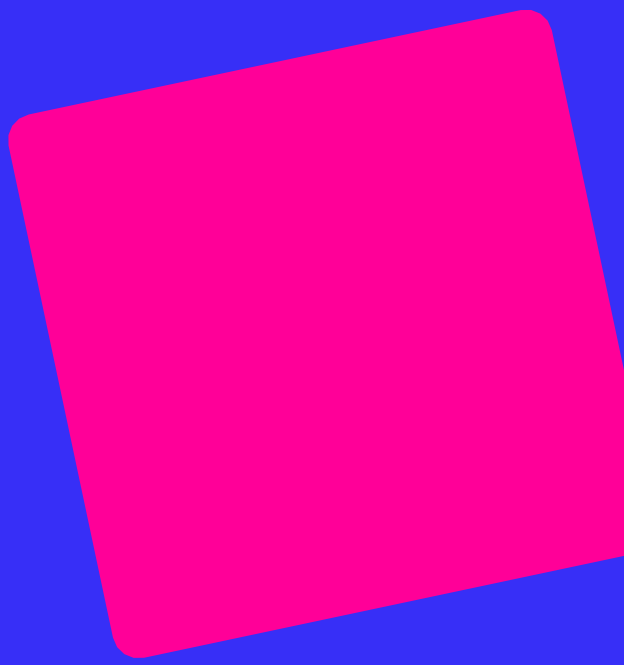
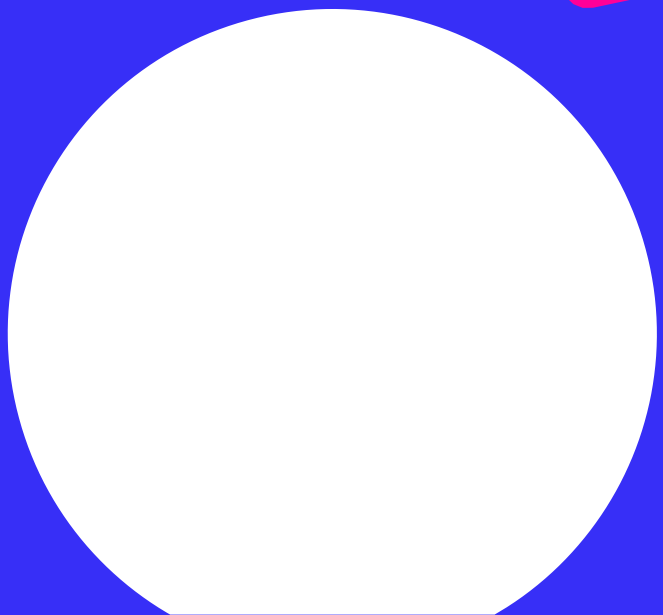
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Skills Framework

2026 Update







BHBIA Skills Framework

About the Skills Framework

The BHBIA Skills Framework maps the roles, expertise and experience across healthcare business insights, so you can see where you are, where you could go and what it takes to get there.

Developed with senior industry leaders, it also guides how we plan our training, so what we teach follows the work you do.

The Framework

Healthcare business insights cover far more than research and analytics. The framework sorts the work into **eight specialist domains**.

- Fieldwork
- Qualitative Market Research
- Quantitative Market Research
- Customer Analysis
- Commercial Excellence
- Real-World Insights & Evidence
- Data Working
- Business Skills

Skills and Experience

Each domain sets out the specialist skills, tools and techniques you may need, and shows how they develop across three career stages: **Emerging Professional, Established Professional and Leading Professional.**

Read down each column to see what's expected at one stage, or across each row to follow a skill through your career. Business Skills are described through good practice indicators, and every domain builds on the core compliance knowledge covered by our Legal and Ethical Guidelines training and certification.

Supporting You and Your Organisation

Whatever your role, the Skills Framework helps you make better development decisions:

- **Deepen your expertise.** Plan how to build depth in a domain over time.
- **Widen your range.** See what other domains ask of you, and prepare for a move into a new role or discipline.
- **Build your team.** Spot the skills your team needs, map clear career pathways and choose the development support to get there.

