



## Before They Say “Yes” Article

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The Success of your Speaker Program Depends on More Than Just Finding A Speaker.

You are sitting at your desk, planning your speaker meetings for this quarter. Perhaps you are excited about the prospect of implementing these events as a way of supporting your sales efforts. Or you may be groaning at the thought of having to do what you see as another make-work project. In either case, the success of each event will depend on the time and effort you put into planning it.

### Six Steps to Success

Before the speaker says "yes," there are six steps you should complete that will help you achieve better attendance and more audience participation.

#### **Step One: Set firm business objectives and tentative learning objectives.**

When planning a speaker program, consider both your business objectives and your learning objectives. Your business objectives describe what you want to achieve in exchange for the time, effort and expense you invest. Business objectives are not communicated to the speaker or the audience, but they should be shared with your manager, as well as your co-marketing or territory team partners.

Here are some things to consider when you create strategic business objectives:

- **Purpose:** Why do a speaker program in this area of my territory at this time? How will this event help me improve my sales? Am I trying to predispose these physicians to a concept or idea? Change their prescribing behaviors? Reinforce current prescribing behaviors?
- **Background:** What are my competitors doing that will influence what I do?
- **Opportunity:** What is the opportunity here? What do I know about my customers' needs and "hurts" that this program could address? What is happening that I could capitalize on?
- **Budget:** What budget can I allocate to this event?
- **Type of event:** What type of meeting would be best? A lunch-and-learn? A dinner meeting? A breakfast round-table?

- **Challenges:** What challenges may I face and how will I meet them?
- **Logistical steps:** What details do I need to take care of to ensure a successful program?

Use your business objectives to help you make tough calls on how to proceed with the event.

Learning objectives are audience-focused and highlight the content the speaker should cover. They state what the audience will learn or do differently or better as a result of attending this program. They should be shared with the speaker and your audience.

Your objectives should be SMART: specific, measurable, attainable, relevant and time-bound. Start your learning objectives with the following phrase: "By the end of this speaker program, the participants will be able to ... " Then complete the phrase with a measurable action verb such as *describe*, *compare*, *state* or *define*.

For example: "By the end of this speaker program, the audience will be able to:

- "Identify the signs and symptoms of disease X."
- "Select the most appropriate medication to treat disease X."
- "Differentiate between the various products in this drug class."

Although your business objectives should be firm, your learning objectives should be tentative until they are validated by your target audience.

## **Step Two: Determine the composition of the target audience.**

If your manager were to ask you, "Who are you planning to invite to this meeting?" would you simply answer, "Physicians"? You shouldn't. You know that physicians' clinical experience will vary in terms of knowledge and use of your products, as will their attitude toward speaker programs and the speaker. Some physicians will be champions of your product, while others may be resistant to prescribing it. In some cases, the audience won't just be made up of physicians. It is important to consider how the program will meet the needs and interests of all healthcare professionals in attendance.

## **Step Three: Gather audience needs.**

Doing a needs assessment doesn't have to be a long, drawn-out process. Make the most of your limited time with each physician to show him your tentative learning objectives and ask for comments, or to ask good, open-ended questions and then listen carefully to the answers.

Asking customers what they want will lead to increased attendance and satisfaction, because the physicians will be more interested in taking part when they know the event will meet their needs and thus be a productive use of their time.

Also, find out which learning format they prefer. Do they like a traditional 45-minute lecture followed by a short Q-and-A session, or a more interactive session involving discussions of current clinical cases or problems they are facing? The format will influence your choice of speaker.

Here are some examples of needs-assessment questions you could ask during regular sales calls:

- "What are your concerns when treating disease X that you would like information about?"
- "What hot topic in disease X would you most like to see addressed?"
- "If you were a specialist, what do you feel would be a good topic on disease X for a general practitioner audience?"
- "What program format appeals to you most? Why?"

#### **Step Four: Revise the learning objectives as necessary.**

Based on the information you gather in step three, you may need to alter the program's learning objectives. Your flexibility is important and will be appreciated by your customers.

#### **Step Five: Consider who to approach as your speaker.**

What if you approach Dr. X, who is most comfortable with a traditional lecture/Q-and-A format, to speak to an audience that prefers a very interactive case study? Conversely, what if your speaker prefers to facilitate rather than to present, but your audience prefers a lecture? In either case, the fit is wrong.

