

10 ways to mobilise your advocates

A practical guide by Andy Waiton and Nic Hallett

Opinion leaders, advocates, thought leaders – there are many terms used within the industry to refer to those that are simply 'important clinical customers'. Advocates are natural sales people and influencers who can't help but market their opinions. You can keep your fingers crossed that their opinions are helpful to you, your

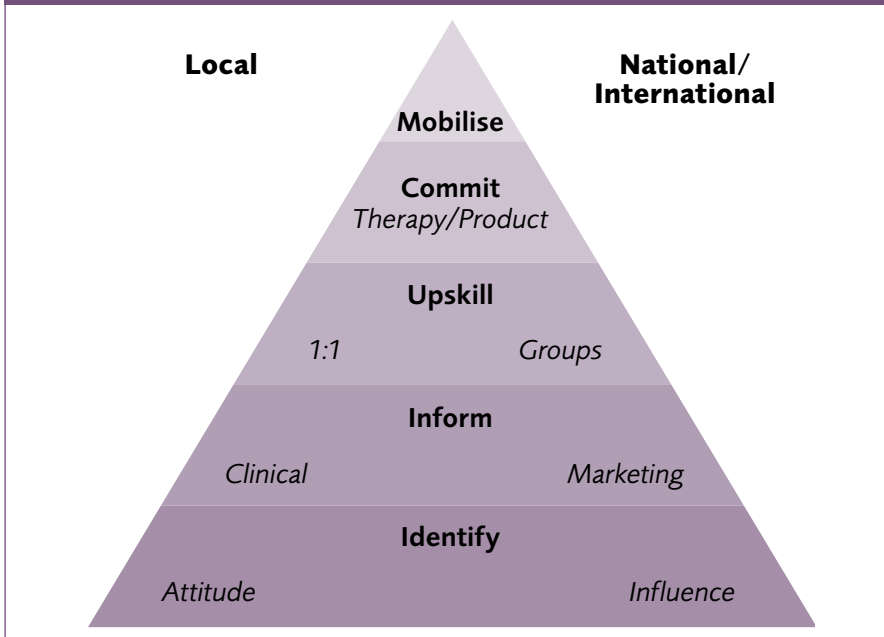
product and your strategy, or you can get involved, get them onside, and help manage the message.

This document is designed to be a concise, informative and simple guide to help you mobilise your advocates. You can guarantee that if your advocates are not with you, they will be with your competitors.

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Figure 1: The five phase model to mobilise your advocates



THE MODEL

Mobilise your advocates with this simple five-phase model with 10 steps. It can be applied to a distinguished professor in a teaching hospital through to a nurse running smoke cessation clinics in an inner London GP practice.

These are the people that pharma companies need to engage with – to become partners with – and if this relationship is well managed it will lead to: brand success; patients treated correctly and safely; increased status of the advocates; and long-term medical advancement.

So, let's take a look at each step...

1. IDENTIFY THOSE WITH THE RIGHT ATTITUDE

Arguably the most important step is identifying the right people to work with, and it is worth focusing on those who already have a positive and collaborative attitude. This is because attitude is the quality that is most difficult to influence if they are not already on board. Attitude is formed from a deeply held series of beliefs, values and personal identity. Once developed and fixed, these qualities are not easily shifted.

A commonly used approach, made famous by Jack Welch's *General Electric* (in collaboration with McKinsey) involves a matrix looking at capability/skills and attitude/values.

- Those with great attitude and skills are the 'stars' and will make excellent advocates.
- Those with great attitude and lesser skills can be trained to become good advocates.
- Those with poor attitude, whether they are highly skilled or not, will not be easy to work with and will not make good partners.

So, what attitudes are you looking for?

- Positive about the role that the pharmaceutical industry and medicines have to play in healthcare
- Positive about the importance of your therapy area in the management of patients
- Neutral or positive about the value of your medicines or products in treating this type of patient
- Positive about the role that specialist clinicians have to play in informing and educating their colleagues.