Contents
Domains

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Fieldwork	RECRUITMENT | INTERVIEWING | GROUP DISCUSSION MANAGEMENT | PANEL MANAGEMENT
Qualitative Market Research	METHODOLOGY | STUDY DESIGN | ANALYSIS, SYNTHESIS & INTERPRETATION
Quantitative Market Research	METHODOLOGY | STUDY DESIGN | ANALYSIS, SYNTHESIS & INTERPRETATION
Customer Analysis	CRM | SEGMENTATION & TARGETING | PERSONAS | OMNICHANNEL
Commercial Excellence	OPERATIONS | INCENTIVES | FORECASTING | TERRITORY MANAGEMENT | MARKETING EXCELLENCE
Real-World Evidence & Insights	REAL-WORLD INSIGHTS | REAL-WORLD EVIDENCE | ARTIFICAL INTELLIGENCE
Data Working	MASTER DATA MANAGEMENT | GOVERNANCE & PRIVACY | DATABASE ADMINISTRATION | DATA VISUALISATION
Business Skills	CRITICAL THINKING| ANALYTICAL THINKING | STRATEGIC THINKING | COMMUNICATION & STORYTELLING | BUSINESS ACUMEN | PROJECT MANAGEMENT | COLLABORATIVE WORKING

Fieldwork

Fieldwork involves the logistical organisation and conduct of market research surveys, interviews and meetings. Every primary research project has an element of fieldwork, from recruiting panels of subjects to conducting focus group meetings. Some research organisations carry out their own fieldwork but there are other agencies, working as contractors, that specialise in recruiting respondents or carrying out fieldwork.

Emerging Professional	Established Professional	Leading Professional
Recruitment: recruitment involves ensuring that the research is carried out on a population that meets the needs of the study, both in terms of quantity and mix of subjects. In some cases, recruiters may be responsible for a specific geographic territory. Some organisations maintain a large panel of subjects that take part in regular surveys.		
You may be working with a pre-defined list of subjects to fit a specific brief from a client or research department. You may be involved in handling incentive arrangements. At this level, you are more likely to have a national or sub-national level remit.	You may be responsible for maintaining domestic & international lists of potential subjects from which research populations can be drawn. You work with research departments to ensure that the recruitment brief meets the needs of the research programme in the most efficient way and manage sensitive negotiations with client organisations around quotas & incentives.	As a leading fieldwork practitioner, you will be in overall charge of maintaining an appropriately broad base of potential subjects. You will generally be the main point of contact for client companies or research managers.
Interviewing: interviews may be conducted over the telephone, face to face or, increasingly, online. They may be highly structured or completely free ranging or anything in between. In all cases, it is important that the interview is carried out as objectively as possible, avoiding influence from the interviewer's own views and experience.		
You usually work from a structured interview guide with relatively little scope to deviate from pre-defined script. Subjects' responses will generally be codified, or recorded on a scale of some sort, with few opportunities to give free-text responses.	You are likely to be conducting unstructured discussions, following a loosely defined guide. You need to be able to encourage subjects to express their views openly and objectively, and to capture these in their interview notes.	You work closely with clients in research organisations to help design discussion guides for both structured and free-ranging interviews.
Group Discussion management: Using group discussions to conduct research can not only be efficient in terms of cost and time but can generate new insights as individuals respond to others in the group. Moderating skills are needed to avoid 'groupthink' and to ensure that each participant's views are recorded.		
You are more likely to be involved in the logistics of arranging the meeting, rather than running any discussion (unless under supervision).	You have the skills needed to moderate group discussions, as well as working with venue managers to arrange the logistics of the meeting.	At this level you will work with clients to interpret the research brief and produce the discussion guide for the meeting.
Panel management: Managing panels of respondents is often the most efficient method when large study populations are required, usually through an online survey. Managing these panels involves, hosting, recruiting and maintaining a database of perhaps thousands of individuals.		
You may be responsible for recruiting, maintaining and updating the panel database. This involves working with lists to validate panelists and ensure information is accurate and up to date.	You will liaise with client organisations to manage specific projects to make sure that the study population has the correct characteristics. You will also manage the incentives for panel members.	As a leader, you will develop and expand the use of panels in terms of geography, specialisms and other Characteristics. You will seek to introduce innovative applications for panel work.

