






Provider Behavior Change Communications Program – Self Assessment Tool

Use the questions below to identify initial or ongoing needs for successfully implementing a Provider Behavior Change Communications program. Designate under the appropriate column whether the elements are fully implemented, partially implemented, or not implemented at all. Corresponding modules from the Provider Behavior Change Communications Toolkit incorporating proven best practices in the pharmaceutical industry are listed to the far right.

Section 1: Program Assessment					Comments	Module
1: Organization & Structure	Program Background & Organization					
	Objectives & activities of PBCC program are aligned with the reproductive health objectives of the platform					1.1
	Staff Roles, Responsibilities & Reporting Structure					
	Job descriptions for PSI Field Rep, PSI Field Rep Manager, and other PBCC program staff include PBCC roles					1.2
	Education/experience/skills of PSI Field Rep, PSI Field Rep Manager, and other PBCC program staff align with qualifications outlined in job description					1.2
	Proportion of time PSI Field Rep Manager spends in the field versus the office aligns with designation in job description					1.2
	Workload Models for PSI Field Rep and PSI Field Rep Manager are used to effectively focus staff time & effort					1.3
	Reporting structure of PSI Field Representative and Field Rep Managers is accurately represented in department organigram					1.1
Providers are segmented and prioritized to ensure optimal visit frequency					1.4	
PSI Field Representatives are physically based within their geographic territory					1.2	
2: Comm Materials	Messaging					
	Key messages have been created (from DELTA marketing plan, if available) to inform the development of marketing materials					2
	Adoption Stairway elaborated for each desired behavior with input from Technical, Marketing, Research, Sales, and Health Service staff					2
	Features & Benefits, Value Propositions and Obstacle Handling developed for each service, product and/or behavior					2
	Marketing Materials					
PSI Field Representatives have job aids for each product or service (Features & Benefits, Value Propositions, Overcoming Obstacles, etc)					2	
Effective visual aids and marketing resources have been created with input from Technical, Marketing, Research, Sales, and Health Service staff					2	
3.	Communications Skills					
Training program (or “Learning Map”) in place for Field Representatives					3 - Overview	

	Field Representatives trained to effectively communicate Features & Benefits, Value Propositions and Obstacle Handling for each service, product and/or behavior					3 –Initial Curriculum
	Quarterly refresher or advanced communications skills modules are conducted					3 – Advanced Skill Building
	Information is effectively shared between staff through meetings and other outlets (email, blogging, Facebook, etc) so they can use each other as resources and learn from each other					TBD
	Technology (MIS, GPS, etc) is utilized by field staff to improve communication, planning, and reporting					TBD
	Territory Management Skills					
	Providers within a territory are segmented and prioritized according to performance and potential					3 – Territory Mgmt
	PSI Field Representatives maintain proper visit frequency through calendar cycle planning					3 – Territory Mgmt
	PSI Field Representatives determine visit frequency and monthly schedule according to provider segmentation					3 – Territory Mgmt
PSI Field Representatives use Provider Strategy Planner and Visit Planning and History tools correctly and consistently					3 – Territory Mgmt	
4. Management	Supervision, Reporting and Monitoring, and Goal Setting					
	Field staff performance is routinely measured and monitored by Field Rep managers					4
	Managers conduct monthly Field Visits with Field Representatives and provide coaching on PBCC skills					4
	PSI Field Representatives submit weekly or monthly reports to track visits made to providers					4
	PBCC staff have MBOs in place that include execution of PBCC skills as well as other job functions					4
	A performance improvement process is in place					4
Section 2: PSI Field Observations						
					Comments	
	How are Field Representatives implementing PBCC best practices in the field?					Learning Modules
	Does the Field Representative have a clear plan for the day?					Communication Continuum Planning Segmentation & Prioritization
	Does the Field Representative prepare for each visit? If so, how?					Communication Continuum Engaging Openings
	Does the Field Representative have a clear objective for each visit related to the desired provider behavior change?					Communication Continuum

Does the Field Representative appear to have a strong relationship with each provider? Does the Field Representative know the provider's motivations and needs?					Professional Relationships Uncovering Provider Needs Listening to Learn Communication Continuum
Is the Field Representative actively using open questions to identify provider needs?					Uncovering Provider Needs; Listening to Learn
Is the Field Representative knowledgeable on the product/service/behavior? Can he/she answer provider's product/service-related questions?					Foundational Learning
Does the Field Representative offer tailored solutions to the individual provider's needs and explain the benefits to the provider?					Value Proposition Features & Benefits Uncovering Provider Needs Listening to Learn Communication Continuum
Does the Field Representative ask for a commitment from the provider to implement the solution or desired behavior change?					Closing
If/when the provider objects to performing the desired behavior, does the Field Representative deliver a relevant, effective solution ?					Overcoming Barriers to Change
Does the Field Representative engage with additional stakeholders (e.g., assistants, family members, counselors) at the facility?					Professional Relationships
Does the Field Representative make use of visual aids, brochures, leave-behinds, or other marketing materials?					2 – Communications & Marketing Development
Does the Field Representative commit to specific follow-up when objections or needs haven't been resolved?					Overcoming Barriers to Change Communication Continuum
Does the Field Representative take notes after each provider visit?					Communication Continuum