How do you identify those with the right attitudes? When selecting advocates there is no substitute for getting to know them. Often sales reps will personally know the customers, but it could be sales managers, medics, NHS liaison or marketing colleagues.

2. IDENTIFY THOSE WITH THE RIGHT SPHERE OF INFLUENCE

If your chosen advocates are not listened to, respected and admired by their peers, the value of their views could be minimal.

So 'sphere of influence' is defined by who is exposed to this person and their views, and also how believable and credible they and their claims are. You will want to identify those who are known on the;

- Local stage; practice or trust level
- Regional stage; PCT or SHA level
- National stage; countrywide conferences
- International stage; overseas conferences

So, how do you identify the sphere of influence of potential advocates?

Again ask your staff but also talk to your customers. Who do they listen to, go to see, and whose writings do they read?

Desk research will include:

- Are they well published?
- Do they get asked to run major trials?
- Do they speak at conferences?
- How well known is their institute or practice?

This research will identify influencers from international cardio-thoracic surgeons to regional GPs. Do your homework and you will be able to make the right choices.

3. INFORM THE CLINICAL DETAIL

Educate your advocates so they have all the clinical data that they need in order to make an accurate and informed decision with respect to your brand. To be mobilised they will need to be convinced and convincing. Advocates often like to believe that they are more knowledgeable than most of their peers and all the information that you can provide will help with this.

Responsibility for interfacing with the advocates and credibly delivering this information depends on their role and your resources. The aim is for peer-to-peer discussions between equivalently experienced and senior people. Ideally this might mean:

- Medically qualified, in-company advisory staff having peer-to-peer discussions with senior clinicians
- Scientific advisors and medical information specialists in contact with specialist pharmacists
- Nurse advisors working with

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- hospital and community nurses
- Specialist representatives and managers meeting up with general practitioners.

As well as one-to-one meetings, a well-structured and facilitated advisory board programme will help deliver clinical information efficiently, provide feedback and help develop a strong relationship with the company.

4. INFORM THE MARKETING STRATEGY

Advocates do not expect to be dumb mouth-pieces for any company but rather to help shape the way that any given condition is managed and treated. They recognise the vital role that healthcare companies have in marketing, informing and educating the public and wider medical community – and want to work with you in partnership.

This requires an open, two-way dialogue about how you see your product fitting into the management of a given condition and the relative importance of that condition within the therapy area. You are looking for common ground where they can be informed, and can even influence your brand positioning, key claims and messages and even the way in which you plan to visualise clinical data.

Whether you inform potential advocates through one-to-one meetings or advisory boards, this is where your company's marketers are best qualified to run the discussion. They typically bring the balance of sales, patient, clinical and promotional focus to the discussion. But avoid the jargon, clichés and unnecessary emphasis on sales figures and profits – they can be a real turn-off to healthcare professionals.

5. UPSKILL ONE-TO-ONE INFLUENCING

Your advocates have been identified and informed, but do they have the skills to share this information?

