Veeva
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THOUGHT STARTER SERIES

Elevating HCP Engagement Through Field Behavioral Change

New field team skills and behaviors are needed to enhance commercial execution. Here are the key considerations for embedding field behavioral change.

Veeva has a ringside seat to the shift in HCP engagement across the industry, markets, and therapy areas.[1] Our data shows that in the first quarter of 2022, field teams in Europe completed almost 25 million digital engagements and that the nature of those interactions is changing. The recent Veeva Field Trends Report[2] highlights the nature of this change, and shows that in Europe, **not all field teams are set to benefit equally [Figure 1]**.

As digital engagement increases its share of the channel mix, new behaviors are now required to remain relevant. The role of the field rep has changed in the eyes of many HCPs: top-performing field teams are those that are comfortable leveraging multiple channels so that, in effect, reps never leave the room.

KEY TAKEAWAYS

Five ways to elevate engagement by embedding new field behaviors:

1 Communicate a clear value proposition to the learner – answering *'what's in it for me?'*, *'why now?'* and ensuring the leadership team is supportive

2 Don't just focus on tools and tactics. Soft skills are equally important (if not more)

3 Deploy diverse ways of learning. Variation leads to motivation and suits different learning styles

4 Make training a journey, where achievements are celebrated and shared in the community

5 Ensure change is measurable to show the value of the program over time

VEEVA PULSE FIELD TRENDS REPORT REVEALS...

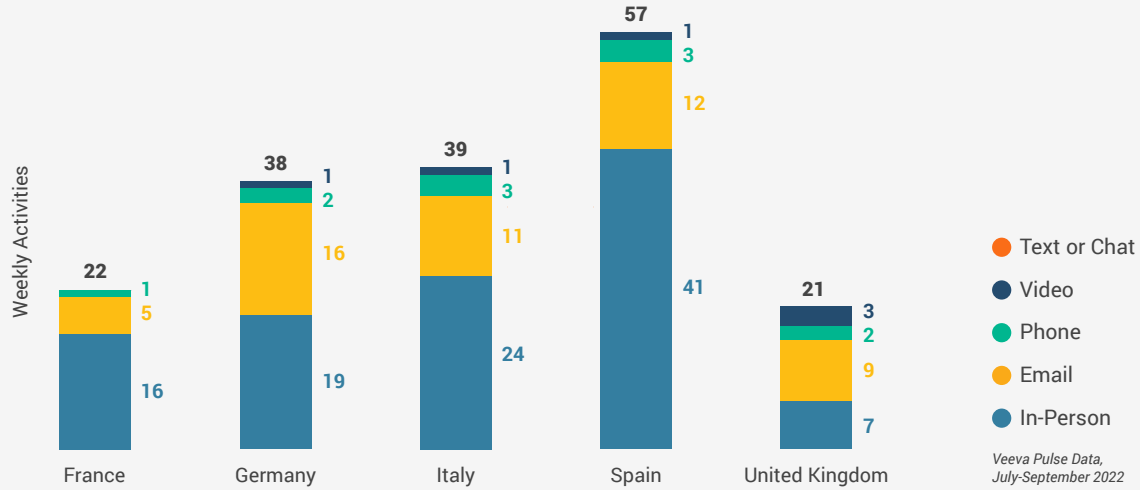| **52%**	**65%**		**10%**	
HCP access in Europe higher than expected	of accessible HCPs meet three or fewer companies	Engagement approach determinant of access	growth in content use during video meetings in Europe	U.K. fills access gap through greater use of video

1 Webinar, Abelson Taylor and Veeva: 'HCPs' strategic shifts in response to COVID-19', July 2020
2 Veeva Pulse Field Trends Report

FIGURE 1: ACTIVITY & CHANNEL MIX (EU VS REGIONS Q3 '22)

