



Awesome Advisory Boards: An Insider's Insight

Advisory board meetings are often used to address perceived knowledge gaps and build consensus. They serve to capture and distil the combined wisdom of a group of subject area experts, accessing their experience to explore issues such as unmet needs or to discuss future therapeutic strategies. When managed appropriately advisory boards generate powerful outcomes.

Since 1998, the medical writing team at Niche Science & Technology Ltd. have organised and contributed to many successful medical advisory boards. Here we provide a guide to achieve the best outcomes.

Before you start

- Determine whether an advisory board meeting will deliver your objectives
- Reach out to expert contributors to discuss your requirements (and their willingness to get involved)
- Allow yourself sufficient time to plan and deliver a successful event
- Identify what you want as your final output

Prepare to succeed

- Clearly define the core topic to be considered
- Establish your aims, objectives and outcomes
- Build a balanced advisory board team that will work together constructively
- Plan out every aspect and describe clear project milestones
- Establish a solid briefing platform

Key Insights

Challenges to medical practice often appear unmanageable with current knowledge or understanding. Such challenges often span multiple and require coordinated efforts to achieve resolution. The complexity of such challenges means that they are often left unaddressed. Advisory boards present a mechanism for resolution. Healthcare professionals (HCPs) in particular find these meetings hugely rewarding, serving as a forum to get their voices heard. In terms of new therapeutic modalities, the approach offers the opportunity for clinicians to share their insights into how best they may be deployed.

Medical advisory boards are often employed to consider specific knowledge gaps and devise solutions or pathways to progress. The best outcomes are achieved only once a comprehensive understanding of the challenge has been established. A fundamental contributing factor is clear and relevant objectives. Attendees must also be conversant with how any discussions relate to the objectives and their clinical relevance.

The premise of advisory boards may seem relatively simple: get professionals together, encourage them to have a fruitful discussion and report on the outcomes. However, the delivery of a successful advisory board involves the careful coordination of multiple variables, each with the potential to negatively impact on your stated objectives.

Planning



"Coming together is beginning,

Meeting



keeping together is progress,

Report



working together is success."

Henry Ford

Planning

Advisory boards can be constructive and enjoyable team building exercises that generate insightful outputs and valuable strategic guidance. However, it would be naïve to think that such outcomes are achieved by simply sending out invitations and booking a room. It takes considerable planning and executional skill to create briefly an ecosystem that fosters creative thinking and makes the participants suitably comfortable to share their best thoughts with you.

Researcher

Briefing materials
Key questions
Agenda

Strategist

Chair selection
Attendee mix
Budget

Project Manager

Venue/event planning
Scheduling
Budget (again)

Politician

Leadership
Value proposition/belief
Attendee optimisation

Master of Ceremonies

Time management (with Chair)
Cheer Leader
Navigator

Occasional
Scribe

Adboards represent the archetypal three ring circus, where you, the circus master, must serve as researcher, strategist, project manager, politician, master of ceremonies and scribe. If you have resources in-house you should consider delegating any or all of these functions. Underestimating any of these roles or their contribution to success can lead to a lack of organization, communication and productivity during the meeting meeting, potentially resulting in wasted time, resources and missed opportunities.

Meeting In-person or Virtually?

The COVID-19 pandemic has led to a sea-change in the way group meetings are conducted. With the widespread and rapid adoption of virtual meeting technology, many advocates have become comfortable with the convenience and accessibility of virtual meetings, making them less eager to return to long, often stressful, journeys and time out of the office. Although virtual meetings offer benefits such as cost savings and better environmental sustainability, face-to-face meetings offer the opportunity for closer connections and fewer opportunities for miscommunication (Table 1). It is important to decide early in the planning process which type of meeting is most likely to achieve your desired outcomes.

Table 1: Advantages and Disadvantages of In-person and Virtual Advisory Meetings

In person	Virtual
Pros	Pros
<ul style="list-style-type: none"> • Social interaction fosters a more personable atmosphere and camaraderie among attendees • A more natural environment will make attendees comfortable and willing to contribute – an ideal scenario for collaborative brainstorming • Easier to capture the tone of discussion points and reflect this in meeting outputs 	<ul style="list-style-type: none"> • No restrictions in travel or venue offers flexibility for dates and times • Increased attendance and participation since attendees are not limited by travel or location • Less expensive to run • Easy and inexpensive to record for playback, note-taking or training purposes • Less of an opportunity for attendees to network (a possible attraction)
Cons	Cons
<ul style="list-style-type: none"> • Organisation is much more complex and planning must start earlier • Cost of travel and venue • Travel is a burden on the time of all attendees including key opinion leaders • Restrictions with venues/locations can be challenging when arranging a date/time 	<ul style="list-style-type: none"> • A less inclusive meeting environment can result in poorer engagement/communication • More susceptible to distractions, interruptions or technical challenges, e.g., internet connectivity issues • Limited social interaction can make it difficult to capture the tone of some contributions

