

QIS, A Field-Based E-Evaluation Tool

Marketing Strategies and Tactics That Are Making the Grade

RECOGNIZING THAT THERE OFTEN ARE GAPS BETWEEN THE EXPECTED AND ACTUAL USE OF MARKETING MATERIALS IN THE FIELD AND THE IMPACT THIS CAN HAVE ON A COMPANY TO MEET ITS OBJECTIVES, AN EXECUTIVE AT FUJISAWA HEALTHCARE SETS OUT TO SOLVE THIS PROBLEM.

Marketing groups at pharmaceutical companies rarely collect rigorous, field-based data from the managers and sales reps regarding the marketing materials they use. In most cases, this component of the larger sales and marketing system is entirely overlooked.

When Jerry Olszewski, senior director of marketing, hospital products, at Fujisawa Healthcare Inc., wanted to evaluate the effectiveness of the marketing materials that were being developed for, and used by, the company's hospital products salesforce, he and Jim Grossmann, VP at Williams-Labadie LLC, the company's agency of record, collaborated with DLS Group Inc., a consulting firm, to design, create, and implement a Quality Improvement System (QIS).

"A question that frequently arises for product managers is whether the right materials are being developed for the salesforce and whether those materials are providing value for our sales reps," Mr. Olszewski says. "It doesn't make sense for us to spend money and resources developing things that don't work and that the representatives won't use."

QIS collects real-world data from reps and managers in the field through online surveys. The goals of QIS are to: identify the sales and marketing materials that are working well and determine why they do; determine the materials that are not working well and how to improve them; identify any other potential breaks in the performance chain, as well as their causes and potential solutions; observe changes in manager and rep responses; and discover new trends arising since the last implementation of the QIS.

Fujisawa's first target for this process was the hospital salesforce's products Adenoscan (adenosine) injection, a pharmacologic stress agent for use with myocardial perfusion imaging to identify areas of

the heart affected by coronary artery disease, and AmBisome (amphotericin B) liposomal for injection for treating serious invasive fungal infections. Mr. Olszewski was in charge of cardiovascular products when he began working on the QIS, and when his responsibilities expanded to cover all hospital products, so did the scope of QIS.

"When I became senior director for all the hospital products, one of my first tasks was to address comments I heard from the sales field that they did not have enough of the right materials," he says. "I had to find out exactly what that meant. We needed to test what had been used in the field to make sure

that we were on the mark with what the sales reps' needs were and also how the physicians, their customers, were perceiving those tools. We wanted to know if the tactical tools were delivering the message developed from the strategic plan and marketing plan. Adenoscan was, and still is, our largest product in the cardiovascular area, so it was a natural candidate for this process. And AmBisome is our feature product in the anti-infective area so we wanted to test it immediately. Fujisawa also has tested Protopic (tacrolimus) Ointment; Prograf (tacrolimus capsules) is the only product currently not being evaluated through QIS."

When creating the QIS survey, the team looked at every aspect of the field force's promotional arsenal, including sales materials and sales promotional programs. And the evaluation was not limited to the materials reps used in the field. The QIS included all of the different projects and promotional venues that the Fujisawa sales team uses to market hospital products.

"Reps and managers were asked about visual aids and direct-mail campaigns and how those sup-



JERRY OLSZEWSKI

Quite often there is a silo separating marketing and sales. The QIS helps us to break down those silos and provide ownership all the way to the representative level so, ultimately, by using the tools, our customers, the physicians, get the message the way it was designed in the marketing plan.

ported their efforts," Mr. Olszewski says. "We asked them about speakers' programs and whether those helped them achieve their objectives and if they were user friendly. The reps certainly don't impact the content of the speaker program, but we wanted to know if the infrastructure was working and if they were able to get the speaker in the right place at the right time."

"From the agency perspective, it was also important to test the format of the promotional items we were charged with producing," Mr. Grossmann says. "Because there are so many different mediums these days — print, CD-ROM, Web, and so on — we needed to know what formats worked for them and if the materials were understandable."