Weekly Activities

France — 22: In-Person 16, Email 5, Phone 1

Germany — 38: In-Person 19, Email 16, Phone 2, Video 1

Italy — 39: In-Person 24, Email 11, Phone 3, Video 1

Spain — 57: In-Person 41, Email 12, Phone 3, Video 1

United Kingdom — 21: In-Person 7, Email 9, Phone 2, Video 3

- ● Text or Chat
- ● Video
- ● Phone
- ● Email
- ● In-Person

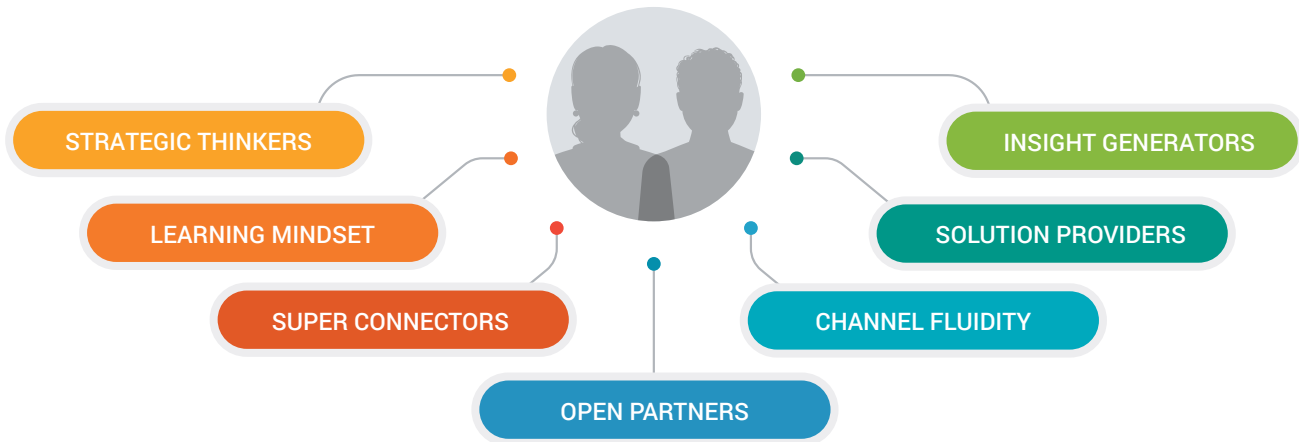*Veeva Pulse Data,
July-September 2022*

The increasing importance of digital channels has caught many biopharma companies off guard, with one in three saying they are poorly resourced for digital engagement – and more than 90% expecting improvements in digital expertise within every function of their organizations.[3]

While life sciences companies are not short on ambition, the path to achieving omnichannel excellence is a challenging one for most field teams. This new environment demands a broader skillset and a different way of operating that go beyond learning how to use new channels.

We have identified seven key skills that leading field teams need to master to remain competitive. Future reps, medical science liaisons (MSLs), and key account management (KAM) need to be able to think strategically about their customers' needs and connect the dots across a complex stakeholder ecosystem. They need to be open, collaborative, and trusted partners, orientated around their customers, and have a learning mindset to adapt and provide value-added solutions. The ability to capture and generate insights will help them tailor engagement. Finally, they need to be able to quickly and easily use the right channel at the right time – whether an in-person meeting, remote call, email, or even a chat or Instant Message.

SEVEN KEY SKILLS FOR FIELD TEAMS

- STRATEGIC THINKERS
- LEARNING MINDSET
- SUPER CONNECTORS
- OPEN PARTNERS
- CHANNEL FLUIDITY
- SOLUTION PROVIDERS
- INSIGHT GENERATORS

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[3] EPG Health Report: The Gaps Between HCP Demand and Pharma Supply of Medical Information, 2021

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Driving new behaviors

Biopharma organizations must provide the right level of practical support for field teams to adapt and succeed in this new environment. Unfortunately, change management and training are often rushed (or skipped) under the assumption that technology, in combination with some communication or maybe a user demo, is enough.

