Fortify Your
Essential Skills

Overview

Medical affairs has transformed over the past decade, evolving from a supportive role into a strategic decision-maker and trusted scientific partner. Medical liaisons need to expand beyond only providing clinical information to customers, and think holistically as a collaborative partner – both internally and externally.

For this reason, success and progression in your career is based not just on your "hard" skills, but your mindset and essential-skills. This workbook will help you reflect on and strengthen your mindset and essential-skills, so that you will better meet the needs of customers in your ecosystem…by moving forward mindfully.

What is Mindset?

The mindset that enables us to reach our Customer Engagement vision…

- has an external focus to better understand and improve the patient experience
- creates solutions in partnership with customers for mutually beneficial outcomes
- plans and executes in a more integrated way across our ecosystem balancing enterprise and therapeutic area priorities
- adapts, grows, and flexes resources and capabilities to where they can have the greatest impact
- embraces iteration to meet evolving customer needs in real-time

Objectives

- Understand how essential-skills can enhance professional and personal development and performance
- Develop enhanced essential-skills in the areas of:
  - Proactivity
  - Curiosity
  - Asking good questions and listening
  - Collaborating
  - Influencing
  - Negotiating
  - Meeting customer needs
  - Accountability
  - Growth mindset

  Plan to apply and leverage the skills to meet the needs of your customers and your business ecosystem

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Process

For each skill, you will:

- Read an article, and/or listen to a podcast or video
- Review the workbook summary
- Complete the workbook activities
- Think about how the skill can enhance your focus on the customer and patient

The program is not linear, so you can choose the skills that you want to review first!

Table of Contents

Total Time: 5.5 hours

Articles/Videos/Podcasts: 3.5 hours

Exercises: 2 hours

Content

The references and resources for this program are publicly available articles, videos, and podcasts, curated by Educational Resource Systems (ERS). Resources were selected to target critical skills identified by the Genentech training department

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Genentech Operating Principles Align With the Essential Skills

In CMG, the company is united behind a single purpose and ambitious vision to partner across the health care system to deliver ever better health outcomes for patients while lowering overall health care costs.

- **I put the patient first, always.** I think and act as if the patient is in the room. I understand how what I am doing benefits patients. If not, I stop doing it.

- **I am obsessed with meeting customer needs.** I put myself in my customers' place and act boldly to bring better results for patients.

- **I am inclusive.** I intentionally seek out and value diversity. I bring my authentic self to work and help others to do the same. I make this a place where everyone can fully contribute.

- **I build a culture of trust. I share information broadly.** I spark robust debate on the topics that matter. I speak my mind and listen intently. I commit to the decisions of others.

- **I have a growth mindset.** I ask for feedback and act on it. I embrace opportunities to gain skills and perspectives to reach my full potential. I develop people who are better than me. I give honest feedback to help others grow.

- **I act with urgency.** Speed matters. I take fast, bold action without perfect information. I recognize what I don't know and seek advice. I co-create, test and iterate to bring the best ideas to life—fast.

- **I am accountable.** I am clear on the outcomes I want to achieve and I deliver. I don't let organizational boundaries get in the way. When I see an issue I fix it or escalate it. I accept failure, not dysfunction.

- **I radically simplify and prioritize for impact.** I invest my time in things that accelerate progress for patients. I stop doing things that don't. I re-use with pride. I don't waste resources. I involve the fewest people necessary.

- **I follow the science.** I act on facts and data not opinions. We go where the science and unmet needs lead us. We pursue the best science wherever it is found.

- **I build our reputation.** I am honest, ethical and transparent in all that I do. My actions set a higher standard for our industry.

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Be Positively Proactive

GEN_001

I act with urgency. I am obsessed with meeting customer needs.

a alamy stock photo

Tom Bateman, Professor of Management at the University of Virginia, describes why proactivity is the foundation for finding and taking action on solutions that create better futures. Examples of pro-action include driving culture change, impacting the external environment and customers, changing the company/ecosystem strategic direction, speaking up in meetings, and even discussing the "elephant in the room" (with positive intent).[1]

Listen to Tom's compelling podcast and you will learn why nobody stopped to move a mattress in the road that was causing a major traffic jam! And how there are always more options that you initially think. Take action.