To address the needs of the field force, the survey asked: Do you find this useful?; How often do you use it?; and, In what situations do you use it? For each question there was a quantitative evaluation. Reps

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 Senior Director of Marketing
 Hospital Products
 Fujisawa Healthcare Inc.

The QIS takes a systematic and a systemic approach. One can't just look at a small element of a whole system and think it will change performance, so we look at quality perspectives in terms of what is working well, as well as the systemic issues that affect performance.

responded by choosing a value between 1 and 5, and a space for comments was provided.

"The comments provided us with concise information about what the data meant and what materials were working well and what needed to be improved," says Steve Villachica, Ph.D., CPT, chief learning officer at DLS Group.

In addition to evaluating the materials, the QIS was designed to identify potential breaks in the chain in job performance. A range of factors affecting performance on the job were evaluated through questions such as: To what extent were you able to apply what you learned during new hire training when you were making calls?; After the new hire training, did you receive adequate coaching and mentoring from your sales managers?; and, Are you getting adequate direction from marketing and sales?

"If the marketing materials were working well but people were taking a lot of time coming up to speed using them, then that was a break in the performance chain," Dr. Villachica says. "Another potential problem that we were able to identify was reps might report that the marketing materials looked really good, but they were not being well-received by customers, or reps might report that they were not able to talk to the people in the organization when they had a problem. Those are all breaks in the performance chain that a decision maker needs to know about."

Collecting both quantitative and qualitative responses allowed the organization to gather additional information to identify problems or opportunities it may not have been aware of.

"Some questions were very proactive, such as what opportunities do you see?; What else would you like to see?; What would help you sell better?; and, What do you think works better with customers?" says Deborah Stone, CPT, CEO of DLS Group. "A group can really seize opportunities through free-form questions."

CHALLENGES ENCOUNTERED

According to Fujisawa and DLS executives, the team identified five challenges that it would have to

DR. STEVE VILLACHICA



overcome to implement the QIS: infrastructure, preparing for the unexpected, generating response, maintaining a systemic view, and solution implementation.

Infrastructure. First, the team needed to create a computing infrastructure to support the QIS. The creation of online survey forms, databases, and e-mailing engines were shown to leverage costs over repeated uses of the QIS, which made it an effective source of reliable information for Fujisawa's marketing decision makers.

Preparing for the Unexpected. The team needed to determine what they wanted to learn from the QIS. They also needed to be receptive to unplanned findings that could add value to the information that the QIS would provide to decision makers. Meeting those needs required a directed and open approach to evaluation. As part of its directed approach, the team specified the questions that the evaluation would answer and the ways in which the team would collect and analyze

data. As part of an open-ended approach, the team used text questions on the surveys and follow-up interviews where participants could make any comments they wanted. DLS Group subsequently analyzed both the quantitative and the qualitative data.

Generating Response. Third, the team needed enough reps and managers to respond to each survey to yield a statistically significant sample. To this end, the team stressed that the confidentiality of all responses would be maintained and used a third-party partner, DLS Group, to collect and aggregate all data. E-mail invitations were sent out under the cover of a highly placed manager in the Fujisawa

DEBORAH STONE



A critical element to the success of the QIS at Fujisawa is the communication with reps through newsletters and POAs about what the company was going to do and what was in the plans.

sales organization. The e-mail included a closing sentence asking anyone who could not complete the survey to let the manager know. DLS sent out reminder e-mails, and when necessary, placed phone calls to representatives and managers who had not returned surveys after the first few days.

These three steps have resulted in a response rate of more than 90% for the surveys conducted to date. (The hospital sales force included 75 sales reps and four managers.) These rates have increased with each administration of a QIS at Fujisawa (three have been conducted to date).

In similar evaluations that DLS Group has conducted for other clients, the response rate has been much lower, in some cases 30%. DLS Group attributes the high response rate at Fujisawa to two factors. Firstly, participants were assured that the marketing group would act on the data provided, which developed a sense of trust. And, secondly, there was a sense of accountability because the e-mailed survey asked participants to contact one of the company's executives if they couldn't complete the survey.