Omnichannel strategies demand a change approach that places tool usage in the wider context of upskilling and empowerment. For instance, learning about the technical options of using Veeva CRM Approved Emails, without understanding why or how they can enhance other interactions (like face-to-face), may lead to frustration (and lower usage in the long run) as it can just feel like more work for reps.

There is often insufficient focus on the behavioral change required to realize value. Customers may encounter several potential pitfalls when trying to change behaviors:

- ☐ Misalignment between beliefs and actions – the answers to 'Why do it?' and 'Why now?'
- ☐ Response to 'What's in it for me?' is neither compelling nor tailored to the role
- ☐ Poor communications, with the program not clearly linked to the vision of the organization

- ☐ Lack of momentum due to weak sponsorship and absence of organizational commitment to drive through (and continuously reinforce) change
- ☐ One-size-fits-all training, which is too focused on technical aspects; over-reliance on one-time classroom training
- ☐ Lack of end-user input and tendency to drive through change without understanding end-user pain points or 'jobs to be done'
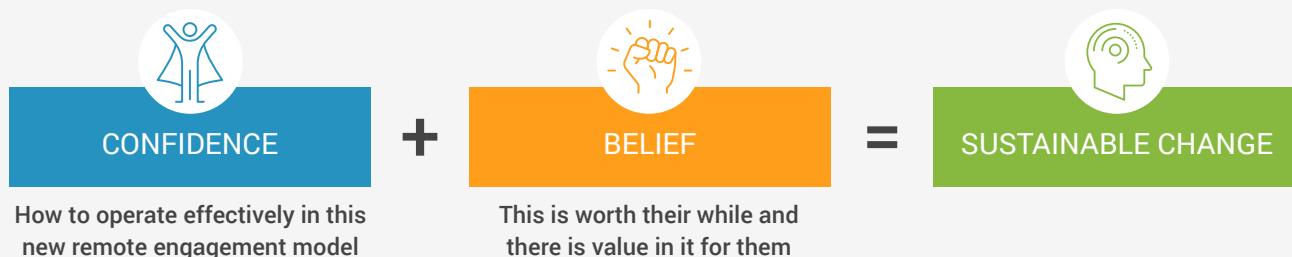- ☐ Change is seen as a one-off exercise completed as soon as users are trained

An effective change and training program gets field teams excited about omnichannel, showing it can help them with their daily tasks (or 'jobs to be done') and positively impact their overall relationship-building efforts, elevating HCP engagement to a higher level.

In the previous example, any training should also explain best practices on Approved Email structure, calls to action, when to send emails, or how results could be enhanced if sent before (or after) face-to-face meetings, as well as evidence of impact delivered. This way, we can empower field teams to use different channels when they are most effective, rather than promoting one option over another.

The journey to sustainable change

Sustainable change for field teams relies on building confidence and belief in the program. These are two sides of the same coin. Put another way, the aim is to create both the **skill** and **will** for change to endure in field teams.

THE FORMULA FOR SUSTAINABLE CHANGE

CONFIDENCE	+	BELIEF	=	SUSTAINABLE CHANGE
How to operate effectively in this new remote engagement model		This is worth their while and there is value in it for them		

Seven key elements need to come together to deliver effective change and ensure buy-in:

1. Start with the 'why'

To drive behavioral change, we need to first understand the pain points and challenges field teams face and make sure they are addressed through any proposed solutions. Identifying the 'jobs to be done' and putting the user experience at the center (by ensuring tools are easy to use) will help drive adoption.

