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ADVISORY BRIEF

How to Lead and Develop High-Performing Field Matrix Teams

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November 2022

Introduction

Many life sciences companies design customer engagement models that rely on coordination and communication between Account Managers, Sales, Reimbursement, Patient Services, and Field Medical to drive outcomes, performance, continuity and improve the customer and patient experience. These collaborative field teams are often formally or informally referred to as matrix or **matrix-based field teams**, and tend to be organized by Integrated Delivery Networks (IDNs), ecosystems and/or geography.

The challenges and complexities of operating as a high-performing matrix team seem easier to articulate than the capabilities and competencies needed to succeed.

Executive stakeholders from Field Leadership, Brands and Market Access functions have shared during benchmark interviews **that operating more effectively as matrix teams is a critical success factor.** The challenges and complexities of operating as a high-performing matrix team seem easier to articulate than the capabilities and competencies needed to succeed. Common challenges include separate field-based roles engaging with the same customer and site of care too frequently, too close together; fears of compliance violations; conflicts within matrix teams around roles, responsibilities and swim lanes; unclear or inconsistent direction and accountability; and misaligned incentives.

In fact, searching online for "field matrix teams" in life sciences industry results in pages of job postings all requiring experience leading or managing field matrix teams, though no articles or resources on the topic are included. *(Go ahead, try it.)*

Clearly, leading and developing high-performing field matrix teams is a coveted skillset, but much less clear is what success looks like, how to achieve it, and who will lead the organizational change from current to future-state.

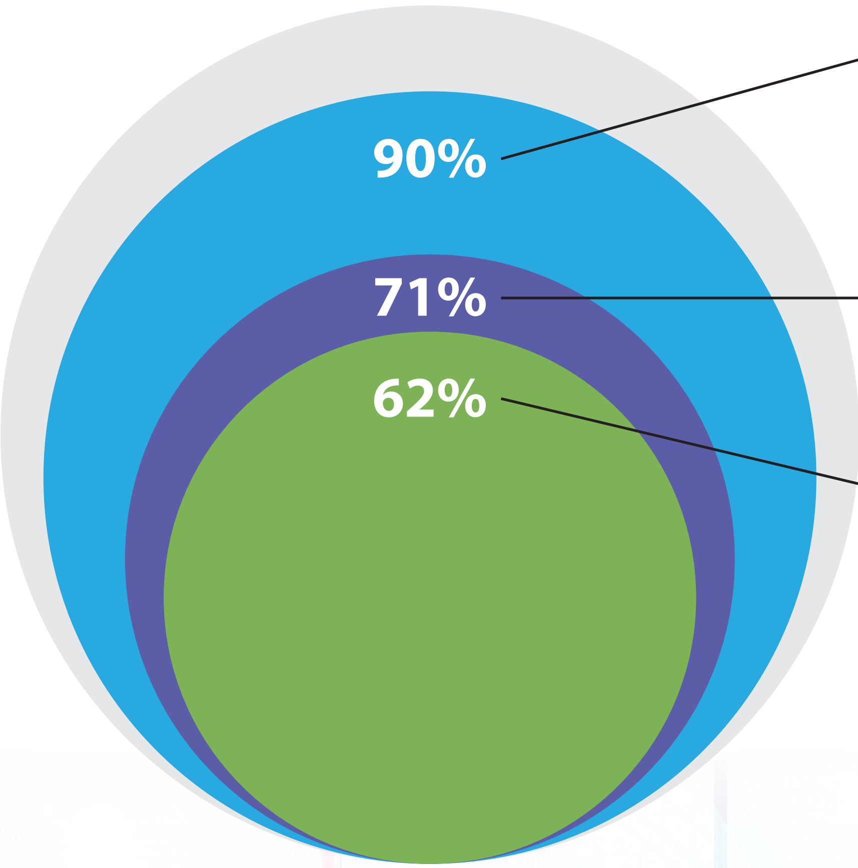
To assist leaders in life science organizations to accelerate progress, TGaS Advisors identified:

1. ROLES considered part of field matrix teams
2. CAPABILITIES of high-performing field matrix teams
3. Specific role-based SKILLS and COMPETENCIES necessary to improve performance of field matrix teams

In September of 2022, TGaS Advisors sent an electronic survey to L&D professionals within life science companies. Surveys were completed by 21 individuals from 18 unique companies. Twelve companies (67%) were mid/large tier, and six (33%) represent emerging/small tier companies.

