# Results from Over 80 World Class Manufacturers Participating in the Speaker Programs Cross Functional Strategy Working Group at Speaker Programs Summit 2025

## Speaker Programs Cross Functional Strategy Working Group Notes

### 1. Driving Speaker Programs Standardization Across the Company

**Opportunities**

- Drive better partnership between content and compliance teams for consults
- Have a P2P Playbook
- Ensure marketing training has a P2P module
- Standardized forms, documents, reviews

**Challenges**

- Marketer turnover
- View of P2P marketer role within org
- Standardize across brands/therapeutic areas; different biz partners = different approaches
- Gaining buy-in from business units to standardize
- Pulling acquired companies into parent company process
- Old habits are hard to change

**Best Practices/Solutions**

- Annual needs assessment by brand; centralized system vs. manual
- Outlining principles with rules-based policies as applicable
- Accountability to "do the right thing"
- Center of Excellence to communicate best practice across biz units
- Build a cross-functional "steering" team
- Steering committee that coordinates all efforts (CMS/Marketplace/Commercial)
- Alignment — Accountability — Central data hub
- Fresh marketing
- Communication across all parties
- Continual training for the field
- Adapting to new technology
- Change management

**Process Elements**

- Needs assessment conducted
- Work cross-functionally for business justification
- Educational justification
- Heat map of target overlaid with heat map of programs/partners
- Standardizing reports
- Pulling in information to measure ROI

**Success Measures**

- SLAs (if appropriate)
- ROI
- How to measure success?
- How to tell the story?

## 2. Applying Governance and Documentation While Processes Are Growing and Changing

### Opportunities

- Procedures updated by Ops with compliance & sometimes legal
- Inspect room rentals & F+B minimums
- Business rules guide developed with compliance for reps & vendor
  - > Includes items from SOP
  - > Pulled through in training/attestation
  - > Helpful to have sales leadership support
  - > Living document — microsite, excel
  - > Policy in Action - scenarios/examples of the rule

### Challenges

- Inconsistent interpretation
- Shopping for answers
- Who will own training?
- Field force is reluctant/learning of training risks/challenges
- Does compliance need to be the only approval agency?

### Best Practices/Solutions

- Need more than emails to document exceptions
- Review with regular cadence
- Identify “super users”
- Having SLAs in place
- Level-setting expectations
- Over-communicating
- Coaching ➜ collaborating environment
- Open to continuous improvement and change
- Governance framework - 3 party vendors
- Who is making the call?
- Using business rules as guidelines for escalations *documented
- Making a decision based on the information you have at the time
- Adapting based on company changes (e.g., sizes, roles, etc.)
- Moving away from “form and understand” to more interactive/learning & provide resources
- Annual training “refresh” + review of policy updates
  - > Role-based
  - > Internal partnerships - “operations is the pull-thru of compliance”
  - > Layers of approvals, as applicable
- Overarching policies with work instructions within the policies
- Annual refresher trainings and new hire trainings
- DocuSign
- Risk tolerance

### Success Measures

- Potential violations
- Centralized repository, work for me not against

## 3. Benchmarking Vendor Management: Storing and Accessing Company Rules Efficiently

### Opportunities

- Consolidating to a list of approved vendors
- Clear expectations
- Vendor training
- Share the breaking stories/apps
- Knowing in-house policies before getting to know vendors
- Alignment/preparation

### Challenges

- ITurnover/lost expertise
- Too much internal "comfort" with some vendors
- Inconsistent/irregular QBRs
- "Inherited" vendors; underdeveloped accountability to SOW scope

### Best Practices/Solutions

- Vendor best practices with clear accountability/regular review
- Periodic review of vendors/roles
- Process for documenting errors
- Need for open & proactive communications
  > It's better for issues to come from vendor rather than through the grapevine
- Need for attention to detail & trust
  > Expectations for white glove service
- After action reviews/debrief
- Being open to the org/clients needs
  > Doesn't have to be done the way it always was
- Comes down to re-education to avoid future occurrences
- Storage of info/SoPs?
- Need common sharing points
- Work as one team
- Be comfortable with tough conversations
- Include an audit clause in MSA
- Incorporate regular benchmarking
- Multiple stakeholders, shared document hosted, clear ownership to establish roles, responsibilities
- Process documentation, helps mitigate risk
- Reflected in biz rules
- Define principles, address exceptions/escalations
- Centralize document, socialize to team
- QA creates pathway to success. Ensure site with most relevant document
- Ownership belongs to a smaller group

### Success Measures

- Brand satisfaction
- Sales satisfaction
- QBRs, convos with business heads
- Define business need, identify preferred partner
- Define expectations, SLAs, KPIs, roles & responsibilities
- Dashboards that make sense for company needs
- Stakeholder surveys to assess vendors, anonymous, personalized "swipe"

## 4. Gathering Metrics When Working Cross-Functionally

### Opportunities

- Utilize/track programs with payment tied to attendance
- Centralization where appropriate
- Align with what's needed from analytics team

### Challenges

- Consistency in how data is pulled and interpreted
- Resources to analyze data & follow up
- Sometimes too much data/info!

### Data Points to Track

- Tracking things like canceled programs & associated spend
- Supplementing through qualitative data
- How many exceptions? How many programs?
- # of speaker cancellations
- Determine "educational gaps"
- Attendee numbers, impact, Ad boards etc.
- Are they learning?
- Program success? Cancellations?
- Do reps transfer success?
- Managing speaker utilization?
- % of rep's speaker utilization
- Different streams that make an impact; easier if tied to specific business objective
- Quality of feedback

### Best Practices/Solutions

- Group focused discussions
- Dashboards
- Field reviews
- Share data points
- Debrief weekly across team
- Compliance vs. Marketing data - all roles getting what they need
- Interpreting data into actionable steps
- Individualized reporting based on business need (mktg vs. ops vs. compliance)
- Ops generally make reps do this. How do we fix this?
- Provide recommendation for delivering the news
- Understanding cross-functional strategies
- Include cross-functional partners in bigger topics
- Add our recommendations/insights to data
- Annual review of biz rules
- Internal training not being the experts
- Track all training/challenges to ID

### Success Measures

- Disciplined usage
- Vendors tend to go to metrics of programs
- Measure success ➜ quality of feedback
- RSVP vs. actual attendees
- Good data is key