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Why is this workshop useful to you?

Most STEM PhDs think immediately about jobs in research and development as their first (and sometimes only) option when it comes to careers outside of academia. Yet we are overlooking many other diverse and rewarding careers by focusing only on R&D, while potentially not capitalizing on our own personal strengths.

In particular, there are jobs that STEM PhDs can consider which directly partner with, educate or help the customer, client, partner or audience of an organization, making an immediate and personal impact on your market and mission. Field Careers emphasize the importance of genuine, personable relationship-building, communication skills, technical knowledge, self-management, and leveraging both subject-matter expertise and emotional intelligence to meet with, educate and train people.

STEM Field Careers span multiple departments - from Medical Affairs, to Client or Customer Service or Support, to Field or International Sales. They are found in almost all companies with a national market or international presence. With field-based experience, PhDs can quickly learn how businesses operate, hone their client-facing skillsets, and position themselves for a variety of next steps within the professional world.

What will you learn?

You will learn why STEM field professionals are important to the success of their organizations; what they do on the job, and what career paths and experiences can be built upon obtaining field experience.

What will you gain?

- You will be challenged to complete bite-sized assignments that give you a taste of work that many STEM field careers have in common.
- You will get a personal view of what field careers are like; their pros and cons; and talk with people who can share their perspectives with you.
- You will understand better if you should consider a field career for yourself.

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Exercise 1: Prospecting, Part 1 (Leads and CRM)

Prospecting is one of the hardest things any human on earth has to do: reach out consistently to strangers and ask for their time and attention, with the ultimate goal of getting them to agree to something. It could be agreeing to purchase a service or product that would improve their lives, or agreeing to a proposal, collaboration or idea to work on together. And yet, because prospecting is a skillset that few people - let alone academics - practice and execute well, it's why field professionals who rock at prospecting are paid well, and can build themselves a successful, satisfying and financially lucrative career.

Prospecting is simply a fancy term for "reaching out". Just like in the days of the Old West in the US, prospectors panned and searched for gold. In the business world, we are still prospecting for gold - only this time, it will be in the form of new customers/clients or partnerships.

Salespeople are typically the ones you may first think of when the term "prospect" comes up in a job posting, since salespeople by definition must prospect to sell a product or service in their market. However, understanding and improving prospecting skills can also assist field application scientists, MSLs and business development professionals (as well as marketers, entrepreneurs and CEOs) in reaching out to strangers to achieve their goals. Whether you are trying to reach future customers, new customers, physicians, the press, partners, sponsors, clinical trial coordinators, collaborators or sponsors, understanding how to prospect will be a valuable skill that puts you above other candidates you compete for jobs with.

Exercise Instructions:
1. Pick a scenario and identify a real company in one of the following 3 categories:
   a. **Salesperson** in a life science or engineering equipment company (select a specific product line from that company to represent; e.g. Hana Single Cell Dispenser from Namocell)
   b. **Medical Science Liaison** (MSL) at a pharma company (select a specific clinical specialty/therapeutic area and a specific drug to represent; e.g. neurology, EPIDIOLEX® (cannabidiol) from Greenwich Biosciences)
   c. **Application Scientist or Application Engineer** in a life science or engineering equipment/software/service company (select a specific product/service from that company to support; e.g. research software, MATLAB from Mathworks)
2. Create a spreadsheet on Google Sheets. This is going to be your **CRM** (customer relationship management system, which every company has to track and manage customer accounts or relationships).
3. Label the top row with the following: First Name, Last Name, Email Address, Title, Focus/Specialty, Sector (e.g. Hospital, University, Company, Government, Nonprofit, Startup), Notes, Date Contacted (and any other attributes you find helpful to track individuals).
4. For your role, identify at least **15 individuals** you do not already know, whom you can theoretically reach out to.
   a. **Salesperson:** identify potential customers who might be interested in purchasing your product. Who would you look for? What titles and institutions would you start with and why? Where would you find them? How would you find their contact information?
   b. **MSL:** identify physicians you could partner with who could participate in running a clinical trial for your drug (pretend the drug is pre-launch). Also identify key opinion leaders (**KOLs**) in your disease field who would be excited by your drug.