Discussions relating to locations for in-person meetings need to take into account factors that could affect your attendees willingness to take part. For example, key opinion leaders (KOLs) with busy schedules may not be willing to travel long distances; hence, you may want to select a location close to a 'centre of excellence' or travel hub. Budget restrictions will also impact on the meeting format and where to hold the event. Hotel conference rooms tend to be the best locations as they are often purpose built for such events (see our Insider's Insight on Organising Professional Conferences for more detailed advice on venue selection [1]). Once a location has been selected, it is also important to create a seating plan that is most likely to encourage open discussion and avoid any unnecessary divisions among attendees (who may have opposing opinions).

Deciding to hold a virtual meeting can make meeting organisation much simpler, as none of the deliberations above apply. The most important consideration becomes the date and time, as well as certain logistical issues such how to organise breaks, or how best to encourage open discussion in the virtual setting.

Budget

Clearly, whether you decide to conduct a face-to-face or virtual meeting will considerably impact on meeting costs. The bad old days of attracting attendees by conducting meetings at holiday resorts and exotic locations are over. Regulations require a more pragmatic and reasoned approach focused on recruiting the most effective mix of experience and expertise of practicing HCPs and KOLs. Establish a budget at the outset, and be prepared for costs to increase. Aside from deciding on a location, other factors that impact the budget include the number of attendees, inclusion of a professional medical writer, and the type and scope of your outputs.

Setting the Date (and Time)

Set a provisional date early on during the planning stage; give yourself plenty of time as there will be a lot to do. A key point to remember is to make sure there are no competing conferences occurring on the date you want to hold your meeting, or clashes with any seasonal or religious holidays.

You may want to hold off agreeing the date until everyone has confirmed their availability, aim to extend invitations 2–3 months prior to the event [1]. Leave enough time for the attendees to receive, read and digest the materials in the briefing package.

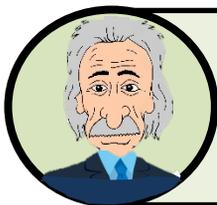
Pre-meeting activities:

- Finalise attendees list/Chair
- Decide on location/ send invites
- Set the meeting agenda
- Finalise meeting objectives
- Prepare briefing materials
- Establish nature of the meeting deliverables

Be clear about your objectives and what you want to get out of the meeting

Who to Invite?

Your advisory board attendees are critical to its success. Leaders are invaluable, but it is just as important to get the balance among participants correct. Aim for 8–10 attendees, that includes and representation from the organising team. This number provides the most harmonious balance and will foster open discussion to provide well-informed viewpoints. Key attendees include the Chair, a medical writer, and potential 'facilitators'. The Chair is key in achieving your objectives and selecting the appropriate person is a crucial decision – see our Insider's Insight into KOL Identification and Profiling for more details on selecting the appropriate individuals for an advisory board [2].



Chair

- Good rapport with others
- Time management skills
- Recognised scientific judgement
- Established communication skills
- Respect for all advisory board attendees



Therapy experts

- Doctors
- Key opinion leaders
- Healthcare professionals
- Practitioners
- Government/medical affairs



Specialists

- Statisticians
- Biomedical scientists
- Bioethicists
- Patients/patient advocates
- Health economists



Specialists

- Medical writer
- Sound/video engineer

Aim to achieve a wide diversity: regional, religion, ethnicity, gender, etc.

Good chairs will follow the agenda, manage the flow of discussions and ensure that the meeting objectives are met. In leading the meeting, they should ensure that discussions remain relevant to the knowledge gap and that everyone is able to voice their opinion. A medical writer facilitates the delivery of quality pre-meeting materials, they can also take detailed meeting minutes, and deliver post-meeting outputs. Finally, you may wish to include facilitators (field experts with a reputation for engaging in lively and creative discussions) to help cover specialised topics.

Compliance

Ensure that your meeting complies with relevant regulations. Pharmaceutical companies must adhere to the International Federation of Pharmaceutical Manufacturers and Associations (IFPMA) Code of Practice, 2019 [3], describing conduct of research or interacting with the scientific community. There are also national codes of practice in the UK (Association of the British Pharmaceutical Industry) [4], the US (Pharmaceutical Research and Manufacturers of America) [5], Canada (Research-based Pharmaceutical Companies) [6] and Australia (Medicines Australia) [7].

When conducting a face-to-face meeting, spend time researching local culture, customs and behaviours including: how people greet each other, body language and gestures, dress codes, and the giving and receiving of business cards and/or gifts. Seek advice from contacts who have visited the region before and have personal experience. When meeting people, follow their lead in greetings and exchanging business cards.



