LTEN Learning Lab
Preparing the Tech/Digital Enabled Field Team to Understand the Layered Dimension of Data Analysis and Hybridization
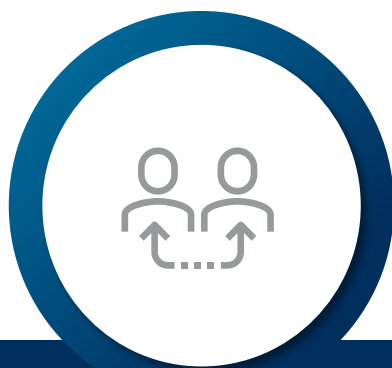### Presented by Dan Snyder & Jon Angello

Learning Solutions from Syneos Health®

June 15, 2022
12:30 PM-12:50 PM
San Antonio, Texas

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Learning Objectives

As a result of this learning lab, participants will be able to:

Understand the process of delivering impactful data and digital enablement training, focused on the 2 critical key dimensions of reach: human (virtual) and digital, with a focus on digital by using omnichannel field engagement to amplify critical human interactions

Identify the critical competencies to instill field teams with the confidence to take ownership of their own entrepreneurial mindset when analyzing data and then orchestrating their own digital and virtual engagement strategies with customers

Make the connection between where field hybridization training now fits within onboarding and advanced training curriculums, also aligning impact of Data Analytics on **Precision, Prediction, Reach, Frequency and Amplification!**

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Empowering Field Force Omnichannel Orchestration

The 3 Pillars

DATA-DRIVEN ANALYSIS

- Entrepreneurial presence and mindset
- Time management
- Business acumen
- Data acumen
- Strategic and critical thinking
- Decision-making and ability to pivot
- Strategic business planning

PRECISE

MESSAGING AND DELIVERY

- Discovery skills
- Understanding the competitive mindset of customers
- Products positioning
- Connecting data intelligence to message delivery
- Establishing value propositions
- Delivering data driven messages
- "Showing up" (empathy/EQ/active listening, presentation skills)

FLUID

PERFORMANCE AND OPTIMIZATION

- Customer and patient journey mapping
- Strengthening relationships across teams and with customers
- Mindfulness/embracing agility
- Driving intuitive customer behavior
- Virtual/hybrid customer engagement
- Storytelling

TANGIBLE

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Making the Connection Between Users and Data Outcomes

Customers:
Engage with content on based on personal preference and needs of their patients. Messaging needs to meet the customer where they are, not where we think they are.

Managers:
Understanding where Customers are in their journey and coaching Representatives on Data Driven Analysis

Data Outcomes

Learning & Development:
Make the connection between where the customer is and the Field Team, providing guidance on data analysis

Representative
Understanding the opportunities through Omnichannel training enablement and strategic account planning

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Data Insights and Opportunities
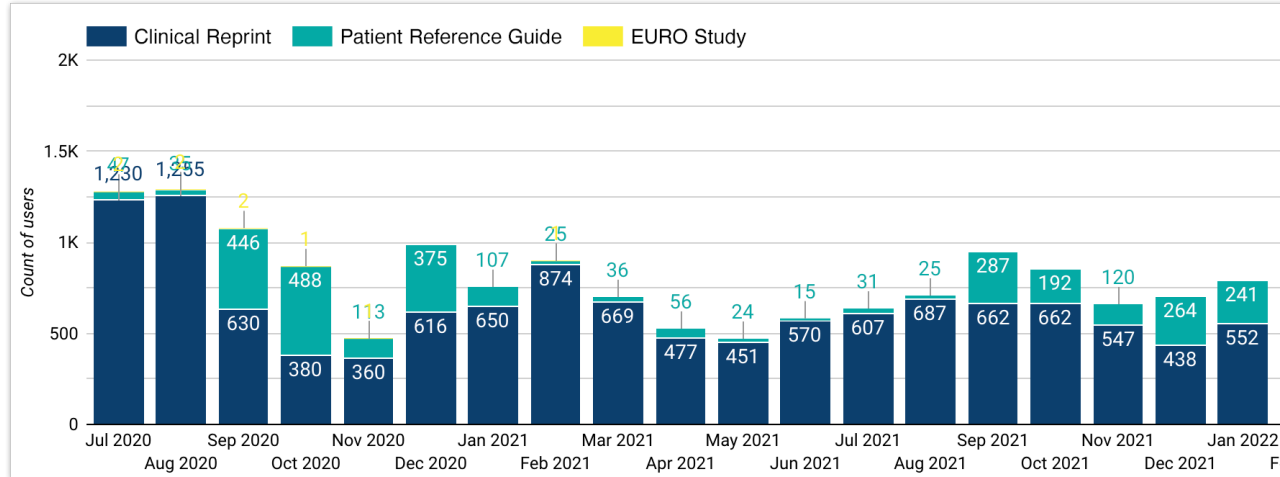
Driven by Customer Engagement