If you are fortunate to have access to numerous dynamic, qualified physician speakers, you can afford to be selective. Even if you aren't, you should still try to choose the best match for the audience. In either case, you may also want to provide the speaker with some value-added presentation or facilitation skills training or coaching.

The list on the following page under "successful speakers & facilitators" shows the characteristics of effective speakers and facilitators. Note that facilitators need all the qualities of effective speakers *plus* the characteristics of effective facilitators.

## **Step Six: Approach the speaker.**

Once you have chosen the best speaker for your audience, you are ready to approach the physician. Your role now changes. You are in the driver's seat, because you are the client and your speaker is the "supplier." Although many physicians take on speaking contracts because they love to teach, many also use speaking engagements to supplement their income. It is critical that the speaker meets the audience's expectations, because it will be more difficult to get physicians to attend your future events if they are disappointed by this one. When you approach a speaker, don't actually confirm that you are hiring him until you are sure the fit is right.

Getting the physician to meet with you can be difficult. Verify that he is available on the date of your meeting, and stress that this is an exploratory meeting to discuss a speaking engagement. Before you make a commitment, you should ensure that he will present your product, at a minimum, in a neutral way. Ideally he will be comfortable saying a few positive things about your product.

Since most physicians are very busy, book the appointment one to two months in advance. Invite the doctor to breakfast, lunch or dinner so you have his focused attention. Bring printed information, such as visual aids, clinical papers and a speaker's kit, that you may want to leave with him.

During the appointment, make sure you discuss the learning objectives. Share with the speaker, in writing, the needs you have gathered from the target audience, as well as the content to be covered. Discuss the learning format for the session, and provide insights on challenges he might encounter. This will help you recommend particular slides or cases for him to present.

After you've shared your learning objectives, review the program content. The physician is an expert on the medical topic being presented, but he may not be an expert on your product. Keep control of the situation as much as possible by asking about his experiences with your product. Help him understand your product's advantages, and make sure he is knowledgeable and comfortable enough to position it fairly against the competition.

Physicians are hesitant to look like "salespeople." They want to remain neutral and objective for fear of losing credibility. It is not their job to sell your drug from the front of the room. It is your job to sell the audience on your products after the event.

Once you've discussed the topics above and the physician has agreed to speak, confirm the logistical details:

- The date, time and location of the session.
- The honorarium.
- A telephone or pager number where you can reach the speaker on the day of the conference. Give the speaker your contact information as well.
- A signal you will use to let him know time is running short.
- The desired room setup and his equipment needs.
- How he would like to be introduced.

Planning a speaker meeting without first considering the needs of your audience is like sending a love letter and addressing it "to whom it may concern." Using this six-step process before the speaker says "yes" will ensure a successful outcome and a positive return on your investment.

## Successful Speakers and Facilitators

### The "Sage on the Stage"

Characteristics of an effective speaker

- Has good projection, voice intonation and eye contact.
- Is charismatic and passionate.
- Is knowledgeable and credible.
- Is articulate.
- Is respected.
- Appears well-groomed.
- Is personable and humorous.
- Is confident.
- Is flexible and coachable.
- Charges a reasonable honorarium.
- Makes complex things simple.
- Positions the product fairly.
- Is organized and knows material.
- Is punctual and reliable.
- Isn't condescending.

## The "Guide on the Side"

Characteristics of an effective facilitator

*All speaker traits plus:*

- Encourages interaction.
- Is diplomatic, tactful and in control.
- Guides the audience.
- Is nonjudgmental.
- Is mindful of role and doesn't need limelight.
- Is observant.
- Explains procedure clearly.
- Draws thoughts from group.
- Refocuses if off-topic.
- Moderates pace and energy.
- Motivates audience to think and be involved.
- Makes audience comfortable.
- Reads audience reactions (watches for and acts on questioning looks or reactions.).
- Keeps atmosphere upbeat, relaxes, fun and interesting.
- Solicits feedback on "pearls", expectations and future needs.
- Is an active listener and relates points of interest to topic under discussion.
- Handles challenging participants.

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