Qualitative Market Research

Qualitative Market Research projects are aimed at gaining a general understanding of the marketplace, based on relatively small sample sizes. The results of qualitative research are not statistically representative, the aim being to uncover general attitudes and behaviours, and to understand how the motivations behind these can be affected. Typically, qualitative research uses in-depth interviews group discussions, observational techniques and desk research, and reports are narrative in nature.

Emerging Professional	Established Professional	Leading Professional
Methodology: primary methodologies include focus groups, interviews, workshops and observational/ethnographic studies. These may be carried out face to face or virtually. Secondary research may involve literature reviews and social media listening. Emerging technologies offer additional opportunities for innovation.		
You will generally work on projects where the methodology is quite structured (surveys and discussion guides). You may be responsible for the execution of ready-made projects, usually under supervision.	At this level, you will work with a greater degree of autonomy, carrying out open ended interviews and managing focus groups. You will be comfortable with all methodologies, including using projective and enabling techniques in the design and operation of a study protocol.	Leaders are responsible for organising the flow of work and managing a team of researchers. They may introduce new methodologies to the organisation and, in the case of agencies, will be involved with business development.
Study design: the research question operationalises the business question. This relates to the way specific methodologies are selected and configured to address the key research question. It involves making sure that the study population is appropriate and of the optimum size, whilst taking into account cost considerations and ethics.		
At this level, you may be involved in writing study protocols and discussion guides in response to a detailed brief.	Having decided on how the research question is to be framed, you will decide on the most suitable method and characterise the research population. You will be responsible for producing a plan detailing the content of the research instrument (discussion guide), including guidance on using projective or enabling techniques.	You work with the research commissioning team (internal or external client) to help them frame the research question in a way that addresses the key business issue and can be tested in a suitable population. You may not write the detailed study protocol, but you manage the operationalisation process.
Analysis, Synthesis & Interpretation: analysis involves identifying relevant pieces of information and distinguishing findings from insights (novel information which is actionable). In Qualitative research the results are presented in a narrative form, with little, if any numerical or statistical analysis. Reporting the results, therefore involves reviewing individual responses (analysis), bringing them together (synthesis), and coming to some conclusions (interpretation) that relate to the research question and gives direction to the business in the form of actionable insights.		
Where the results are highly structured (for example in response to a semi-structured interview), you may be responsible for producing sections of the final presentation, under supervision.	You will review content of open-ended discussions and are able to distil these into a set of insights that can be presented to the research commissioners. You're able to turn research findings into a structured model, possibly using advanced qualitative analytics frameworks, such as behavioural economics.	Acting as a consultant/influencer, you are responsible for presentation of not only the plain results of the research, but you also understand how they relate to the strategic aims of the commissioning organisation. You turn research findings into actionable insights and seek to effectively introduce innovative analytical models and frameworks.

Quantitative Market Research

Quantitative Market Research is used to answer business questions needing numerical answers, to a greater or lesser degree of precision. It is often used in forecasting the potential for new products, segmentation and pricing strategies. Quant studies use relatively large samples of respondents that should be statistically representative of the population to which the results will be applied (e.g., specialist clinicians).