Centralized Ed-Tech solutions that realize the potential of Omnichannel strategies
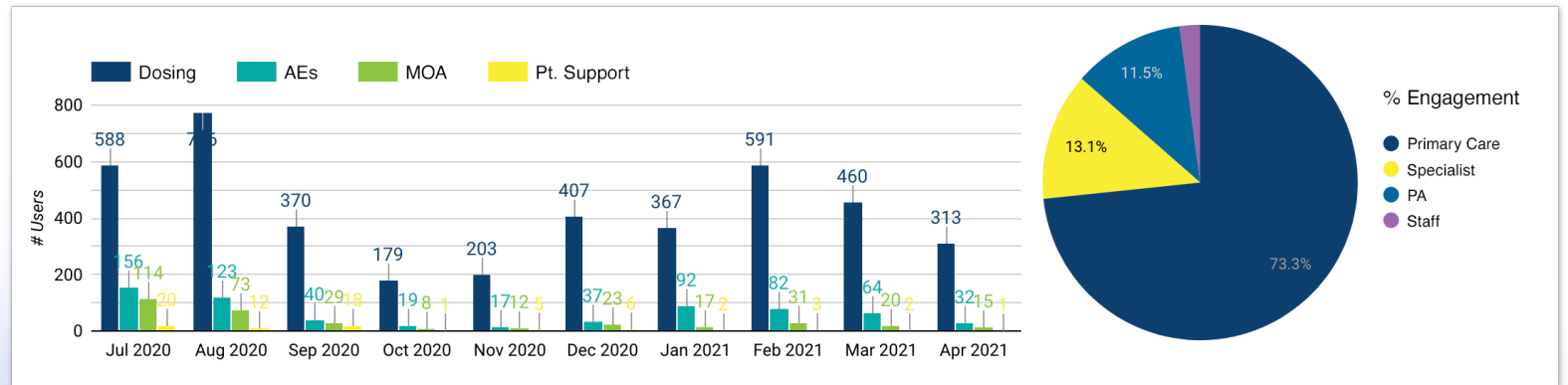
Connecting data sources through APIs

Machine Learning/AI:
Recommendations for next steps with customers and new learning opportunities

Customizable Dashboards guided by data-driven analysis

Customer Engagement by Resource
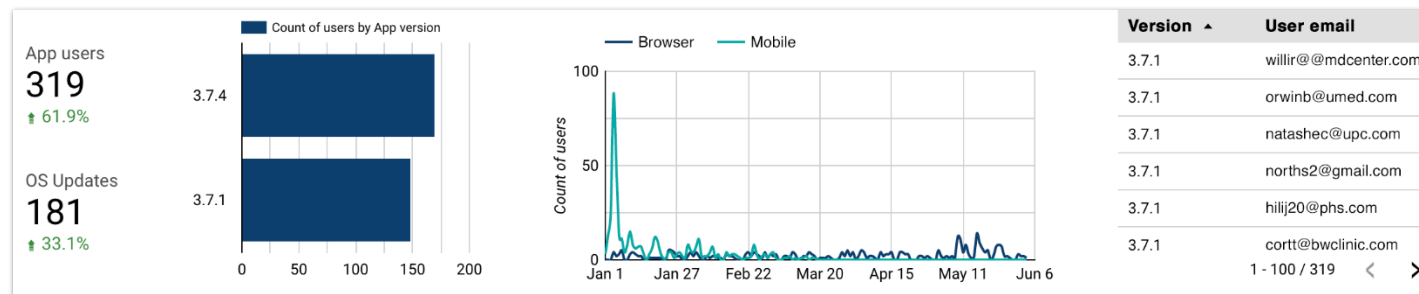

Key Message Response

Building Confidence Through Data and Analytics

Data without application… is just data

1. Support from Training & Development, Data Analytics teams

2. Demonstrated value of technology, data at the ready

3. Effective coaching and support of a data hybridization business plan

4. Curated, relatable content specific to the individual and their customer's needs

Access by Version

App users	Count of users by App version		Browser — Mobile		Version ▲	User email
319					3.7.1	willir@@mdcenter.com
▲ 61.9%	3.7.4				3.7.1	orwinb@umed.com
					3.7.1	natashec@upc.com
OS Updates					3.7.1	norths2@gmail.com
181	3.7.1				3.7.1	hilij20@phs.com
▲ 33.1%					3.7.1	cortt@bwclinic.com
	0 50 100 150 200		Jan 1 Jan 27 Feb 22 Mar 20 Apr 15 May 11 Jun 6		1 - 100 / 319	‹ ›