For field teams to succeed, training should focus on improving their understanding of the 'why' as much as the 'how'. If field teams understand why omnichannel is important to the business and its impact on HCPs, they are more likely to want to take the 'right' action for each customer, rather than defaulting to certain tools or following specific steps. This nurtures the willingness to learn about other highly effective engagement
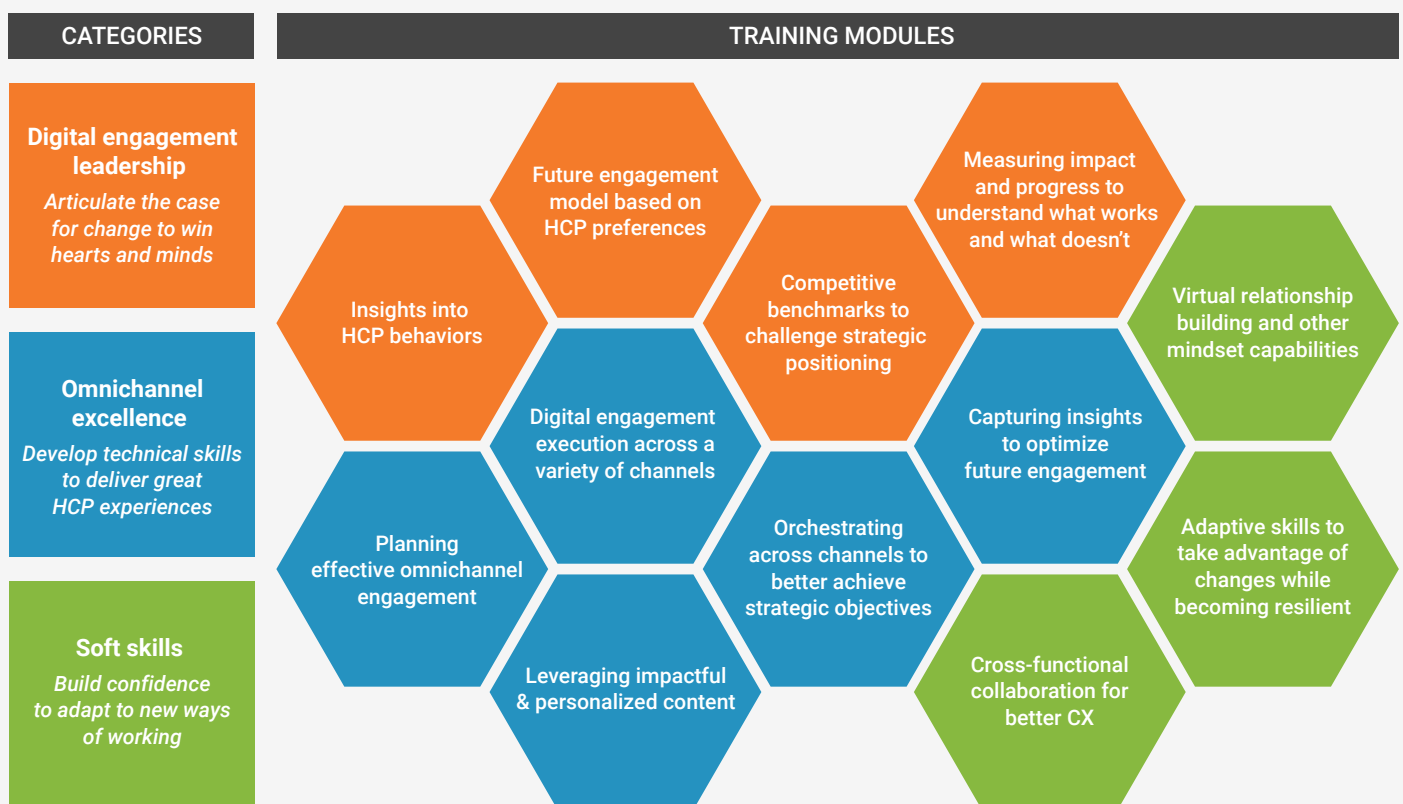
tools, including (but not limited to) remote call and email platforms; explore new ways of partnering with customers; and capture and use insights. If the value of the proposed solution is clear, it will become much easier to win users' hearts and minds.

2. Update and upgrade your training curriculum

Training for field teams has historically been anchored around brand promotion and gaining access to HCPs. However, with so many field teams now engaging with HCPs through video calls, emails, and events, access has changed significantly.

