



Understanding Academic Detailing: A program overview

The following steps provide an overview of the Center for Innovation in Academic Detailing on Opioids' (CIAO) academic detailing program, from detailer training to follow-up visits with clinicians.

Academic detailing is a non-commercial, educational outreach method aimed at improving evidence-based patient care. Drawing on the successful marketing techniques of the pharmaceutical industry, academic detailing involves brief, one-on-one visits with clinicians to share the “details” of a drug, device, or best practice. Academic detailers use visually engaging materials to provide tailored, interactive education on the latest scientific evidence, and then, employing principles of behavior change, help clinicians set and meet clinical practice goals.

CIAO is committed to making academic detailing a reality for your organization. Following the process outlined below, CIAO will work alongside your organization to prepare and complete steps 1 and 2. Steps 3 and 4 are then completed by the detailers on their own; however, CIAO will continue to provide ongoing support to both the detailers and program management staff as needed for the duration of the academic detailing intervention.

1. Needs assessment and program preparation with CIAO

In preparation for the design and delivery of your academic detailing training program, CIAO conducts a needs assessment to identify the most critical content areas that will support your organization’s future detailing activities. Also during this time, your organization identifies a cohort of detailers and confirms training dates and other logistics. To learn more about identifying academic detailers for your program, please view our [Recommendations & Considerations for Identifying Academic Detailers](#) guide.

2. Detailers are trained by CIAO

CIAO’s training for the pre-selected cohort of academic detailers covers both clinical content as well as academic detailing skills development. Trainings are conducted by clinicians and public health professionals who have extensive backgrounds in clinical management of substance use disorders and academic detailing. These trainings are highly interactive and utilize CIAO’s academic detailing guidebook, [Opioids and Chronic Pain: A guide for primary care providers](#). Detailers will be provided with copies of the guidebook to reference during training and to use during subsequent detailing sessions with clinicians.

For a group of 5-10 detailers, an example training schedule could be 5 two-hour weekly online sessions. The agenda for each session might then be as follows:

Session 1	Session 2	Session 3	Session 4	Session 5
-Introductions -Academic detailing visits overview -Practice detailing a simple topic	-Deep dive into another topic -Practice detailing that topic	-Deep dive into another topic -Practice detailing that topic	-eDetailing -Detailing logistics -Difficult situations in detailing -Practice detailing	-Evaluation of detailing activities -Practice full detailing sessions, recorded for trainee review

3. Detailers initiate academic detailing visits

Contacting Clinicians

Following the completion of training, detailers connect with clinicians to start forming academic detailing relationships. Once contact is initiated, detailers and clinicians establish a time to meet. Because the nature of academic detailing is different than didactic lectures or “curbside consults,” it is important detailers and clinicians create dedicated time for the visit.

Academic Detailing Visits

Visits are generally one-on-one and preferably in-person. However, due to COVID-19, many are exploring video communication (eDetailing). Initial visits can take 5-60 minutes (typically ~30 minutes). During the visit, the detailer:

- Conducts a needs assessment to understand obstacles and barriers unique to the clinician’s practice
- Reviews content using CIAO’s *Opioids and Chronic Pain* guidebook as a visual aid
- Helps the clinician set behavior change goals related to their clinical practice

Post-Detailing Visits

Academic detailing also entails some administrative tasks, such as documentation of visits. Detailers record logistics, content, and goals from the academic detailing session for their own records and program evaluation purposes—to this end, CIAO can provide a survey tool for tracking visits, if desired. Additionally, a follow-up email to the clinician can serve as a helpful reminder of the content discussed, goals set, and the date of the next meeting.

4. Detailers conduct ongoing follow-up visits

CIAO strongly recommends that trained detailers continue to conduct academic detailing visits with the same clinicians in order to provide ongoing support and further develop the detailer and clinician relationship. These typically occur every 1-3 months so clinicians have enough time to implement the behavior change(s) discussed during the previous session. Follow-up visits may be shorter than initial visits; as such, video visits can be an effective way to follow-up with a provider when an in-person visit is difficult or not possible.

Follow-up visits often include:

- Reviewing goals and progress made
- Identifying barriers if goals were not met
- Setting new goals or detailing on new content areas

Academic Detailer Task Workflow

This flow chart demonstrates the various tasks of an academic detailer when actively meeting with clinicians. The tasks can be divided into 1) the academic detailing visits themselves and 2) the associated administrative work to ensure high-quality ongoing support and robust program implementation.