Emerging Professional	Established Professional	Leading Professional
Methodology: quantitative research generally is conducted using a survey or questionnaire of some kind. This can be administered online, by telephone of as a face-to-face or virtual meeting. Responses are usually pre-coded, with some room for open-ended answers.		
At this level, you may be involved in the administration of surveys or conducting telephone interviews. You may check links, manipulate raw data into tables and run descriptive statistics.	As an established professional , you will be responsible for selecting the most appropriate methodology and analytical techniques (conjoint, latent class). You will be involved in formulating the survey and will decide the most appropriate delivery route (online, telephone). You will have to respond to queries and may have to solve technical problems.	Working with the client (internal or external), as a leader you will determine how the research question or hypothesis should be framed, and whether any sub-group analysis may be required. You will be responsible for ensuring that the study design is consistently related to the client's business questions.
Study design: the design of quantitative research studies is primarily concerned with the size and profile of the research population. This in turn depends on how precise the answer needs to be. It is important therefore to understand the concept of statistical power so that the study can be scaled optimally.		
You may be involved in writing study protocols in response to a detailed brief. You may be required to design particular survey items, generally under supervision.	Having decided on how the research question is to be framed, you will be able to determine the size and characteristics of the study population, taking into account any subgroup analysis that may be required. You will be responsible for the detailed design of the survey or study instrument. You will specify the data structures needed to optimise the analysis process.	Translating a business question (e.g. forecasting sales of a new product) into a research instrument or survey is rarely straightforward. You will work with the team commissioning the research (internal or external client) to help them frame the research question in a way that can be tested in a suitable population.
Analysis, Synthesis & Interpretation: quantitative research results are generally presented in the form of graphs, tables, statistical models and infographics, and may include statistical parameters (significance values, confidence intervals).		
Where the results are relatively straightforward (e.g. only descriptive statistics) you may be responsible for producing the final presentation.	You may be required to produce complex analysis - either directly or through a third-party expert, for example when statistical testing (confidence limits, correlations etc) is involved. You will need to use the most appropriate visualisations to clearly present the research, so that clients can see how they relate to their business issues.	You will present not only the plain results of the research, but you will also be able to guide the client in the interpretation of the insights given, relating these to their business issue and recommending courses of action that help them achieve their strategic objectives.

Customer Analysis

Customer analysis involves collecting, analysing and presenting information about the organisation's external stakeholders, particularly health care professionals. Details of contacts and communication between the company and its customers are managed in a structured way, usually in a Customer Relationship Management (CRM) system, so that the customer analytics team can provide insights to support critical business decision making processes.

Emerging Professional	Established Professional	Leading Professional
CRM: Customer Relationship Management is a process in which a business or other organisation administers its interactions with customers, typically using data analysis to study large amounts of information.		
At this level, you may be responsible for ensuring that the CRM system is updated, and the information is accurate and up to date. You will mostly work under supervision, with limited autonomy.	As an established professional , you are likely to be involved in configuring reports on the CRM system and creating dashboards to deliver meaningful insights to the organisation, working closely with brand teams and other commercial colleagues.	The leading professional deals with external data suppliers and works closely with senior management to ensure that the CRM system is fit for the purpose of decision support. At this level, you will maintain a watch on developments and bring in innovative technologies in a way that helps your organisation meet its strategic goals.
Segmentation & Targeting: segmentation is a strategic approach that enables the organisation to classify HCPs and organisations based on specific characteristics, such as medical specialty and hospital affiliation. Tactically, segmentation is realised in a target list of customers, based on their potential to impact strategic objectives.		
You will support the organisation's segmentation model, incorporating tactical changes to targeting. You will maintain an accurate target list of customers in response to requests from managers, and under supervision. You are likely to be responsible for running routine analyses on the CRM system.	At a more senior level, you will be responsible for implementing changes to the segmentation model, monitoring its effectiveness, and ensuring that target lists are effectively maintained.	As a leader, you will be advising the organisation on how to optimise its segmentation strategy and tactics. You will need to be in touch with customers and their environment and anticipate changes that may impact the segmentation approach.
Personas: Personas are fictional profiles that represent groups of similar people in a target audience. They enable the organisation to reach people on a personal level, delivering the right messages, at the right time.		
The characteristics that make up a persona are typically held in some form of template or typing tool. You will be responsible for compiling and maintaining these templates in response to inputs from market research and other sources.	At this level you will work with your organisation's commercial teams and perhaps with market research agencies to identify the key characteristics that make up the personas and set the parameters for the persona templates.	When it comes to personas, leaders hold a strategic brief. You are responsible for the design and implementation of the personas template, and making sure that it remains aligned with organisation's goals.
Omnichannel: Omnichannel analysis provides an integrated view of multiple data sources to better understand customer preferences and behaviour and anticipate future requirements. Customer 360 uses an omnichannel approach to provide a complete view of the customer journey.		
Omnichannel analytics typically involves managing a large and diverse group of data sources and you may be responsible for maintaining these in a way that makes them usable by other analysts and the organisation as a whole.	At a more senior level you will be responsible for monitoring and working with omnichannel data to give insights to the organisation. You will most likely manage operational colleagues to ensure the data is maintained appropriately.	As a leader, you will drive omnichannel development through the analytics team and any external stakeholder agencies to achieve the customer 360 view. You will look to introduce innovative ways of working with and linking omnichannel data to support strategic objectives.