Maintaining a Systemic View. Fourth, the team needed to maintain a systemic view toward improving rep and manager performance throughout the QIS process. Similar evaluation efforts are often plagued by the "problem of the hammer." This problem occurs when "the only tool you have is a hammer, and every problem you have needs more pounding." To ensure that this phenomenon did not affect the QIS, the team focused on using the data to specify gaps between existing and desired performance, to make sure the gaps were worth closing, to identify the causes of any gaps, and to formulate solution mixes that would close the gaps.

This approach allowed the QIS team to investigate issues related to existing marketing materials as well as other breaks in the performance chain. This approach has been received so well that Fujisawa's marketing leaders now refer to the QIS and its results

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Jim Grossmann
VP
Williams-Labadie LLC



JIM GROSSMANN

One of our concerns early on was the “big brother” factor, but ultimately we aren’t interested in who says what. We care about what they say and how to generate improvements from that.

in their meetings. This enables them to consistently reinforce the message that management is listening and responding to the needs of reps and managers in the field.

Solution Implementation. Last, the team needed to implement a mix of performance solutions arising from responses to the QIS, such as: increased practice opportunities in classroom and online training, as well as on-the-job coaching; improved distribution and updates of materials; and enhanced formal and informal feedback mechanisms among senior management and sales/marketing systems to monitor progress and shape expectations.

Specific improvements included changes to national and regional sales meetings, additional newsletter articles, more frequent advisory board communications, and better communications among the sales and marketing teams and senior management.

As these solutions were the result of input from the field, they received the whole-hearted support of reps and sales managers during their implementation.

KEYS TO SUCCESS

According to the team, one of the key elements that made, and continues to make, the QIS system successful at Fujisawa is the participation of a confidential third party that has no vested interest in the products or the materials evaluated, which in this case was DLS Group.

“In the past, when we tried to do a similar exercise we weren’t sure we were getting adequate or honest feedback,” Mr. Olszewski says. “A lot of people are afraid to say that the materials are not on the mark or not good. They might be afraid that negative feedback could hurt them. With a confidential response mechanism, we didn’t have to worry about this barrier, and we were able to gain their trust.”

DLS Group maintains confidentiality by assigning randomized codes for each participant and their responses. Also, the responses are e-mailed directly to DLS and are presented to Fujisawa with no identifying information.

“From a DLS standpoint, we don’t particularly care who says what and we don’t know who these people are,” Dr. Villachica says. “Our job is to put together reliable data coming from the field that Fujisawa then can use to make decisions about what to do with the organization.”

Other factors behind the continued success of the QIS program at Fujisawa are the communication of the survey results to the reps and the actions taken to remedy problems that are identified.

“At every POA meeting with our regions and regional managers we provide an update on the QIS and give them the full report — every question and every answer — and we discuss our plan of action,” Mr. Olszewski says. “We tell them what we are doing to implement the suggestions that we have gathered and the trends that we have seen.”

By providing the salesforce with updates, feedback, and action, Fujisawa is not “pushing” content to the field; instead the marketing group is responding to the “pull” created by the QIS, which has created greater credibility throughout the organization.

“Organizations don’t always provide feedback on information they collect from surveys,” Ms. Stone says. “This creates a push versus pull strategy; marketing and training materials are pushed onto reps, versus reps wanting the materials. Our feedback mechanism and how we collect communications really does generate that pull.”

Mr. Olszewski has found that managers now look forward to the feedback from the surveys because they know it is going to help them with their business plans.

RESULTS AND BENEFITS

To date, the QIS has helped Fujisawa: implement new marketing materials in response to the needs of reps and their managers; revise and bundle existing materials so they are more useful; fix a variety of breaks in the chain that support performance on the job; and quantify a rationale to add or delete programs or materials.

