' attention the Workbook page: *"Guiding Program Discussions [2]."*



Guiding Program Discussions [2]

Concept: **As much as possible, during an HEL program attendees should initiate discussion of Merck products or competitive products. Respond naturally and factually but don't "sell." Again, talk features and benefits, patient problems and needs.**

Directions:

1. Below, write several physician comments or questions that mention a Merck and/or competitive product by name.
2. For each, write a response you might make that follows the above concept.

Physician Statement	Rep Response
1.	
2.	

- **READ ALOUD/DISCUSS** the concept at the top of the page. (Participants should remain in teams.)
- **READ ALOUD** the directions on the workbook page. **TELL** teams how many statements they should complete (1, 2, or 3). After 5 minutes:
- **DIRECT** each team to report their reactions and revisions to the class.

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Time: 45 minutes

Following up after your HEL program includes two interrelated activities: First, you are using the program to continue your systematic relationship-building with attendees. Second, you are measuring the results of the program.

Topic	Instruction
Program Follow-up	■ In turn, **DIRECT** each participant to share his/her measurements of post-program activities and results (i.e., what they wrote on page three of the Evaluation form). These measurements should consist of both six percentage figures, which you record in one column of OH: *"Post-Program Results,"* and evidence/examples, which the group discusses. ***Note:*** There are 10 columns in the OH, enough to record percentages for 10 participants.

Post Program Results

	1	2	3	4	5
1. % of attendees who made positive comments about the program:	%	%	%	%	%
2. % of attendees with whom you have discussed topic(s) related to program:	%	%	%	%	%

■ When everyone's percentages have been entered on the overhead, **REVIEW** the results of the HEL programs participants have conducted.

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Topic	Instruction

- **ASK:** "How does planning, implementing and following up an HEL program enable you to demonstrate that...
  - ...you are competent, knowledgeable and professional?"
  - ...you have access to valuable information resources?" (i.e., You are backed up by Merck.)
  - ...you are truly concerned with the needs of your physicians?" (i.e., You place their needs on a par with your own/with Merck's. You're not always ""selling.")
  - ...you are dependable?" (i.e., You deliver what you promise. Your actions match your words.)

  Note: All of the characteristics listed in these questions are based on the how a salesperson with a strong customer relationship is perceived by the customer.

We've covered a lot of ground today, more than can be summarized quickly. In any event, it's your job to summarize this workshop...

- **ASK** each participant: "What is the single most important thing you learned today?"
- **WRITE** these responses on the FC.
- **ASK** each participant: "What did you say you wanted to accomplish today and did you meet this goal?"
- **WRITE** these responses on the FC.
- **SAY:** "This workshop should also have shown you how valuable it is to share your experiences with your colleagues and to hear about their successes, problems and insights. I encourage you exchange business cards to facilitate easy contact each other over the next year. In the long run your colleagues may prove to be more most valuable resources in planning, conducing and following up on HEL programs."

  Note: At this time, you may set up a conference call in 4 to 6 weeks for all participants to discuss their HEL program efforts.
- **THANK** the group for their hard work and wish them luck on future HEL programs.

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APPENDIX

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To Be Accomplished

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Lessons Learned

What to duplicate

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

What to do differently

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

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HEL Program Timeline

Six weeks before an HEL program...

1. Select a program topic.
2. Set program objectives.
3. Determine program type.
4. Select participants.
5. Select a speaker.
6. Agree on a date and time.

Four to six weeks before an HEL program...

1. Select and book the facility.
2. Prepare the speaker.
3. Send out invitations.
4. Market the program.

One hour before the program...

1. Review preparations and program

During the program...

1. Introduce the program.
2. Monitor the presentation.
3. Gather post-program reactions.
4. Settle up.

After the program...

1. Record your observations.
2. Complete paperwork.
3. Follow up with the speaker.
4. Follow up with attendees.
5. Evaluate program success.

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events with owner/manager/event coordinator.

2. Review program with speaker.

3. Work the room.

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Hot Topic Inventory

1.

2.

3.

4.

5.

6.

7.

8.

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9.

10.

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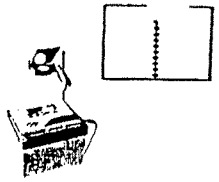

The "Right Kind" of Call

- Two-way dialogue (not just a product feature and benefit lecture).
- Physician's needs, problems, goals discussed.
- The Physician feels free to speak his/her mind (i.e., s/he perceives the rep to be customer-oriented).
- The Physicianperceives the rep to be technically competent/knowledgeable.