Results

95% of respondents' organizations have customer engagement models that rely on coordination and communication between Account Managers, Sales, Reimbursement, Patient Services, and Field Medical to drive outcomes and performance.



90% of field matrix teams include:

- Account Managers
- Field Sales/Demand Generation
- Medical Science Liaisons (MSLs)

71% of field matrix teams include:

- Field Reimbursement
- Patient Services/Support Roles

62% of field matrix teams include:

- Thought Leader Liaisons/Regional Customer Marketers
- Specialty Pharmacy/GPO/Trade/Contracting Roles

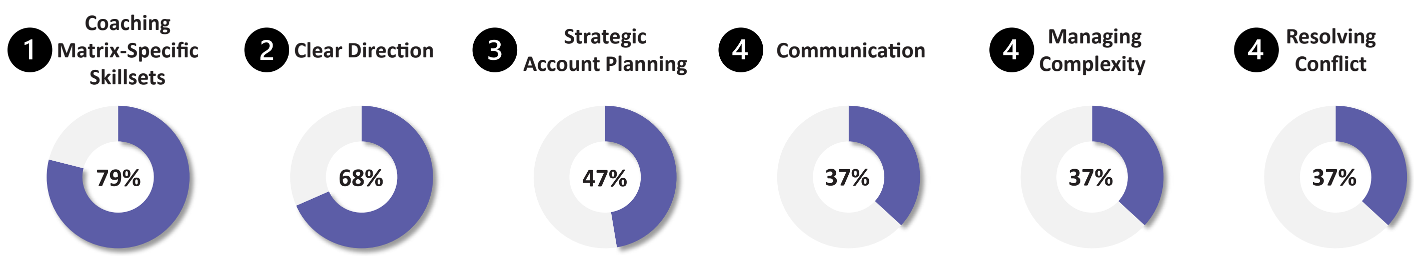
Capabilities of Teams

What does a high-performing field matrix team look like? Can the team share a common definition of performance capabilities?

Below are the 5 most important CAPABILITIES for high-performing field matrix teams (not individuals)

Competencies of Managers

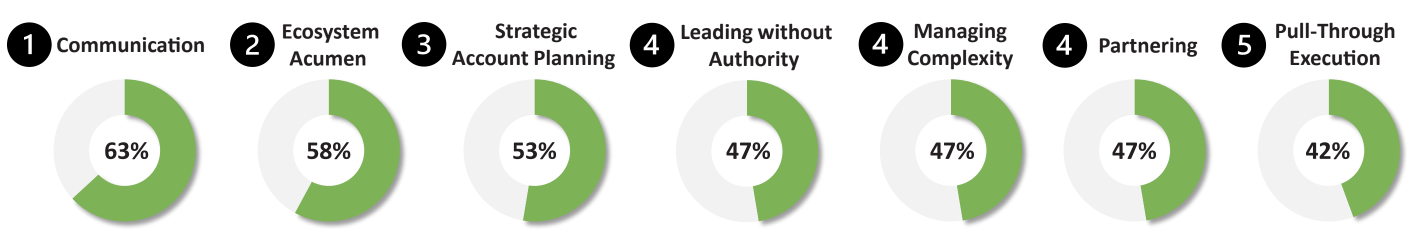
Regardless of whether ownership and accountability are clearly defined, functional managers ought to have the most important competencies to lead high-performing field matrix teams.



Competencies of Customer-Facing Individuals

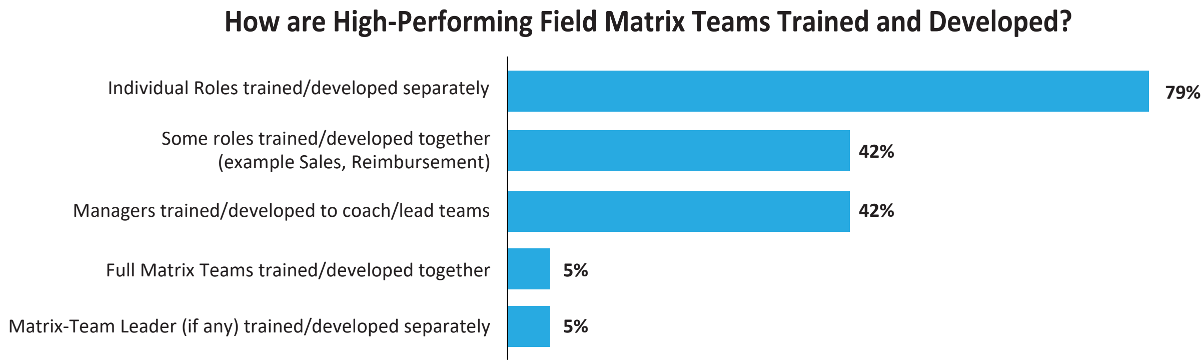
If managers are expected to coach matrix-specific skills of individuals on their teams, which should they be?