Data Captured by Version

			3.7.1		3.7.4	Version / Users / Tenants
Device c…	Device op…	Users	Tenants	Users	Tenants
browser	iOS	113	9	170	3
mobile	iOS	53	7	0	0
Grand total		**149**	**10**	**170**	**3**

Active Users by Day

	Event date ▼	User email	Count of sessions
1.	Jun 3, 2022	taylod22@gmail.com	1
2.	Jun 3, 2022	dianea@unitedmed.com	2
3.	Jun 3, 2022	englancs@upc.com	1
4.	Jun 3, 2022	simond8@gmail.com	1
5.	Jun 3, 2022	kaiserg@phs.com	1
6.	Jun 3, 2022	laram7@bwclinic.com	2
7.	Jun 3, 2022	lschnell@edisonhealth.com	1
8.	Jun 3, 2022	hoffmm31@medcenter.com	3
		1 - 100 / 63636	‹ ›

	User email ▼	Number of days active	Count of sessions
1.	zymowski@gmail.com	4	6
2.	zwolenit@unitedmed.com	21	44
3.	zunigar1@upc.com	37	59
4.	zoobm@gmail.com	100	170
5.	zlotkint@phs.com	28	42
6.	ziporaf@bwclinic.com	41	63
7.	zimmel17@edisonhealth.com	24	62
8.	ziegewej@medcenter.com	30	70
		1 - 100 / 3478	‹ ›

Omnichannel Maturity Curve

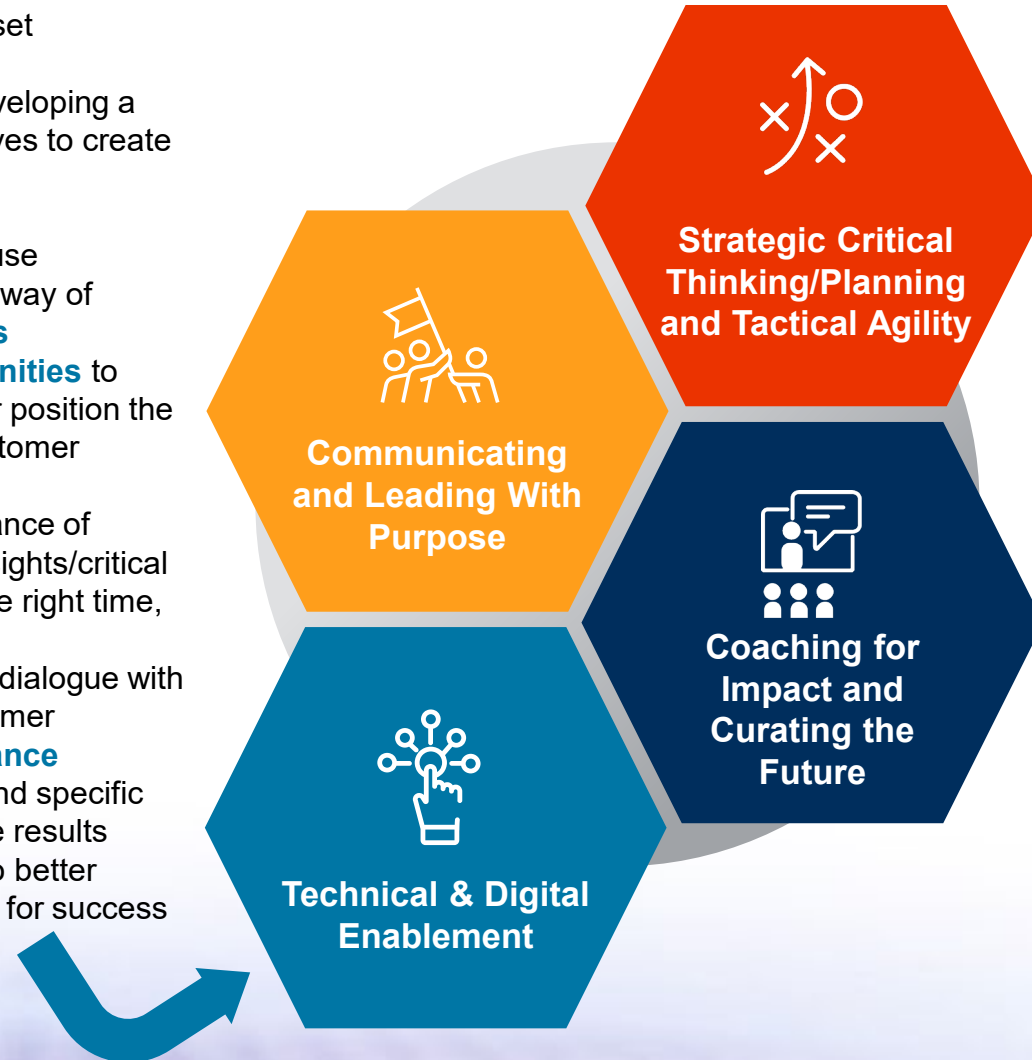|	DIGITAL	MULTICHANNEL	CROSS-CHANNEL	OMNICHANNEL
Automation	Deployed manually	Triggered by transactions	Cued by point in lifecycle	Activated by individual behavior
Data	Siloed by department and channel	Manually connected for specific use cases	Centralized within key departments	Unified at the individual level across all channels
Segmentation	Programs sent to all targets	Segmentation based on specialty	Segmentation based on decile data	Individual identification based on cross-channel behavior
Relevance	One message to all recipients	Message selection based on customer profile	Message selection based on recent actions	Dynamic digital journeys based on individual behavior
Testing	No active testing	Ad hoc A/B testing for specific campaigns	Regular cadence for testing all new programs	Continuous testing and optimization
Analysis	Activity and output	Campaign outcomes and ROI	Performance management and insights	Decision-driving and predictive
Teams	Work independently	Inform other departments	Collaborate across silos on campaigns	Integrate within a well-documented process

