

**ITEN**

# LEVEL UP

YOUR LEARNING, LEADERSHIP & IMPACT



**Certify: Unveiling the Blueprint for Field Proficiency**



**READY PLAYER 1**

**SHARE YOUR FEEDBACK  
ON TODAY'S SESSION**

**CHOOSE THIS WORKSHOP**  
IN THE APP... EASY!

**CLICK ON THE SURVEY**  
AND ANSWER A FEW QUICK QUESTIONS.



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**Certify: Unveiling the Blueprint for Field Proficiency**



**READY PLAYER 1**

**WELCOME**



## Facilitator Introductions



**JENNIFER AIKIN, MSN**  
Principal, Owner and Consultant  
Evergreen Training Solutions, LLC

- Trained as an Oncology APN
- Worked for 20+ years in Medical Training in the biopharma industry
- Also worked as an MSL and Head of Enterprise-wide Training



**KRISTEN JAWORSKI, MSN, FNP**  
Senior Director, Medical Science Liaison  
Spark Therapeutics\*

- Trained as a Family Nurse Practitioner
- Worked as a hemophilia care provider and clinical research nurse
- Biopharma roles: Principal MSL, Medical Trainer, Clinical Research Liaison

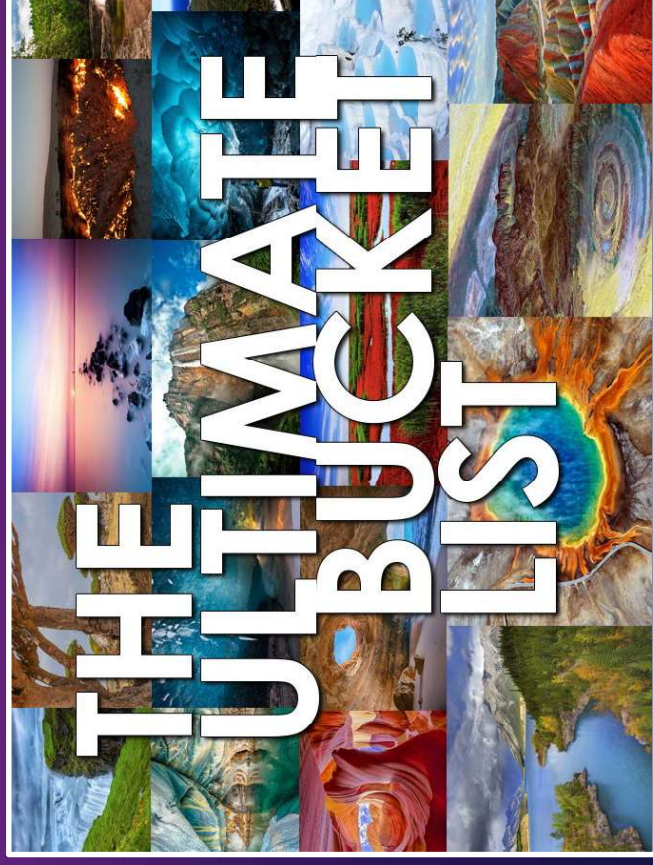
APN, Advanced Practice Nurse; MSL, Medical Science Liaison; NP, Nurse Practitioner  
\* The information being shared is the opinion of the presenter and does not express the views and/or opinions of Spark Therapeutics



## Audience Introduction

Learn more about the dreams and aspirations at your table.

- Share something from your bucket list
- Continue to go around the circle until everyone has shared at least one bucket list item



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NTEN

# LEARNING OBJECTIVES

**Following this workshop, attendees will be able to:**



Understand the role of certification in ensuring optimal performance



Identify what good performance looks like



Incorporate best practices to ensure a successful certification experience



Design a certification process for their organization

# AGENDA

1 Welcome and Introductions

2 Changing the Reputation of Certification

3 Defining What Good Looks Like

4 Incorporating Best Practices to Ensure Success

5 Outlining the Process

6 Q&A and Wrap-Up



# LEVEL UP

Changing the Reputation  
of Certification

# Activity: Word Cloud Questions

On your smart phones or  
tablets, access:

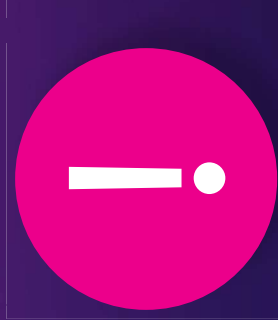
<https://pollev.com/jenniferaikin520>

Consider your field team, what  
words would come to mind when  
they think of certification?