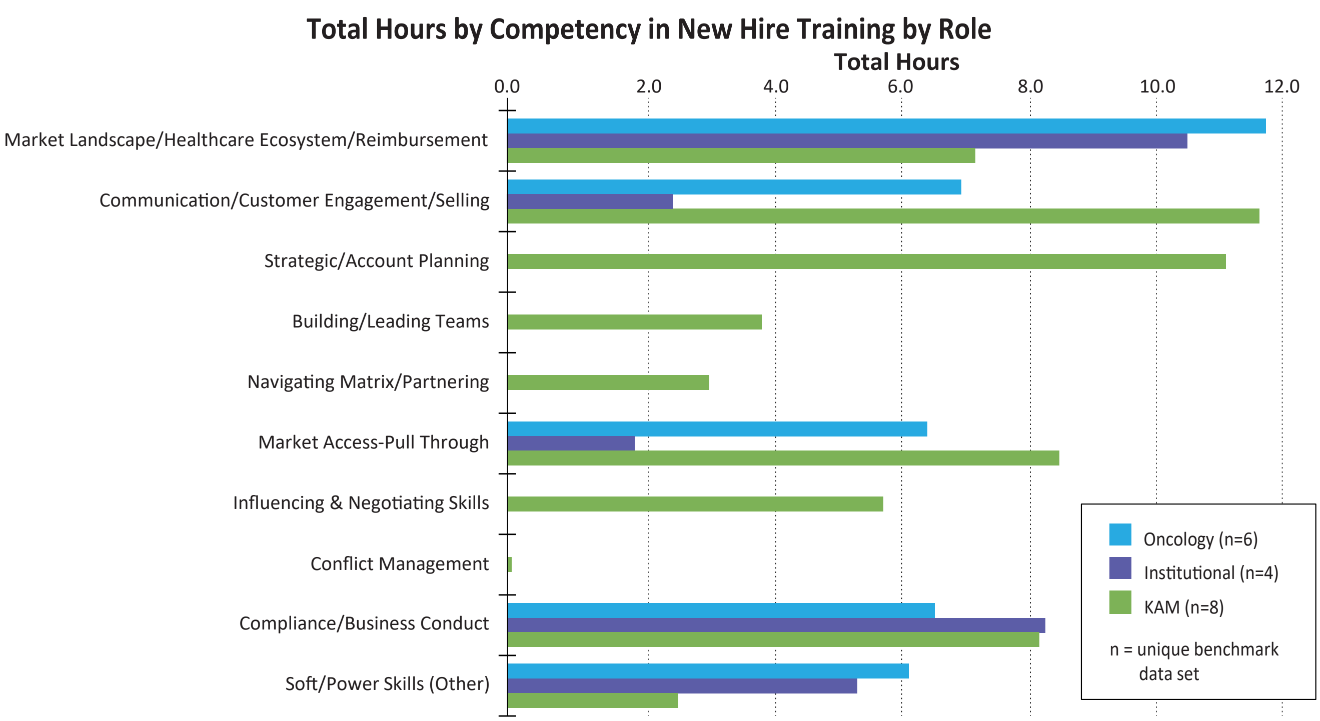
The most important COMPETENCIES for individual roles within high-performing field matrix teams:



Executives that include high-performing field matrix teams as a critical success factor might be surprised that:

- Only 11% of Learning and Development departments have dedicated expertise in training and developing field matrix teams, and
- Only 5% of full matrix teams are being trained together



