

## Have Successful Dialogs with Lead Users

I will address some of the important issues in my own experience -- much of it gleaned from failure, like most valued experience -- that must have your attention if you're to make dialogs with lead users (LUs) in medical domains worthwhile.

**Know your stuff.** First things first. You absolutely must be well informed on the topics of interest, otherwise your future dialogs are doomed to failure. Simply put, you must be able to hold your own with experts (by definition) in the field. Do the necessary research: Understand clinical needs, current standards of practice, emerging methods, leading suppliers, regulatory and reimbursement climates, emerging technologies, and new players -- just to name a few prerequisites. There are lots of ways to do this, and you probably know them all so I won't bore you.

**Identify the right people.** This is obvious, critical and quite easy. LUs, at least in medical domains, usually publish and they are often quoted by journalists. Furthermore, one will often lead you to others. A bit of careful desk research will identify the individuals who are likely to be LUs, or it will at least stimulate some networking that achieves that end.

**Provide incentives.** Why would these clinicians want to waste their valuable, billable time talking to you if they don't know you? (Don't limit yourself to people you know; that's not going to get it done.) You need to reach out to the target community of expert users in the space of interest. Those clinicians will care about two things: (1) a topic which is in the sphere of their vital interest and expertise and (2) compensation for their shared insights and time -- not because they need the money (they don't) but because they need to know that you are serious and respectful of their contribution to the field of interest. You will find some expert physicians who will talk to you gratis, but you won't find enough of them quickly enough.

**Craft a compelling invitation.** Here's the secret stuff. Lay it out. Dive into the detail to let each prospect know that you (1) know the territory, (2) respect their contribution, and (3) are aware of the pivotal issues affecting the future. Do it with brevity, professionalism, and lack of pretense. Offer a precisely defined incentive up front. Don't be coy. And, make it clear that you are willing to share not just cash but potentially useful information gleaned from other respondents. I like to use email for these invitations because most LUs use email, it's relatively non-intrusive and time-insensitive, you can make your case concisely and precisely, and you need not concern yourself with gatekeepers.

**Beware personal biases and ulterior motives.** We all have biases and personal objectives, certainly including LUs. Just recognize that these biases and motives exist, try to divine what they are in the course of each interaction, and plan to compensate for them. (One common motive among research-oriented physicians is their interest in conducting clinical trials.) For LUs the most important influences are professional, at least within the context of the dialogs we're talking about here. These experts want to be influential and have their strongly held views widely recognized and appreciated by their peers because these views are central to who they are and what they do. After interviewing five or ten of these folks, you should be able to account for these leanings and home in on "truth". This ability to sort wheat from chaff is much more art than science; it just seems to come with experience.

**Can the sales pitch.** You're not trying to simply make a sale with this conversation (you're not, right?). You are attempting to exchange valuable information, so do nothing that will raise the suspicion of your respondent that you're just wasting her/his time. For this reason it's usually best to not take on this task yourself if you represent a supplier of products in the domain of interest. Of course, you could just misrepresent your affiliation but (1) that's not really ethical and (2) this fib could well catch up with you later. So, even if your long-term objective is to stimulate sales of, say, a new product, sublimate this objective for the purpose at hand.

**Engage in an effective conversation.** Remember, you're not interviewing a potentate; you want to have a substantive conversation with a colleague on a topic of mutual interest. Ask brief, somewhat vague, open-ended questions to elicit rich responses. Ask repeatedly for elaboration. Challenge with authority based upon what you already know (see "know your stuff" above) and what others have told you. Offer alternative views to what you hear, and listen for equivocation or firm resolve. Above all, don't constrain the dialog with a questionnaire-like script. While you set the macro-agenda, let the respondent set a few of his/her own micro-agendas. This approach will allow the real gems of ideas to emerge. By the way, you can have these conversations in several ways, but my favorite means is the telephone; it's free from most distractions, allows for a rich interplay, and permits note-taking without awkward interruptions. As for physicians, they are much easier to schedule for a phone call than a personal visit.

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