Listen: Podcast (15 min)

Bateman, T. Management Insights: The Wisdom of Proactivity; 2019
https://www.listennotes.com/podcasts/management-insights/the-wisdom-of-proactivity--vS5G_WkXwu/

Activity 1 (10 min)

What's your mattress?

- Identify two or more specific needs for improvement in your role/ecosystem/market that inhibits meeting customer needs, efficiency, effectiveness, collaboration, or performance.

- Determine if improving/fixing these areas can lead to solutions and better futures.

Areas to Improve	Better Futures if Improved (y/n)
1.	
2.	
3.	
4.	

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Be Curious and Ready to Learn

I follow the science. I am obsessed with meeting customer needs.

People and companies that question are better able to contend with disruptive change in the marketplace or meeting customer needs. Imagine you've noticed some of the processes in your ecosystem/company are not as efficient or effective as they might be, which leads you to ask: "Why are we doing it this way?" or "Is there a better approach?"[2]

Questioning is a skill and a way of thinking; it is our ability to "organize our thinking around what we don't know." [2] Discover why people and companies that employ curious people who ask good questions (proactively!) remain ready to tackle the changing market environment. How might questioning and being curious enhance your interactions with health care professionals (HCPs)?

Read: Article (10 min)

Berger, W. Become a Company that Questions Everything; Harvard Business Review; 2014. https://hbr.org/2014/04/become-a-company-that-questions-everything

Activity 2 (10 min)

Curious _____ (insert your name)

Select <u>one</u> of the needs for improvement that you identified in activity 1 (that if fixed, would have a big impact).

Areas to Improve	Better Futures if Improved (yes)
1.	
Identify 2-3 questions that will help clarify why the problem/issue exists.	
1.	
2.	
3.	

Ask Good Questions and Listen

GEN_002

**I am obsessed with meeting customer needs.
I put the patient first, always.**

We've all engaged in that customer conversation when we didn't understand something and just nodded our head—you know it's true! The curious mindset teaches us to dig deeper and ask a clarifying question, however, there are tips to help us plan and improve the questions we ask.

Most successful and creative people in all fields from science to business recognize the importance of asking incisive questions, because they can lead to powerful insights that inspire us to take focused action. Although there is no "right way" to ask a question, some questions are better than others.[3]

"Bad" questions have factual answers available by online search, need context before they can be answered, are unclear, or lead to a dead end.[3] Imagine asking your supervisor: "Should we consider changing this process?" and he/she replies "no," and moves to the next topic. If that question had been asked differently, with context, it could have led to a discussion.

It's also important to watch out for the enemies of "good" questions[4]:

- Fear (of looking stupid)
- Knowledge (you've already figured it out)
- Biases (you assume how it should be)
- Time

Warren Berger, a leading authority on questions, studied how designers think because they are typically willing to ask obvious questions.[5] Specifically, designers:

- Care enough to find out what people need (read about how a team of designers reinvented the measuring cup, in *The Catalyst's Dance*)
- Combine ideas/thoughts/influences that seem unrelated, for problem-solving
- Commit to bringing ideas to life (and being comfortable with failure)[5]

The good news is that we can all ask better questions, which Berger calls *beautiful questions.* Beautiful questions pull you out of the weeds of what you know…because if you aren't asking the right questions, you'll never get the answers you need. Ground your questions in curiosity and honesty and challenge pre-existing notions.[3,4]

- Instead of asking: "How do we take a 5-step process down to 3-steps," ask "why are we doing this," or "what are some alternatives to doing it this way?"
- Disney conducted a brainstorming session with children about how to improve parades, and one child questioned: "Why do they need to be on the ground?"

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Questioning and listening to HCPs is part of your role every day, and each type of question serves a purpose. In *The Art of the Medical Science Liaison Insightful Questioning and Active Listening (Genentech)*, a variety of types of questions are provided to enhance customer interactions.

- Illustration (paint a picture or "fill in the blanks"): "How would you explain this to your own patients?"

- Clarification (ask about effects or impacts): "Can you tell me what you mean by the medication having too many adverse events?"

- Consequence (focus on the cost of not doing what you recommend): "If this issue persists, what other issues might it cause?"