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Program Objectives

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Physician Needs and Participant-Centered Objectives

	Need	Objective
❖ ***What has the*** **Physician** ***stated he/she wants?***		
❖ ***What has the*** **Physician** ***stated he/she doesn't want?***		
❖ ***What has the*** **Physician** ***said would help his/her patients?***		
❖ ***What does the*** **Physician** ***want to avoid with his /her patients?***		
❖ ***What do competitors and their products do well?***		

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❖ ***What do he/she do poorly?*** ❖ ***What does the* Physician *want to learn more about?***		

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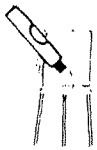

Fact-Finding Questions

- *What has the physician stated he wants?*
- *What has the physician stated he doesn't want?*
- *What has the physician said would help his patients?*
- *What does the physician want to avoid with his patients?*
- *What do competitors and their products do well?*
- *Do poorly?*
- *What does the physician want to learn more about?*

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Physician Need	Participant-Centered Objective

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Marketing Information Card

Refer to any notes and forms you completed during the self-study program to enter the following information.

Number of physicians invited:

Number of physicians attended the HEL program:

Attendance percentage:

Number of physicians who were involved during planning in discussion of topic, or of the speaker or of the time, date, or location of the program:

Number of these physicians who attended the HEL program:

Attendance percentage:

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Marketing Information Summary

	Overall attendance percentage	Attendance % of physicians involved in planning
1	%	%
2	%	%
3	%	%
4	%	%
5	%	%
6	%	%
7	%	%
8	%	%
9	%	%
10	%	%

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How You Learned About the Facility:

- _____ [ ]
- _____ [ ]
- _____ [ ]
- _____ [ ]
- _____ [ ]
- _____ [ ]

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Factors that Influenced Facility Selection:

- _____ ☐
- _____ ☐
- _____ ☐
- _____ ☐
- _____ ☐
- _____ ☐

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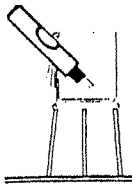

Special Requests:

- _____ ☐
- _____ ☐
- _____ ☐
- _____ ☐
- _____ ☐
- _____ ☐

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Facility Evaluation

- Expectations exceeded ☐
- Expectations met ☐
- Expectations not met ☐

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sons Learned during Pre-Program Checks and Implementation

	Incidents	Lessons Learned
About the topic...	Positive:	
	Negative:	
About participants...	Positive:	
	Negative:	
About the speaker...	Positive:	
	Negative:	

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About the facility...

Positive:	
Negative:	

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Program Introduction: Sequence of Events

1. Thank participants for attending.

2. Enthusiastically explain why the topic is important to attendees.

3. Introduce the speaker.
   - Qualifications
   - Your Appreciation

4. Explain the meeting agenda.
   - Meal
   - How/when questions handled

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Throughout your introduction, pay attention to your body language, your tone of voice, and the clarity of your message.

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Communications Concepts

People listen poorly...

- They assume they know what you're going to say and don't hear what you actually do say.
- They think about what they want to say next and don't listen to what you're saying.
- They hesitate to ask you to define a word they're unsure of.
- They generally don't ask for examples.
- They rarely volunteer that

People communicate poorly...

- They use vague or ambiguous words.
- They talk in abstract and general terms and don't use specific examples that illustrate what they mean.
- They omit key points or concepts. (i.e., They talk in a type of "mental shorthand" that has meaning for them alone.)
- They slip into jargon or use cliches.
- They don't check for

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they don't understand a point or a concept.

understanding.

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Monitoring HEL Program Information

What did the Program cover that your physicians say...

- He/she wants?
- He/she doesn't want?
- Would help their patients?
- He/she wants to avoid with their patients?
- Our competitors are doing well or poorly?
- He/she wants to learn more about?

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MONITORING POSITIVE AUDIENCE BEHAVIORS

1.

2.

3.

4.

5.

6.

7.

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8.

9.

10.

Techniques to Engage

1. Effective questioning to open up a discussion.

2. Smooth transitioning to refocus a conversation from non-business subjects to business subjects.

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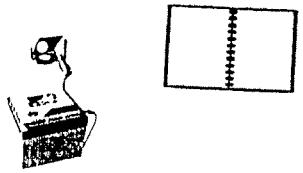

Good Opening Questions

Before the Presentation	After the Presentation
"Many of the physicians I talk to are concerned with [problem related to topic]. Is it also a concern of yours?"	"Is [problem mentioned in presentation] a problem you're seeing out there?"
"How many of your patients does [problem] affect?"	"How many of your patients does [problem] affect?"
"How are you currently handling [condition to be discussed] ?"	"For how many of you is [mode of treatment] discussed by [speaker] a realistic option?"
"What changes are you anticipating in [mode of treatment to be covered]?"	"Based on what you've heard today, what, if anything, will you do differently?"
"What about _____ would you like the speaker to cover?"	"What else about _____ would you like to learn more about?"

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"What questions about [topic] do you want answered today?"

"Dr._____, earlier you told me you wanted [speaker] to answer three questions. Have they been answered?"