A curriculum for the omnichannel field team needs to reflect the new skills required while being flexible to the different engagement needs of brands and markets. It's effective to focus first on foundational approaches and behaviors that should span all parts of the organization.
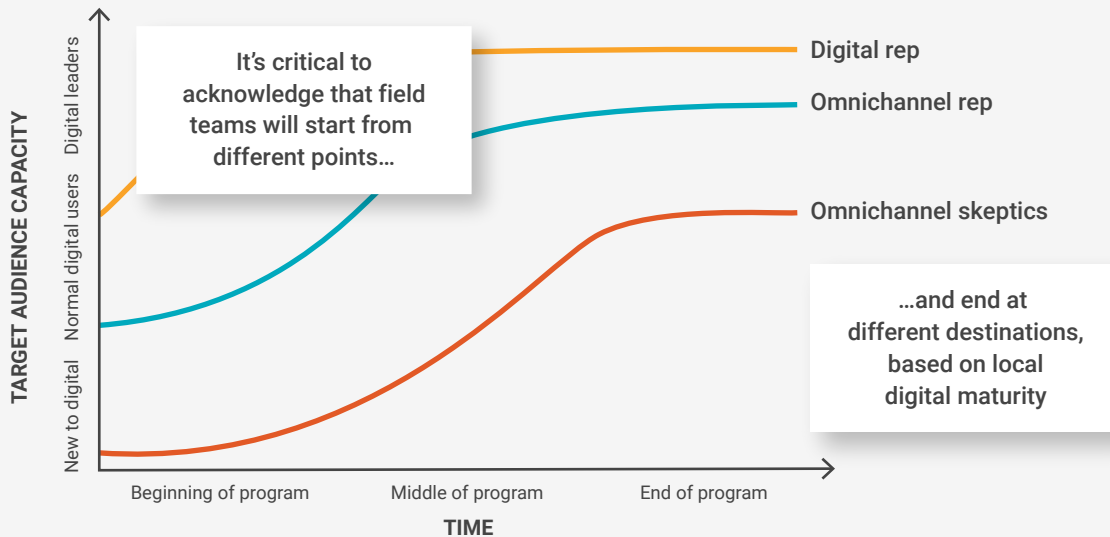
EXAMPLE OF MIXED CURRICULUM FOR OMNICHANNEL

CATEGORIES

Digital engagement leadership
Articulate the case for change to win hearts and minds

Omnichannel excellence
Develop technical skills to deliver great HCP experiences

Soft skills
Build confidence to adapt to new ways of working

TRAINING MODULES

- Future engagement model based on HCP preferences
- Measuring impact and progress to understand what works and what doesn't
- Insights into HCP behaviors
- Competitive benchmarks to challenge strategic positioning
- Virtual relationship building and other mindset capabilities
- Digital engagement execution across a variety of channels
- Capturing insights to optimize future engagement
- Planning effective omnichannel engagement
- Orchestrating across channels to better achieve strategic objectives
- Adaptive skills to take advantage of changes while becoming resilient
- Leveraging impactful & personalized content
- Cross-functional collaboration for better CX

3. Personalize the learning journey

Omnichannel training is not a one-off exercise, but instead a journey where training is just one component. For this to be tangible, we need to build learning paths that reflect every individual's current capabilities, role needs, and learning preferences.

This approach acknowledges that not everyone starts the journey from the same point, helping field teams to identify different maturity levels among the HCPs they target, and support them during the transition to desired behaviors. This is also important when deploying training to markets with different levels of omnichannel maturity. Training needs to be designed to increase capability, whatever the starting point.

It's critical to acknowledge that field teams will start from different points…

…and end at different destinations, based on local digital maturity

Digital rep

Omnichannel rep

Omnichannel skeptics

TARGET AUDIENCE CAPACITY

Digital leaders · Normal digital users · New to digital

Beginning of program · Middle of program · End of program

TIME

We expect field teams to become more flexible and adapt their interactions to HCPs' preferences and needs, and the same principle should also apply to the field team's learning experience. Flexibility and the ability to learn on the go are musts. Consider delivering bite-sized content, across a range of formats suitable for mobile devices, so that field teams can easily combine and consume content on demand.