- Elevating (heighten or broaden issues and highlight the bigger picture): "Instead of talking about these issues separately, what are the larger trends we should be concerned about?"

Other question tools in your arsenal are closed-ended questions, which can be efficient for confirming information and keeping control of the direction of the conversation. There are also open-ended questions, which promote dialogue and help gather critical information. [*The Art of the Medical Science Liaison Insightful Questioning and Active Listening (Genentech)*]

Once you ask a beautiful question, actively listen and ask follow-up questions about what you learn and hear.

Listen: Podcasts, Video (85 min total)

Papadopoulos, N. How to Ask Better Questions. (20 min)
http://www.metalearn.net/podcasts/ml15

Berger, W. The Power of Beautiful Questions. (46 min; or three ~15 minute segments)
https://www.gotolaunchstreet.com/podcast/warren-berger/

Berger, W. The Catalyst's Dance. (23 min or two ~ 10 minute segments)
https://www.leadingauthorities.com/speakers/video/warren-berger-ted-talk-catalysts-dance

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Activity 3 (20 min)

Beautiful Questions

Identify an important customer in your ecosystem. Plan and sequence good questions to clarify customer needs/priorities and collect insights.

- Identify the customer_____

- Brainstorm questions and potential responses and circle the questions that will best uncover customer thinking

Questions	Potential Responses
1.	
2.	
3.	
4.	
5.	
6.	

- Sequence the questions, based on importance, by re-numbering the questions.

Collaborating

I am inclusive. I build a culture of trust. I act on behalf of the whole company, not just my team. I am obsessed with meeting customer needs.

As we move to an ecosystem model in the field, enhanced collaboration internally and with customers will be more important than ever. Collaborations can amplify the positive and/or minimize the negative. While the *why* (the focus) and the *what* (the activities) of collaborations differ widely, the *how* (the process) is consistent.

The Stanford Social Innovation Review published research showing that there are five key activities (the 5 Cs) required to launch and sustain effective collaborations[6]:

- Clarifying Purpose

- Convening the Right People

- Cultivating Trust

- Coordinating Existing Activities

- Collaborating for Systems Impact

These activities help us navigate the dynamics inherent in collaborative efforts and help us work (proactively!) together on behalf of a shared purpose.[6]

GEN_003

Read: Article (10 min)

Erlichmann, D, Sawyer, D, Spence, M. Cutting Through the Complexity: A Roadmap for Effective Collaboration. Stanford Social Innovation Review; 3/15/18.
https://ssir.org/articles/entry/cutting_through_the_complexity_a_roadmap_for_effective_collaboration

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Activity 4 (15 min)

A Fab Collab.

Use your "proactive project" from activity 1 and the activity 4 chart below to develop a clarifying purpose, identify the right participants, and summarize the expected impact of the collaboration on meeting customer needs. Decide how you can cultivate trust.

Activity 1 Project

Project based on areas to Improve (for better futures)

1. _____

Activity 4 chart

Action	Collaborative Project Elements
Clarify the purpose (why?)	
Convene the right participants (who?)	
Collaborate for impact (what impact?)	
How will you cultivate trust?	

Influencing

GEN_004

I radically prioritize and simplify for impact. I build a culture of trust. I am obsessed with meeting customer needs.

Robert Cialdini's video reviews 6 actions that can improve your influencing skills. [7] Give these 6 tips a try as you work to create change within your ecosystem while meeting customer needs.

Skill[7]	What is it?[7]
Reciprocity	If you do something for someone, they are compelled to do something for you. *In the video learn how waiters can get more tips through reciprocity.*
Scarcity	People want more of what they can have less of.
Authority	Reference credible experts.
Consistency	Small commitments can lead to larger commitments.
Liking	People work with people they like.
Consensus	People look to the actions of others.

The PREP method in *The Art of the Medical Liaison Power of Presence (Genentech),* also provides a useful framework for targeting a message within your ecosystem and to your customers.

- Position (what do you believe?)
- Reason (why do you believe it?)
- Example/Explanation/Evidence (what support do you have?)
- Position (what is your conclusion?)