# Best Practices: Changing the Reputation of Certification



**Debunk myths  
about certification**



**Emphasize the true  
value of certification**



**Medical Training  
Exemplar**

## **Large Group Discussion:**

**How can we overcome the negative connotations mentioned in our Word Cloud to create a safe and positive learning experience?**

# LEVEL UP

Defining What Good  
Looks Like

# ACTIVITY: TABLE GROUP WORKSHEET

## Instructions – You have 8 min

1 Each of you has a worksheet with two questions on it

2 As a group, answer each question from either the Medical or Commercial perspective (see tent card)

3 Circle the knowledge and skills that are essential for a new hire to be 'field ready'

4 Choose a spokesperson

**Debrief**



# BEST PRACTICES: OUTLINE EXPECTATIONS



## Work with leaders to outline expectations

- Not just knowledge: include knowledge, skills and compliance behaviors
- Include VP, Head, as well as regional leaders to ensure alignment



## Socialize these expectations regularly

- Review during field ride along visits
- Highlight success and growth on performance evaluations

# BEST PRACTICES: MEDICAL EXAMPLE

**In engagements with Healthcare Providers (HCPs), Medical Affairs employees will seek to provide value to both the HCP and the company by:**



Actively listening to understand HCP's perspective



Asking clarifying questions and probing to get at any underlying concerns and questions



Answering questions and addressing concerns with available data in a fair balanced way, and a comprehensive knowledge of the therapeutic landscape



Pivoting to the key Medical Communications messages and data aligned with company strategy



Focusing on patient outcomes to ensure the safe and effective use of the company's medication



Bringing HCP insights back to the company





# LEVEL UP

Incorporating Best Practices  
to Ensure Success

# BEST PRACTICES: IMPORTANT PRINCIPLES



Goal: Empower learners to succeed



Ensure clear expectations and objective evaluation criteria are communicated



Offer opportunities for practice in group settings with peers



Highlight the potential for growth and learning through the certification process

**BEST  
PRACTICES:  
START WITH  
REAL-LIFE  
SCENARIOS**



Use difficult questions from HCP engagements



Affirm the team's ability to present new or complicated data



Effectively use new visual aids or tools for presentations

# Best Practices: Craft Objective Evaluation Criteria

## Three Topics for Outcomes

- Scientific Accuracy
- Customer or Scientific Engagement Behaviors
- Adherence to Compliance Guidelines

## Objectives

- Create objective criteria for each outcome
- Identify observable behaviors
- Identify knowledge requirements

## Develop Pass/Fail Criteria

- Define criteria for positive results and repeat certification
- Consider using Yes/No instead of a Likert scale
- Develop a plan for any negative results with managers and HR

### Template: Proficiency / Certification Checklist

Name: \_\_\_\_\_

Date: \_\_\_\_\_

Evaluator: \_\_\_\_\_

**Scenario 1:**

Outline the scenario, including a main question and at least one follow-up question

**Did the employee meet the following Expectations?**

Scientific Content:

The employee addressed the following key points:

- Key Point 1
- Key Point 2
- Key Point 3
- Key Point 4

Compliance Criteria\*:

- Provided fair balance (safety, efficacy, limitations)
- Acknowledged when the topic was outside of the product labeling
- Avoided giving medical advice (other than what is outlined in the prescribing information)
- Avoided making direct comparisons to competitors unless head-to-head trials have been performed
- Provided only accurate information, offering to follow up on information not known

Engagement Behaviors\*:

- Asked probing questions to identify HCP's underlying concerns
- Responded to questions clearly and concisely
- Utilized appropriate resources (slides, articles, posters, and other approved documents) when interacting with the HCP
- Engaged in dialog with the HCP for 15-20 minutes

Comments:

Proficiency / Certification Recommendation:

Successfully Passed Certification\*:

- Scientific Content: Addressed all key points listed
- Compliance Criteria: Achieved a "yes" or "not applicable" for each item
- Engagement Behaviors: Demonstrated the majority of the outlined behaviors

Passed with Support\*:

- Scientific Content: Addressed the majority of the outlined key points
- Compliance Criteria: Achieved a "yes" or "not applicable" for each item
- Engagement Behaviors: Demonstrated some of the behaviors listed, but not the majority

Repeat Certification\*:

- Scientific Content: Addressed less than half of the key points listed
- Compliance Criteria: Achieved a "no" for any one item

Evaluator Signature \_\_\_\_\_

Date \_\_\_\_\_

For a copy of the certification template, e-mail [evergreen Trainingsolutions@outlook.com](mailto:evergreen Trainingsolutions@outlook.com)

# BEST PRACTICES: TRAIN THE EVALUATORS



Walk through the approved checklist



Discuss the criteria for each outcome specifying expected results



Include a role-play or videos to discuss ratings



Allow evaluators to ask questions

# BEST PRACTICES: PLAN FOR DELIVERING FEEDBACK



Determine who will deliver feedback



Deliver initial feedback the same day if possible



Detailed feedback should be delivered within one week of the certification experience

# LEVEL UP

Outlining the  
Certification Process



# ACTIVITY: CERTIFICATION STEPS

## Instructions – You have 5 min

1 Different elements of the certification process are written on cards

2 Blank cards are also available for the group to add their ideas/practices

3 Each table arranges the activities in an order that they think works best

## Debrief

# BEST PRACTICE: EXAMPLE OF MSL CERTIFICATION



Minimum requirements identified for field readiness: knowledge, soft skills, compliance



Real-life scenarios were built around common KOL questions



Key publications included in the written scenario



Practice with peers and manager



Train evaluators



Set date based on progress and onboarding timeline



Success led to ~annual certification process for key publications



Included additional skills expected with experienced MSLs



# LEVEL UP

Final Q&A  
and Wrap Up