

# Primary Care Practice Facilitation Curriculum

Module 16: Academic Detailing as a Quality  
Improvement Tool



Agency for Healthcare Research and Quality

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PRIMARY CARE

# **Primary Care Practice Facilitation Curriculum**

## **Module 16. Academic Detailing as a Quality Improvement Tool**

### **Prepared for:**

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# Module 16. Academic Detailing as a Quality Improvement Tool

## Instructor's Guide

Practice facilitator (PF) competencies addressed in this module:

- General skills in conducting an academic detailing session
- Cultural competency for communicating effectively at all levels

### Time

- Pre-session preparation for learners: 40 minutes
- Session: 50 minutes

### Objectives

After completing this module, learners will be able to:

1. Define academic detailing and its purpose in a quality improvement intervention.
2. Become familiar with the content of the *Introductory Guide to Academic Detailing* and the National Resource Center for Academic Detailing (<http://www.narcad.org/>) as resources.

### Exercises and Activities To Complete Before and During the Session

**Pre-session preparation.** Ask the learners to review information in the following: (40 minutes)

1. The content of this module.
2. Farrell S, Fischer M, Avorn J, et al. *Introductory guide to academic detailing*. Boston, MA: National Resource Center for Academic Detailing and Alosa Foundation; 2011. Available at <http://www.narcad.org/wp-content/uploads/2010/12/Academic-Detailing-Guide.pdf>

**During the session.** Presentation (20 minutes)

1. Present key concepts from the module.
2. Highlight key points from *Introductory Guide to Academic Detailing*.

**Discussion.** Ask questions and explore answers with learners (30 minutes)

1. What experience have you had working with an academic detailer? What did you learn from this experience?
2. When would you want to bring in an academic detailer to work with a practice? What would you see your role being during an academic detailer's visit?
3. What were the three most important "takeaways" for you from the reading?



## Module 16.

**A**cademic detailing is peer-to-peer educational outreach. Academic detailing has its roots in pharmaceutical detailing, which was designed to improve prescribing practices by physicians. The peer-to-peer format of these commercially oriented encounters has now been adapted for use to improve care quality, as well as to build priority for change in clinicians and leadership.

The goals of academic detailing have traditionally been to improve clinical practice in a targeted area, usually one involving patient care. The National Resource Center for Academic Detailing trains physicians interested in becoming academic detailers, and several states have implemented academic detailing programs to improve patient safety and quality of care.

Academic detailing sessions are not limited to physicians. They can involve peer-to-peer exchanges in any discipline. You may opt to convene academic detailing sessions for chief executive officers, clinical managers, nurses, medical assistants, health educators, chief financial officers, and others to support transformation work taking place at a practice. For example, an expert nurse care coordinator could deliver academic detailing support to another nurse beginning the same activity to improve his or her performance.

### Why Use Academic Detailing?

Academic detailing's peer-to-peer visits can help build leadership's buy-in to proposed practice changes. Academic detailers can also help staff understand the role of practice facilitators, what facilitators can and cannot do, and how they can help practices implement changes. Practice staff are more likely to accept a message if it comes from someone with their same professional background.

At the beginning of a facilitation intervention, an academic detailer can help accelerate development of trust between the practice facilitator and the practice. An academic detailer can also serve as a role model, someone who has gone through the same process and managed to make improvements in their own practice. This shows the practice that it can be done and barriers can be overcome.

### When Should You Use Academic Detailing?

You can't start too early. As noted in [Module 19](#), an academic detailer can be an asset at the kickoff meeting. Additional academic detailing sessions can be held during the facilitation intervention as needed to support clinical and other types of changes. You can also use them when you run into roadblocks to progress. The detailer can help "shake things loose" in the practice and provide an additional perspective on the project.



Be judicious, however, in calling on your detailers. They are busy people taking time out of their own duties to help others improve quality of care. Make sure you schedule meetings at times that are convenient to them. By the same token, detailing visits should not last too long. Generally, an hour is sufficient. Although an in-person visit is preferable, consider telephone or video conferencing as an alternative, especially if it is for later visits.

## **How Do You Identify and Prepare Academic Detailers?**

You will need to identify physicians and others willing to serve as academic detailers for your practices. An ideal detailer will:

- have experience in the changes you will be supporting at the practice
- have experience working with a practice facilitator
- have experience being a detailer
- be approachable
- be a clear communicator with effective educational techniques
- have credibility in the community
- be an innovative thinker
- be empathetic

If you cannot find a detailer to fit the bill, try asking:

- your program director
- other facilitators—find out with whom they work
- the practices you facilitate—find out whom they look up to
- professional associations

You can also keep an eye out for speakers at conferences or webinars. Even if you don't need a particular area of expertise, keep track of skilled speakers for future reference.

In addition, because so many practice changes require coordinated work of the teams within the practice, from the person who schedules patient visits to the care coordinator at the end of the visit, you will want to make sure that the detailers you engage are prepared to incorporate working with teams into their detailing work.

Before they meet with the practice, brief your detailers on the practice and its goals for facilitation and quality improvement. If your detailer has not been trained and has not been a detailer before, provide him or her some guidance before the first encounter. Ask your detailer to:

- prepare a few key messages before the session.
- tell stories. Paint a picture of what it was like in his or her practice.
- be open to questions.
- be honest. Don't minimize the challenges, but show the practice how they can be overcome.
- be patient. Sometimes it takes practices a while to figure out what they want to know.

## Who Should Participate?

Ideally, the visit takes place with the quality improvement team. At times, however, only a single member or a few members of practice staff will meet with the detailer. This is most appropriate when the detailer is an expert in a specific process that only involves a few individuals in the practice.

## What Is the Facilitator's Role?

Once you identify an academic detailer, ask the leader of the quality improvement team to convene the team to participate in the session. You will facilitate the meeting. Regardless of the detailer's degree or experience, remember that you are the head of the facilitation team and the primary point of contact with the practice. The work you request from the detailer should support the work in which you are already engaged or are preparing to engage with the practice.

Shortly after the detailer's visit, debrief with the practice. Find out what they learned and how they might apply this new knowledge to their practice. Expect to hear, "We can't do that here." Help them think through adaptations that would make it work. Focus them on the assets of their practice and encourage them to think outside the box.

In summary, consider using the following steps in working with an academic detailer:

1. Identify the detailer.
2. Orient the detailer to the improvement project and goals and his or her role in peer-to-peer exchange to create practice buy-in and increase knowledge.
3. Decide who from the practice should participate in an academic detailing visit.
4. Remain the point person or primary point of contact with the practice.
5. Listen to the practice's encounters with the detailer and help translate learning and ideas into practice in partnership with the practice's quality improvement team.

Note: this module is based on Module 10 of the Practice Facilitation Handbook. Available at <http://www.ahrq.gov/professionals/prevention-chronic-care/improve/system/pfhandbook/>