Setting the Agenda

The agenda should seek to navigate the advisory board's objectives. Good agendas dictate a meeting's pace and will impact on its success. Programmes benefit by alternating between discussions and presentations interspersed with workshops and other exercises. The format will depend on the nature of the challenge, as well as the objectives of the advisory board, and varying the activities can greatly improve the interaction of the attendees and their creativity. Regular short breaks help the group remain focused and participants stay engaged in the discussion.

The meeting should be allowed to flow smoothly; as the attendees are experts, it is expected that they will likely appreciate the opportunity to exchange thoughts with their peers. However, while the agenda is a fundamental aspect of the advisory board, the discussions should not feel constrained. The Chair should not be afraid to ask questions or probe answers that are not directly related to the agenda. The extent to which discussions progress should fall to the Chair's judgement. The final 'outputs' are generally improved when the Chair occasionally pauses the discussions and summarises the proceedings of the meeting, highlighting important points made so far and providing clarification for whoever is taking notes.

Briefing Materials

Attendees require appropriate briefing that, in addition to providing information on the agenda and objectives, should include a summary of background information and pre-reading list. Prepare and distribute your briefing package plenty of time before the meeting, giving attendees sufficient time to understand the meeting objectives. Presentations can facilitate discussions and complement the agenda. Including a pre-meeting questionnaire can also focus discussions. Background reading materials and meeting handouts can be useful resources to provide further context to the agenda. Materials for pre-reading, and presentations will likely require compliance approvals. A general rule is that 60% to 75% of the meeting should focus on discussion, but local/company regulations may vary.

Recording Success

The general goal of a medical advisory board meeting is to **capture** insights on possible research opportunities, including guidance on the clinical development and trial protocols, as well as unmet healthcare needs that might drive future clinical strategies. As part of the narrative you need to record both the points of consensus **and** disagreement. How the information will be captured and shared needs to be defined during the planning stage, so that all attendees are aware of your intentions, and you should also share your delivery timeframe.

You should be clear as to who the output will be shared with - such as peers and other healthcare stakeholders, particularly any insights that will achieve better patient outcomes. The style and format of the outputs should be established in detail (see the Post-meeting section for further details). The variable benefits associated with alternative output formats are described in **Table 2**.

Meeting Conduct

First impressions are critical as they can determine how well attendees may interact. The Chair and/or host should open the meeting with engaging introductions and a clear description of the objectives. Following that, self-introductions tend to work well and can encourage a more informal and open atmosphere.

Capturing the proceedings is the most important task. This includes the tone of the discussions with can provide an added dimension to the final outputs by providing insight into different positions of the attendees. If there is no formal note take you should identify someone to capture the minutes (not one of the participants).

All topics should be captured equally in the meeting minutes. The different 'types' of dialogue require varying consideration and emphasis in the notes. Prompt your attendees to emphasise key issues by using phrases like 'in particular', 'especially', 'mainly' or 'importantly'. Disagreement highlights points of interest that need to be considered in detail, including points or issues where it is not possible to achieve a consensus, or are identified as being unobtainable. Conversely, any points where the group is in immediate agreement should be similarly captured, along with any details behind the consensus.

It can be particularly difficult for the minute-taker to follow the discussion if a lot of specialised language is being used. Reading all the briefing materials beforehand, paying attention to common abbreviations or specialised phrases can help. The minute-taker should aim not disturb the flow of the discussions but should ask for clarification of key points.

Post-meeting Activities

Hold a team debrief shortly after the meeting. Focus on summarising the key discussion points, presenting them in a pre-planned and meaningful format. The outputs should capture the gist of the discussions and generally follow the structure of the meeting agenda.

Meeting Minutes

The minutes should follow the meeting agenda, covering the main topics and objectives as well as any additional agreed outcomes. It is essential to confirm that the meeting objectives were met and define how the learnings and actions from the advisory board fit with strategic plans. A draft of the minutes should be sent to the Chair (and possibly the attendees) no more than 2–3 days after the meeting for their comment. A final draft should be prepared for the Chair to approve and sent to the wider attendee group. The minutes can serve as a foundation for any subsequent outputs.

Reporting

Meeting reports should be a comprehensive review of the activities of the advisory board and the wider knowledge gap. Discussion topics are an essential resource when producing a report (and any other outputs) and it is essential to utilise their expertise. It may be that the results of the meeting are worthy of publication in the scientific literature and should therefore be prepared with this in mind – particularly if the meeting followed a consensus format (see our Insider's Insight on Coming to a consensus for more details on the significance of reaching a consensus in a scientific field [8]). The author of the report may consider including supporting data or opinion from the scientific literature. Where the meeting minutes have included the key questions and discussions, the report can group the results in a meaningful, continuous text.

Transcription Software

If you are planning to record the meeting electronically remember to ask for all participants to provide their written consent. Recording a meeting allows the minute-taker to focus on the proceedings and understand the nuances of the discussions but technology is never 100% reliable. Remember that poor acoustics can make recordings unusable.