IMPROVED PERFORMANCE

Omnichannel Impact on the Field Rep Competency Model

Understanding brand information, messaging, and promotional resources to ensure representatives are positioned to achieve and exceed objectives

Product Knowledge

Orchestrating omnichannel capabilities, leveraging a technology mindset, and **synthesizing data insights** *in order to meet the customer where they are on their journey*

Technical & Digital Enablement

Developing and executing an effective plan for identifying, prioritizing, and addressing territory business issues and opportunities in order to realize performance goals

Collaboration

Accountability

Understanding the industry landscape, the business of medicine, the various stakeholders and influence patterns that exist within the healthcare system; leveraging this knowledge to inform more engaging, relevant customer interactions, engendering trust, and demonstrating exceptional customer value

Marketplace Understanding

Developing and maintaining professional relationships to gain alignment and generate results for business initiatives; building win-win situations to achieve goals and objectives while serving all business partners within the client and Syneos Health

Territory Management

Customer Engagement

Effectively engaging with customers in a relevant and compelling manner in order to meet customer needs while achieving organizational goals

Being responsible for proactively planning and executing on activities to achieve success for self, team, and company

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Omnichannel Impact on the Leadership Competencies & Coaching Models

- Articulates entrepreneurial presence and mindset consistently with the sales team
- Leverages **data insights** by collaboratively developing a strategic business plan with sales representatives to create an innovative, customer-focused approach for HCPs/patients
- Embraces agility by guiding the sales team to use digital/nonpersonal information to change their way of working and **enhance customer relationships**
- Provides the sales team **support** and **opportunities** to develop new skill sets and use of data to better position the product and **orchestrate** impact on driving customer behavior
- Teaches the team the "why" behind the importance of customer experience and the "how" to draw insights/critical thinking when tailoring the right message, at the right time, for the right patient
- Continually communicates feedback and open dialogue with the representatives on their virtual/hybrid customer engagement interactions to **improve performance**
- Encourages the team to **embrace AI output** and specific targeted recommendations in order to get more results
- Demonstrates empathy and **active listening** to better understand what tools and support are needed for success

Strategic Critical Thinking/Planning and Tactical Agility

Communicating and Leading With Purpose

Coaching for Impact and Curating the Future

Technical & Digital Enablement

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Where Data Analytics Will Have Impact on Future Training Curriculums

- Rep/Mgr.'s understanding of how to read dashboards as they evolve

- Ability to generate meaningful insights from data for "next best" action

- Demonstrate agility as AI provides clearer trends and suggested actions

- Capacity to coordinate a unified effort articulating insights from data analysis with key customer stakeholders

- Integration of manager abilities to provide impact coaching aligned to the use of data-enhancing field performance

Advanced Training	New Hire Onboarding	Coaching for Impact

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"Must Haves" to improve Data Analytics upskilling that will impact curriculums moving forward

1. **Specific data analytics training that establishes foundational and advanced skills**

2. **Case study application that includes interpreting data analytics, optimal responses to AI suggestions, and improving powerful virtual customer engagement**

3. **Scenario-based decision trees that move powerful data insights into actionable "next best" steps**

4. **Developing essential data analytics coaching scenarios to improve precision, prediction, reach, frequency, and amplification**

5. **Account/customer-based implementation plans that utilize data insights when coordinating internal communication and collaboration efforts**

Data analytics will point you in the right direction.
Being well trained will improve decision making.

"Where there is data smoke, there is business fire."
Thomas Redman

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