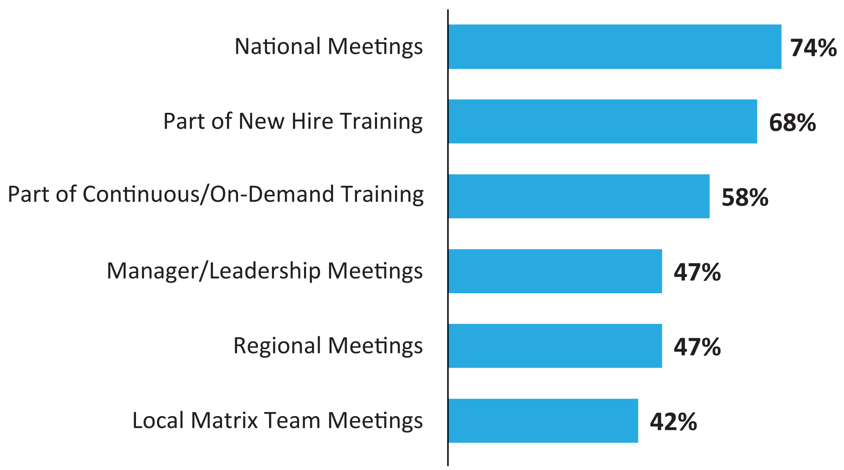


According to TGaS L&D Benchmarks 2019-2022, **the maximum amount of time allocated to a matrix-related competency during new hire training is 11 hours**, which likely doesn't specifically address dynamics of field matrix teams (yet)

L&D Leaders are the tip of the spear in collaborating across stakeholders and teams to ensure all phases of training and development include evolved competencies and skills, and that individuals have access to matrix-based scenarios and skill application.

- Each role should be shown the same **Rx-to-Refill "what good looks like"** process with all customer, payer, patient and fulfillment touchpoints, transitions, and decisions.
- Each role should understand and appreciate **what happens upstream and downstream** of their own step in the process, of the customer, patient and caregiver experience.
  - A simple (well-scripted) video can be leveraged across roles, phases, and platforms. (product-agnostic might get it approved more quickly)
- The **most common use cases** should be leveraged for critical thinking, problem solving and communication skills practice and reflection. For example,
  - Create a formulary or access win use-case and clearly define what is meant by pull-through; expectations of each role in it; how success will be defined; how common challenges will be addressed.
  - Senior members and managers can work through managing conflict and leading without authority scenarios.
  - Balancing field-based and phone-based interactions with providers, payers and patients will provide deeper context and application within the teams.
- Determine **when and where** field matrix teams will receive training and development and design a comprehensive curriculum, including clear learning objectives with calibrated behavioral scorecards to measure improvement over time.

When/Where are High-Performing Field Matrix Teams Trained and Developed?



Path Forward:

How to Lead and Develop High-Performing Field Matrix Teams

1. Gather key leaders and decision-makers across Commercial, Field Leadership, Access, Reimbursement, Patient Services, etc.

2. Clarify rules of engagement, SOPs, roles/responsibilities, decision-making authority, direction, ownership, and accountability of your customer engagement model 's implementation

3. Validate the expectations and desired behaviors by role to inform skills and knowledge curricula

4. Validate expectations of first line field leaders to inform coaching frameworks

5. Design comprehensive metrics strategy to measure effectiveness and impact of field matrix team training and development focus

6. Build essential capabilities within your L&D team by upskilling, strategic partnering, leveraging contractors, and creating flexible/agile work teams that can operate in one-to-many environments

Author

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Kristin has over 25 years of pharmaceutical and healthcare market experience with specialization in institutions, integrated delivery systems, strategic marketing, reimbursement, operations, and performance improvement. Kristin brings a record of success in pharmaceutical Sales, Learning & Development, Reimbursement, and Marketing roles with Janssen Pharmaceuticals.

Prior to joining TGaS, Kristin spent eight years working directly with life sciences brands, medical affairs, market access teams and institutional sales leaders to assist and advise them on accessing and penetrating the acute care market space. Kristin obtained her Six-Sigma Greenbelt certification leading a pharmaceutical improvement project. She has published several articles in trade magazines, including Pharmaceutical Representative, Life science Trainers Education Network (LTEN) and Medical Marketing & Media. She is a Healthcare Businesswomen's Association member.

Kristin received her BBA in Marketing and Management from Loyola University in Maryland and also studied International Business in Belgium. She earned a Certificate in Strategic Management: Competitive and Corporate Strategy from Wharton Executive Program and a Business Process Management Certificate from Villanova University.

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As always, TGaS will continue to focus on the emerging trends in L&D. Please reach out to any member of the L&D team if you have questions or need additional information about any of the topics discussed in this landscape.

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