Listen: Video (11min)

Cialdini, R. Science of Persuasion. **https://www.youtube.com/watch?v=kv0sOX6Alrk**

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Activity 5 (20 min)

Chart your course

Complete the chart below with examples of how these 6 skills can be applied to your business ecosystem and how the PREP method can help execute these concepts.

Activity 5 Chart

Skill	What will you do? How does the PREP method help you execute?
Reciprocity	
Scarcity	
Authority	
Consistency	
Liking	
Consensus	

Negotiating | GEN_005

I am obsessed with meeting customer needs. I build a culture of trust.

Christopher Voss, a former FBI hostage negotiator, had one of the most stressful jobs in the world. In this video, he shares techniques that will help you negotiate internally within your ecosystem, as you work to improve the company and meet customer needs.

He reminds us that in any interaction, we only have about 7 seconds to establish trust and competence. As a result, it's important not to waste that time asking questions like: "How are you doing?" or commands like "Tell me what happened."[8]

Chris decodes the real meaning of words during a negotiation. Learn that when your counterpart says "yes," it may not be a *real* yes. Getting a "good no" usually leads to greater insights and alignment than "yes." "You're right," sometimes communicates "please shut up," and "that's right" likely means that they understand and will continue to engage.[8]

Try these questions to get a "good no"[8]:

- Is it unrealistic to ask if you'll…?

- Are you against…?

- Is it a bad idea to…?

If triggering a "good no" doesn't work, get to… "that's right," by gaining alignment on what the other person thinks. It will give you the chance to continue the dialogue. Eliciting "that's right" is also a great tool for aligning with customers to uncover their true needs.

Listen: Video (45 min; or break into three 15 minute segments)

Voss, C. Insider Negotiation Secrets; 4/29/19.
https://www.youtube.com/watch?v=s8oTmfx1c9Q

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Activity 6 (15 min)

That's Right!

- Identify a situation within your ecosystem/company that requires negotiation.

  _____

  _____

  _____

- Plan questions to trigger a "good no." Plan backup questions to trigger a "that's right."

  Question brainstorm:

  1.

  2.

  3.

  4.

- Identify a situation where understanding a customer's perspective will help you uncover their needs.

  _____

  _____

  _____

- Plan questions to trigger a "that's right."

  Question brainstorm:

  1.

  2.

  3.

  4.

Meeting Customer Needs   GEN_006

I build our reputation. I put the patient first, always. I am obsessed with meeting customer needs.

Identifying the needs of customers can be achieved using active listening, good questions, and the essential skills identified in this workbook. MSLs must question to dig deeper than what seems obvious and understand the true customer needs.

There are, however, basic customer needs that apply to most every customer interaction. Rosa Say, an author and blogger, reminds us that when it comes to customer service, we tend to make things much more difficult than they have to be.[9]

This list may read pretty basic, but can you imagine how thrilled we'd all be if this was the customer service that we received? [9]

The Six Basic Needs of Customers[9]

- **Friendliness:** Make the customer feel acknowledged by someone who is sincerely glad to see them.

  – Build rapport with your customers (being careful to not waste their time).

  – Your interaction should be a welcome addition to your customer's day, which will make it a welcome part of your day!

- **Understanding and Empathy:** Ensure that you understand and appreciate your customer's circumstances and feelings. Put yourself in your customer's shoes, especially in difficult times.

  – Customers may be impacted professionally and/or personally by COVID-19 or other issues. Be sensitive and find ways to help.

  – Think of virtual solutions (that are compliant).

  – Listen.

- **Fairness:** Treat everyone in the office with the same level of respect, from the receptionist to the provider to the cleaning crew. Take time to interact with all of the members of the team and show interest in their role and their needs.

- **Control:** Customers need to feel that they have an impact on the way things turn out. And, they may not know about, or care about, policies and rules.
  - Our ability to meet customer needs comes from our ability to find ways to say "yes" (compliantly).
  - Make every effort to find solutions based on customer input and needs.

- **Options and Alternatives:** Customer needs will vary and there may be a number of alternatives to accomplish their goals. Working with customers to find customized solutions based on their individual or practice situation is always helpful.

- **Information:** As you know, customers need to be educated and informed about our products and services, and they don't want to search for information on their own, they look to us as a resource.
  - MSLs have a wealth of knowledge about our products and services. Find out specifically what your customers want to know and why (because knowing why may uncover other needs).
  - Uncover other needs through proper questioning and listening.
  - Observe needs that customers may not articulate!