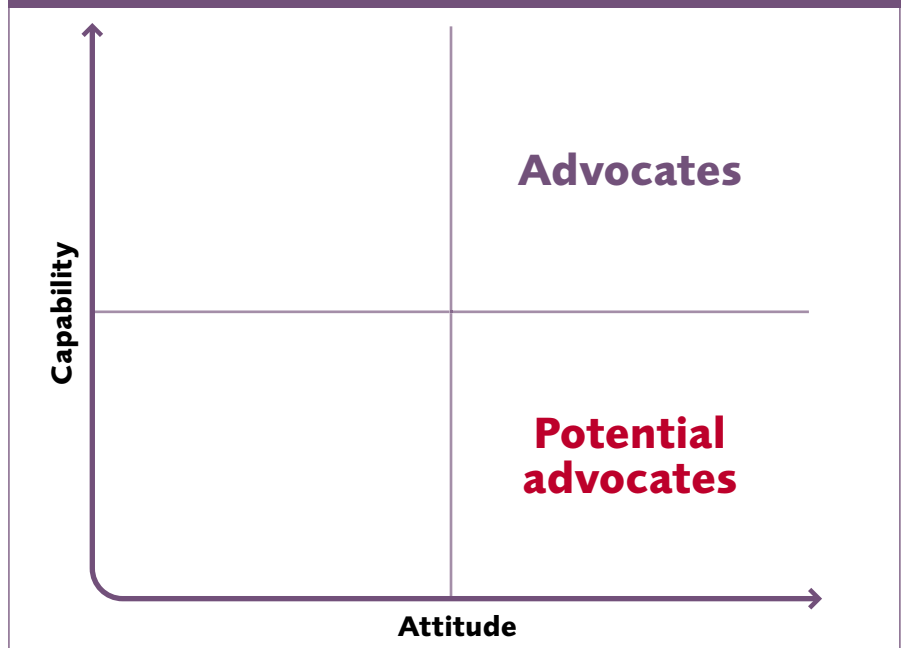
Most healthcare professionals are more open to persuasion if the other party is confident, knowledgeable, open and friendly, and can create an easygoing rapport. Intuitively this makes sense, and yet any number of people in life can be real experts without the interpersonal skills to be advocates.

Fortunately, such skills are just that, behaviours that can be learnt. It is not a case of being born with the gift, but rather learning and practicing the capability.

Experience suggests that the majority of healthcare professionals are very keen to receive the kind of personal training and development that has been available to their peers in the commercial arena for decades. Building instant rapport, understanding influencing strategies and negotiation skills, can help your customers deal more effectively with their patients, as well as communicating more convincingly with their colleagues.

Professional, quality training and development can be organised via one-to-one

Figure 2: Identify knowledgeable and positive advocates



coaching sessions at the advocate's place of work, or via group seminars, as either a stand-alone programme, or added on to a pre-existing meeting such as an advisory board.

6. UPSKILL GROUPS INFLUENCING

Although it is important for advocates to have strong one-to-one communication skills, the most important, high-profile events invariably involve presentations to audiences.

Public speaking is the number two phobia in the UK (bizarrely second to spiders). This means that some of your key customers who have all the right attitudes and information and who can speak convincingly in small groups, clam up nervously in larger groups. And for some, 'large' may mean as few as six people in the group.

Whether they are presenting, or chairing the proceedings, they need the skills to manage nerves as well as the skills of looking and sounding confident, of handling visuals convincingly, to orchestrate the audience, as well as encouraging or discouraging questions and discussion.

Advocates recognise the vital role that healthcare companies have in marketing, informing and educating the public and wider medical community

Not surprisingly, few advocates are perfect speakers. This explains why, in more than 22 years of business, Presenting and Chairing Meetings has been the most requested workshop at the Excel Academy – because these skills can be taught.

7. COMMIT TO THERAPY

You have the right people with the right attitude, the right information and the right skills – soon you can mobilise them. But will they want to go out and spread the word?

Advocates are being asked to abandon their surgeries and clinics, and travel the country, or even the world. Why should they? Check their commitments in advance to prevent frustration at their lack of availability.

If your advocate development plan has followed all the previous six steps – carefully selecting the right people, then investing time, effort and training in them – there should already be a high level of commitment present. However, it is easy to assume that this commitment is to your therapy area and product whereas it may be just to you or your company. It is essential that you review this before your advocate goes public.

The penultimate planning step is a frank and open discussion with each individual advocate to clarify any assumptions and learn about how they really feel and think about your therapy area – exactly what are they comfortable to stand up and make claims to in public? When pushed or challenged how strongly are they prepared to argue back? You both need to be clear on what you can expect, in order to avoid unwanted disappointment ahead.

You should plan to discuss gains and consequences. When the advocate speaks out in public in support of your agreed platform, what are the positives that will be gained by the patients, by them, as well as by you

and the sponsoring company? Similarly, if the advocate chooses not to speak, what are the negative consequences for the patients, for themselves and for you?