EXAMPLE MIX OF LEARNING FORMATS TO CHOOSE FROM

Instructor-led Training	Whether it's face-to-face or virtual, classroom training is a powerful way to land complex content	
eLEARNING	Great to complement or reinforce instructor-led training in an interactive and easy-to-consume way	
Videos & Podcasts	Helpful to visualize complex topics or engage with learners differently	
Simulations	Support learners in applying the newly acquired skills in a safe environment	
AI & Chatbots	Leverage AI and chatbots to reinforce behaviors while users apply new skills	

BITE-SIZED CONTENT • PERSONA-BASED • TAILORED CURRICULUM

5. Align to support the required behaviors

Those who work closely with field teams must understand the new behaviors and why these have evolved. Leadership has an important role to play in supporting capability development and also avoiding the return of old behaviors. A good example is making sure that the incentives and objectives of reps are aligned to the new omnichannel behaviors as well as business processes, such as customer targeting and multi-channel cycle planning. Only then can you be confident that field teams will embed these capabilities.

6. Lead from the top and continuously reinforce change

Changing behaviors is hard, and it is human nature to revert to established ways of doing things. It's important to build momentum and excitement that go beyond regular communications and reminders. Foster a sense of community by celebrating key milestones (like program kick-offs or 'graduations') to reinforce the organizational commitment toward change and reward

learners for their achievements. First-line managers play a key role, by coaching field teams, recognizing progress, and encouraging knowledge exchange.

Omnichannel engagement will continue to evolve. It's important to create a safe space to ask questions – perhaps a network of experts or 'refresher' training sessions where learners can test or give examples from their practice. This helps learners to challenge, adapt, and apply their new skills to their own context and keeps the program alive outside the training sessions.

7. Measure change to show impact on behaviors

Transformation programs tend to be long and complex and need strong governance to track implementation and adoption over time. It's as important to keep the program alive as it is to measure the impact on individuals and the whole organization. This demands a measurement framework that goes beyond the classic implementation metrics and assesses behavioral change (and corresponding value).

MEASUREMENT

Teams should track five dimensions, each with a mix of quantitative and qualitative KPIs:

EXPOSE Track who participated or consumed different modules, and if that corresponds with training expectations by role and individual e.g., number of trainings completed by role per year

CHALLENGE Assess whether participants understand the training content and consider it valuable to complete their daily tasks e.g., reaching a certain score on quizzes

APPLY Understand if learners are using the new skills or knowledge gained e.g., new channel targets set on MCCP are achieved

EMBED Test if the training is driving new behaviors e.g., change in channel mix to engage with customers

IMPACT Evaluate if the desired results have been achieved e.g., more regular HCP interactions

Conclusion

To assess if there is an opportunity to improve how your organization engages with customers, we recommend asking yourself three key questions:

1. **How do we compare?** Use Veeva Pulse data to assess current performance versus competitors and define what best-in-class looks like.

2. **Is our current field team fit for the future?** Challenge whether your current team's behaviors and ways of working are likely to be effective in the future. Define what is expected now and what will be needed.

3. **Where are the skills and capability gaps?** Carry out a rapid diagnostic to understand adoption and field readiness to succeed in this new environment and put an action plan in place.

Field teams will continue to play a critical role in how you go to market. However, the nature of what they do and how they do it will have to evolve. Behavioral change and capability building take time, so there is no better time to start this journey – or if you are already on the journey, to reinvigorate and accelerate your approach. Those that do so will build a competitive advantage through better-quality customer engagement. With the amount of money invested in field teams, it's too important to leave to chance.
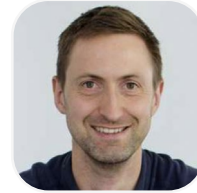
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