> Where would you look for physician or KOL information? How would you know if a physician has done clinical trials in the past? How would you find the contact information for these people?
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> c. **Application Scientist/Engineer:** you are tasked with helping to crowd-source instructional content for your company's customer knowledgebase (a database your company is making for your customers, containing useful protocols, instructions or processes which will help provide more utility from your product or service). You need to identify potential guest contributors and ask if they would like to participate. Look for potential contributors who have relevant knowledge to provide to the product/service (ideally people who are innovative and would be highly respected in the field) and could contribute knowledge that would be useful, relevant and exciting for your customers. How would you find these people? How would you figure out if they are the right contributor that could provide useful information for your company's customers and might be interested in helping out?

5. Fill in the contact information in your CRM. Include at least an email for each contact.
6. Congratulations! You have now completed Part 1 of Prospecting! Note your questions, observations and comments for discussion during the workshop.

Exercise 2: Prospecting, Part 2 (Targeted Messaging)

1. Now that you have your list of contacts, it's time to contact them! (hypothetically)
2. To respect the time and priorities of your audience, you should tailor your cold reach-out message to each person at least a little bit, so they are more likely to respond to you.
3. Open Google Docs and draft at least 2 different email messages introducing yourself and what you are hoping to get from your contact. You may wish to draft a different message to try different wording, or phrase your request differently depending on particular attributes of your contact (e.g. a PI vs a department chair; a person from a company vs a person from a patient advocacy group).
   a. **Salesperson:** goal - get a meeting on the phone or in person to chat about the product/service and potential impact on the contact's (otherwise known as a Lead in sales terms) projects.
   b. **MSL**: get a meeting on the phone or in person to chat about your drug and potential impact on their patients. Your job will be to educate the physician about either the new drug, or a new indication being targeted by the drug (again, pretend that this drug has not yet been launched into the market).
   c. **Application Scientist/Engineer**: get your contact to agree to contribute to the company knowledgebase, with a potential phone call to clarify details.
4. In real life, you would send these messages, but in this exercise, instead, please read about using Mail Merge for Microsoft Office (a way to simultaneously send emails to multiple people automatically). In most companies, they will have a software platform that may do this function for you.
5. Bring your questions to the workshop about what you found interesting or challenging about this exercise!

Exercise 3: Qualification (Field Sales)

The main responsibility of the Technical Sales Representatives, is, unsurprisingly, successfully selling the company's product. A technical sales rep often serves as a consultant, helping the customer to identify which of the company's offerings is the best fit. The process of uncovering the customer's needs and finding a solution is called qualification. To make a sale that will leave the customer satisfied, the rep must understand the customer's current and future scientific goals and needs for technical support, as well as the budget and purchasing timeline. A sale is also an opportunity to learn more about the customer's organization and to set the ground for future sales by identifying more leads or by better supporting existing customers. In the exercise below, you will write a stage-by-stage plan for a qualification.

Exercise:

Pick a company and product line that you are representing. You are meeting a customer who is interested in one of your offerings. Your goal is to find out what product will be the best fit for your customer's needs and budget, and to persuade the customer to further consider this product.

Note: This exercise will work best for companies with a range of fairly advanced products (e.g. microscopes, complex software systems, plate readers, fabrication systems, etc). Pick products you are familiar with.

1. How will you prepare for the meeting?

Hints:
What do you need to learn about the customer?
What activities do you plan to conduct during the initial meeting?
What can make the meeting more productive and enjoyable for the customer?
What is the desired outcome of the meeting?

Deliverable: Organize your answers into a bullet point list or other easy-to-read note

2. What questions will you ask to find out if it's a good fit?

Hints:
Why is the customer looking for a solution?
What are the technical requirements?
Are they familiar with the application?
When do they need the solution?
What can they afford?

Deliverable: Make a list of questions and add it to you note.

3. What will be your next steps after the meeting?

Hints: These can be as simple as a thank you message and sending a quote, or as involved as organizing a seminar or a product demonstration - pick what is relevant in your situation.

Deliverable: Describe an outcome of a hypothetical customer meeting (it can be answers to your questions from part 2). Based on what you learned at the meeting, draft a follow-up email to your customer.

Bring your questions to the workshop about what you found interesting or challenging about this exercise!