This will help strengthen their commitment to the message for everyone's benefit.

8. COMMIT TO THE PRODUCT

An individual's commitment to a specific product is a double-edged sword, but again you must be clear on their views. If you can achieve your strategic plans with advocate endorsement at a therapy level this may be preferable. For an advocate to be too strongly identified with a single product potentially lays them open to accusations of bias. This is even more so if they are perceived as being 'in the pocket' of any given company.

Having an advocate facilitate your marketing messages by supporting positive treatment options but from a distance may be more helpful. However there are also occasions where named endorsement is vital and this is a decision only you can make – just be sensitive to not overexposing such direct support.

9. MOBILISE LOCALLY

Having invested time and resources in your group of advocates, if coordinated well, the mobilisation phase is when your brand benefits from all the historical groundwork.

Whether it is within a primary or secondary care setting, geographically selected or based around a therapy specific interest group, it is

If an advocate is too strongly identified with a single product they could be accused of bias. Facilitate their messages from a distance

important to build an advocate's experience and profile from the ground up.

Know an advocate's clinical USP (unique selling point) and use it to really sell the idea of meeting attendance to the most appropriate audience. Organising the meeting is a great opportunity to spend some quality time with them and help them plan with your healthcare outcome, and their audience, in mind. Every audience can spot a standard, off-the-peg presentation and if it is too specialist or simple, the meeting will fail at every level.

Support their planning with the following five questions;

1. What is our outcome for the meeting?
2. What is the audience going to be like?
3. What venue/equipment will I have?
4. What does the audience need to hear from me (content)?
5. What does the audience need to see to better understand me (visuals)?

Many advocates fall foul of presenting everything they know rather than what the audience needs to hear – emphasise that 'less is more'. Visual aids, particularly PowerPoint slides, are very often too complex and too detailed, challenge them to simplify and delete.

The rule of KISS is as true today as ever; Keep It Short & Simple, the rule for slides is one content slide for about every three minutes of presentation. Thus a 10-minute presentation only requires about three or four slides if they are to be explained clearly and their relevance discussed. Surprisingly, this takes pressure off the advocate and makes it more engaging for the audience.

Regarding the meeting logistics, sell the meeting to your representatives, they are crucial to your success. Once a meeting has been arranged, invite customers once, twice, then invite them again. Sell the meeting and watch them enter it into their diary, then remind them as often as you can.

10. MOBILISE NATIONALLY AND GLOBALLY

National and global meetings differ primarily in terms of the scale of the event, however, there are some important differences.

National and global meetings tend to have larger audiences. Any group in excess of 50 means you should employ radio-lapel microphones and amplification. You will usually be on a raised stage with lighting and will be more reliant on PowerPoint for your visual aids.

While the fundamentals of great presentation skills and chairmanship are the same, your Step 6 training must prepare national advocates for the big stage. A specialist training company can organise preparation on a real stage – advocates can feel the heat from the high power spotlights, work with microphones and sense the lonely reality of an empty stage. Proper coaching will fully prepare them to make the most of this opportunity, as national meetings are not the place for risks.

Global meetings are the same but bigger again, the biggest difference is that audiences are usually multinational with people listening in their second or even third language, sometimes employing simultaneous translation. Advocates need to be coached to slow down their pace of delivery, to enunciate more clearly and avoid colloquialisms.

AND FINALLY...

With all the hard work that goes into developing and mobilising advocates and organising meetings it is still so important to just remind yourself that no-one has necessarily sold anything yet! All this is about creating the right opportunities to have the right discussions with the right people. So now the sales teams need to step up to the mark and as the meeting finishes the selling begins.

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The Excel Academy provides bespoke training events to help pharmaceutical companies develop opinion leader programmes

- Add value
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* Independent research conducted by TNS Healthcare, Feb 2007

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