“QIS has changed some of our tactical plans and changed some of our tactical implementations,” Mr. Olszewski says. “Now we make it incumbent upon our regional sales managers to present the materials and how they will be implemented in the field. That is a major change. In the past, we would have product management go to the POA meetings and show the reps the materials for the

first time. We didn’t have the regional manager ownership that we have right now. That is another major difference.”

THE PROCESS: STEP BY STEP

- 1 ANNOUNCE THE QIS**, stressing the confidentiality guaranteed by the third party conducting the evaluation. Repeat this message in all subsequent communications to help ensure the candor of participants’ responses.
- 2 CONDUCT PRELIMINARY TELECONFERENCES** with reps, managers, and product advisory boards to specify the questions and subquestions that the QIS must answer to provide value-added information to marketing decision makers.
- 3 PILOT TEST THE QUESTIONNAIRE** using various advisory boards and managers. Pilot testing saves time and money by ensuring the surveys are asking the right questions and that participants can complete the survey in 10 minutes or less. Pilot testing also helps the surveys to become leaner and more focused, while the project team learns the extent to which participants and decision makers will support the evaluation effort.
- 4 CREATE ONLINE SURVEYS** for reps and managers to complete. This step also includes pilot testing any new survey approaches or item types.
- 5 SEND OUT E-MAILS** to reps and managers to participate in the survey. Since reps and managers are busy, allow a reasonable amount of time for them to respond to the survey.
- 6 COLLECT AND ANALYZE SURVEY DATA.**
- 7 SEND OUT REMINDER E-MAIL INVITATIONS.** These are important tools to obtain a favorable response rate.
- 8 CONDUCT FOLLOW-UP INTERVIEWS**, if necessary.
- 9 COMMUNICATE SURVEY RESULTS** to senior managers and reps.
- 10 IMPLEMENT RECOMMENDATIONS.**

Source: DLS Group Inc., Denver

For more information, visit dls.com.

QIS's impact even extends to Fujisawa's distribution system. In some cases, QIS identified that some reps did not have all the materials they needed and changes were made to improve timeliness of receipt.

"We also heard from our sales reps that sometimes materials were so well received that they didn't have enough, and we were able to track exactly what was delivered and the quantities delivered so a shortage didn't occur again," Mr. Olszewski says.

QIS also is of benefit to Fujisawa's advertising agency, Williams-Labadie.

"From the agency standpoint, direct feedback from the client on the things that we work on everyday is extremely critical," Mr. Grossmann says. "A strategic program that allows us to work directly with Fujisawa's salesforce is great because our job is to help them stay on target. Agencies can often get off target because they work in a vacuum."

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Dr. Steve Villachica, Ph.D., CPT
Chief Learning Officer
DLS Group

LOOKING AHEAD

The success of the QIS in Fujisawa's hospital products division has led to product uptake within three of the company's four therapeutic areas. The system has been totally implemented in the hospital products salesforce, covering the cardiovascular and anti-infective therapeutic areas, and has been piloted with the salesforce in the dermatology area.

Lessons learned from QIS also will be incorporated into programs in the training department.

"The hospital salesforce sells cardiovascular and infectious disease products," Mr. Grossmann says. "With two different

therapeutic areas it is not uncommon that some members of the salesforce would be more proficient in one area or the other; it is

pretty hard to have the same level of product knowledge in both areas. There is a need for reps to be honest about the training that they need, but that is a difficult thing for them to tell their manager face to face or to tell other managers in the company."

Mr. Olszewski plans to expand the use of the system to evaluate the effectiveness of salesforce training for a new product being readied for launch.

"We are halfway through our training program for a new anti-infective product that we will launch in the spring, and we are certainly going to use the QIS to evaluate how the training is going, what the confidence level is in the training the reps have been getting, and where the shortfalls lie," Mr. Olszewski says. "This will allow us to identify and close the gaps well before the launch so we can have the most successful launch possible." ♦

PharmaVoice welcomes comments about this article. E-mail us at feedback@pharmavoice.com.

To see how an evaluation program like the QIS could improve the performance of people and organizations in your company, please contact either:

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