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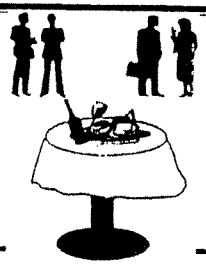
Scenario 1

Physician says: "What a nice restaurant! I hear that the food is wonderful."

Possible Rep response: "You're right, it is. I'd only arrange the best for you. I'm sure you feel the same way about your patients. When you decide to prescribe an antihypertensive, what characteristics make one product stand out from another?"



Scenario 2

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Physician says: "I love coming to this restaurant, my husband and I come here a lot. They have a great menu."

Possible Rep response: "That's one of the reason's why I chose this place. You can get boiled lobster or a venison steak. Speaking of a great menu, what concerns you about the HMO's you're dealing with, limiting your choices when choosing a specific drug therapy for a patient?"

Scenario 3

Physician says: "What a great football game yesterday. Did you see how effective Drew Bledsoe was in the 4th quarter? That guy is amazing."

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Possible Rep response:	"Bledsoe is effective on so many levels, He's a leader, you feel safe with him carrying the ball, and he's a proven winner. You know who else that sounds like? Zocor, a market leader, an eight year safety record, and proven to save the lives of your patients. Physician, what concerns to you have about have Zocor leading your team in the fight against CHD?"

Scenario 4

Physician says:	"So what plans do you have for the holidays?"
Possible Rep response:	"Well, my wife and I are going to visit my grandmother. It should be a lot of fun though I feel so bad for her. She really has advanced osteoporosis and can't travel at all. She wasn't on any treatment plan for the longest time. Physician, what do you think the reasons are that some physician don't do much about osteoporosis until it's in its advanced stages and nearly too late?"

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Observer's Sheet: Transitioning

Instructions: As you hear representative's transitioning statement/question, jot down the gist of how they move from a non-business to business discussion and rate the quality of the transition.

Scenario 1

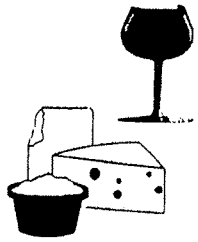
Doctor: *"What a nice restaurant, I hear that the food* *."*

Transition Statement/Question:

Rating *(circle one)*: 1 2 3

Scenario 2

Doctor: *"I love coming to this restaurant, my husb here a lot. They have a great menu."*



Possible Rep Response:

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Rating *(circle one)*: 1 2 3

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Observer's Sheet: Transitioning (cont.'d)

Scenario 3

Doctor: *"What a great football game yesterday. Did you :*
effective Drew Bledsoe was in the 4th quarter? T

azing."

Possible Rep Response:

Rating *(circle one)*: 1 2 3

Scenario 4

Doctor: *"So what plans do you have for the holidays?"*

Possible Rep Response:

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Rating *(circle one)*: 1 2 3

Guiding Program Discussions

Concept: **To avoid being perceived as selling, talk about the features and benefits of a Merck product or patient needs and problems without mentioning the product name or the name of competitive products.**

Directions:

1. Discuss the reactions you would have to one of the statements below if you were a physician attending an HEL program.
2. Revise the statement according to the above concept.
3. Share your reactions and revisions with other participants.

Rep Statement	Your Reactions	Revision

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1. "As a result of what you've heard today, are you more likely to use ___[Merck product]___ than ___[competitive product]___ for....?"		
2. "Wouldn't you agree that ___[Merck product]___ has a superior side effect profile for the treatment of...?"		
3. "How many of you will use ___[Merck product]___ as your initial mode of treatment for...?"		
4. How many of your _____ patients are candidates for ___[Merck product]___?"		

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Guiding Program Discussions [2]

Concept: **As much as possible, during an HEL program, attendees should initiate discussion of Merck products or competitive products. Respond naturally and factually but don't "sell." Again, talk features and benefits, patient problems and needs.**

Directions:

1. Below, write several physician comments or questions that mention a Merck and/or competitive product by name.
2. For each, write a response you might make that follows the above concept.

Physician Statement	Rep Response
1.	
2.	

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3.	

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Post Program Results

	1	2	3	4	5	6	7	8	9	10
1. % of attendees who made positive comments about the program:	%	%	%	%	%	%	%	%	%	%
2. % of attendees with whom you have discussed topic(s) related to program:	%	%	%	%	%	%	%	%	%	%
3. % of attendees to whom you dropped off/discussed written materials related to program topic:	%	%	%	%	%	%	%	%	%	%
4. % of attendees to whom you have improved access:	%	%	%	%	%	%	%	%	%	%
5. % of attendees whose Rx of program-related Merck products increased:	%	%	%	%	%	%	%	%	%	%
6. % of attendees for whom the quality of calls has improved:	%	%	%	%	%	%	%	%	%	%

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