Generating a transcript can be laborious, even when you have a recording of the meeting. To speed up the process, software is available that can convert audio files (most often in 'mp3' format) into a written transcript.

A useful tip is to stop and restart the recording after major topics of discussion, making the audio files more manageable and easier to navigate.

Remember to closely review any electronic transcription as the software is rarely 100% accurate. Popular transcription software include: Otter.ai, Rev.com and Transcribe.

What to avoid... “a transcript the size and weight of a concrete slab full of rambling conversations [9].”

Table 2: Strengths and Weakness of Meeting Output Vehicles

Report format	Description	Strengths	Weaknesses
Meeting Transcript	<ul style="list-style-type: none"> A verbatim transcript of the advisory board meeting 	<ul style="list-style-type: none"> Includes everything discussed during the meeting 	<ul style="list-style-type: none"> Long and difficult to manage and navigate May include irrelevant dialogue
Meeting minutes	<ul style="list-style-type: none"> A balanced summary of the key points discussed 	<ul style="list-style-type: none"> A standard deliverable Concise summary of all the discussion points 	<ul style="list-style-type: none"> Does not include the surrounding literature of the knowledge gap
Executive summary	<ul style="list-style-type: none"> Summary focusing only on the results to each objective 	<ul style="list-style-type: none"> Includes the significant discussion points 	<ul style="list-style-type: none"> A subjective statement of the discussions
Formal Report	<ul style="list-style-type: none"> A review of the advisory board meeting and knowledge gap 	<ul style="list-style-type: none"> Includes all relevant information Includes supporting data from the literature Can become a scientific manuscript 	<ul style="list-style-type: none"> Takes investment of time and resources to create
Slide Deck	<ul style="list-style-type: none"> Graphical/visual representations can easily summarise key points and may include supporting data 	<ul style="list-style-type: none"> Can present an easily digestible summary of the meeting findings 	<ul style="list-style-type: none"> Often less detailed and informal

An Interview With Our Managing Director



What makes for a good advisory board meeting?



A clear agenda and an effective Chair are both fundamental components when planning a meeting. Well defined objectives empower your Chair to steer the attendees towards meaningful discussions, focus on the nature of the underlying problem and address the areas where knowledge is lacking.



What are some challenges you have faced while conducting an advisory board meeting?



I always take expansive notes as I do not trust technology – audio recorders often come with issues. At one meeting we did there was a busy conference in the adjoining room. When we reviewed the recordings they were almost useless despite us having used professional recording devices. Your meeting may be a once in a lifetime event and one of the insights may relieve the suffering of thousands – never take any chances.



What is the optimal number of attendees at an advisory board?



In my experience, advisory boards work best with 6–10 attendees. This gives everyone the opportunity to share their opinion within a reasonable meeting timeframe. It also provides an optimal balance between several viewpoints from experts and keeps the discussion contained without an overload of opinions. Longer meetings introduce the potential bigger groups, but it also tends to increase the number of ‘passengers’ – people who feel they cannot contribute.

Success Checklist

Location Aim for an accessible location: an airport hotel is good, a hotel at a hub airport is better.

Timing: Weekends can be unpopular - Wednesdays to Fridays are preferred.

Notice: Give at least 10 weeks .

Venue: Experts tend to prefer stand-alone meetings rather than juggling calendars at a packed congress.

Compliance: Work within your own country’s special rules and regs.

Agenda and Objectives: Prepare a plan and stick to it.

Pre- and post-meeting materials: The best outcomes are achieved when participants are prepared. Delivering a thorough report after the meeting ensures that the participants feel that their contribution was valuable.

And finally...

Remember to thank all the attendees for their contribution and remember to keep communication channels with the attendees open. They may have updates in their roles as professionals or post meeting insights that could impact on the advisory board objectives or outputs. It is also likely that they will be eager hear of any developments arising from the meeting.

Advisory boards should not be viewed as a stand-alone event, nor will they necessarily address all aspects of a knowledge gap. However, they can serve as a useful initiative that form part of the wider research efforts. They offer an opportune way to initiate discussion within a scientific field, and this momentum can have a hugely positive impact. Consider how the advisory board may contribute to an ongoing area of research and how to publish the discussion narrative and consensus in a scientific journal. If you publish the proceedings, you may not only want your attendees to be report authors but also be willing advocates actively involved in dissemination of its key messages.

Always conduct a post-mortem of your advisory board process to learn which aspects of the event worked well and what could be improved.

References

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Next Steps

I hope you found this guide useful. We created this Insider's Insight into advisory board meetings to provide some key tips and share a few helpful learnings that we have acquired over the years.

If you are interested, we would be happy to share more of our experience with you and discuss how you can get the most out of an advisory board meeting. Please contact me at the email address below if you have any questions or need support.

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