Listen: Article (5 min)

Say, R. The Six Basic Needs of Customers.

https://www.lifehack.org/articles/work/the-six-basic-needs-of-customers.html

Activity 7 (10 min)

Keep it Simple

Select 1 or more (of the 6 basic needs of customers) that you'd like to focus on in the field. Think of how to better meet customer needs in these area(s) and incorporate them into your pre-call planning.

Basic Need	Customer(s)	Plan of Action
Friendliness		
Understanding and Empathy		
Fairness		
Control		
Options and Alternatives		
Information		

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Accountability

I am accountable. I am obsessed with meeting customer needs.

GEN_007

Accountability is sometimes thought about in terms of attaining individual or team goals; however, it goes beyond management of your own objectives. Studies have shown[10]:

- In the weakest teams, there is no accountability

- In mediocre teams, bosses are the source of accountability

- In high performance teams, peers manage the majority of performance problems with one another

- The health of a relationship/team/ organization can be approximated by measuring the average lag time between identifying and discussing problems

Some tips to let team members know up front that you want and expect them to hold you and others accountable:

- Set expectations[10]

- Tell stories (share good examples)[10]

- Model it[10]

- Ask yourself:[11]

  – Have I been clear about my expectations?

  – Have I asked what I can do to help?

  – Have I taken time to brainstorm solutions and build a plan with my team?

A strong internal team is another resource to help you meet the needs of your customers; however, accountability in meeting customer needs is critical. Use your power to create teams with a customer focus!

Read: Articles (20 min)

Greney, J. The Best Teams Hold Themselves Accountable; Harvard Business Review; 5/2014. https://hbr.org/2014/05/the-best-teams-hold-themselves-accountable

Raffoni, M. Does Your Team Have an Accountability Problem?; Harvard Business Review; 2/10/20. https://hbr.org/2020/02/does-your-team-have-an-accountability-problem

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Activity 8 (10 min)

Who's Paul?

Read the 2 articles and understand:

- Who is Paul? Why was he so hard to find?

- Tips to hold yourself, and others in your ecosystem, accountable (especially in meeting customer needs).

A Growth Mindset!

GEN_008

I Have A Growth Mindset. I am obsessed with meeting customer needs.

One overarching mindset, the *growth mindset,* is critical in helping individuals and teams improve their mindset skills to reach higher levels of satisfaction and achievement. Research conducted over 2 decades, by Carol Dweck of Stanford University, showed that the desire to learn, develop and grow arises out of a growth mindset.[12]

	Fixed Mindset[12]	Growth Mindset[12]
Intelligence/Tendency	Static; tendency to "look smart"	Can be developed; tendency to learn
Challenges	Avoids	Embraces (proactively!)
Obstacles	Gives up easily	Persists
Effort	Sees effort as fruitless	Sees effort as the path to mastery
Criticism	Ignores negative feedback	Learns from feedback/criticism
Success of Others	Feels threatened by success of others	Finds lessons and/or inspiration from the success of others
Goal Setting	Sets goals within reach	Sets challenging goals
Potential Result	Likely to plateau early or not reach potential	Likely to reach higher levels of achievement

Read: Article (10 min)

Yatin, P. Importance of Encouraging a Growth Mindset at the Workplace; Upraise Together; 8/21/18 https://upraise.io/blog/importance-growth-mindset-workplace/

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Activity 9 (10 min)

LEAP…Learn, Embrace, Achieve, Persist!

- Read the article and understand why the growth mindset is critical in today's complex and changing environment.

- Make notes about how the growth mindset can help increase customer interactions and conversations and better meet customer and company needs in your ecosystem.

NOTES:

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Strengthen and Leverage Your Essential-Skills!

The growth mindset is the perfect medium to magnify your essential-skills and all of your skills! It is required for successfully meeting customer needs, conducting business, reaching greater satisfaction…and for becoming a better version of yourself!

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5. Berger, W. The Catalyst's Dance. Accessed 3/9/20. https://www.leadingauthorities.com/speakers/video/warren-berger-ted-talk-catalysts-dance

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