Commercial Excellence

Commercial excellence is concerned with forecasting and ensuring that all the organisation's promotional resources are deployed optimally to meet the objectives of the business. The salesforce is usually the largest and most important element of this, and so much of the work involves configuring territories, monitoring activity and setting targets.

Emerging Professional	Established Professional	Leading Professional
Operations: operations relates to the maintenance of the salesforce structure, and the logistical elements of managing and monitoring activity (calls, meeting etc.) Generally, operations work closely with customer analysts and are often involved with the CRM system.		
Working under supervision, with relatively little autonomy you will most likely be responsible for collating data, updating reports and managing routine communications with the salesforce managers, representatives or KAMs.	As an established professional , you will work closely with brand teams and salesforce managers to help translate the needs of the business into actionable plans.	You will usually work across several brand and sales teams to ensure that the entire salesforce operation is working optimally. You will take a longer-term strategic view of how this resource is configured and may be responsible for introducing new technological solutions and ways of working to the organisation.
Territory Management: Working with the brand teams in either their own or client organisations, salesforce analysts ensure that sales territories are optimally set up in terms of the number and type of customers, and also aligned with relevant NHS management structures.		
You may be responsible for maintaining up-to-date territory lists, and co-ordinating communications regarding changes with the salesforce.	Salesforce remodelling may be required in response to changes in health service structure or organisation priorities. You may be responsible for the implementation of these changes, either directly or by managing other analysts.	At the highest level, you will have a leading role in developing and evaluating strategic options for salesforce deployment.
Incentives: typically, managing incentive programmes involves setting sales and/or activity targets for territories and monitoring performance against these targets. It is a critical function, which needs to be transparently fair and equitable, if it is to be a real driver of success.		
At this level, you may be responsible for maintaining and updating salesforce performance reports. This might involve collating data from various sources (salesforce activity, sales etc) and working with the CRM system.	You may be involved in setting the key parameters for incentive programmes and ensuring that data systems are in place to support these. You may manage a group of analysts to achieve this in practice.	You may be responsible for the overall management of the incentive programme. You will be involved in major changes to targets, ensuring these are aligned to your organisation's strategic objectives.
Forecasting: Sales forecasting is a critical operation for any business. In the healthcare sector, forecasts may be based on historical sales performance, epidemiology or a combination of both. Predicting the impact of technological and other changes is an important part of producing an accurate forecast and may be part of global consolidating forecast.		
You may work with historical data to identify trends and produce forecasts by extrapolation, possibly using specialist software. You may be responsible for producing consolidated forecasts according to a defined process. Populating model templates.	You may be responsible for the design of patient flow and other complex models that capture assumptions about the drivers of sales. You may also need to reconcile forecasts from different sources, for example ex-factory and in-market sales, taking account of supply chain factors. You will need to challenge/defend/explain your models to stakeholders.	You take a strategic view, and are likely to be involved in longer range forecasting, scenario planning and using analogues to forecast the launch performance of new products. You will have a critical input into the design of forecast models.
Marketing Excellence: Brand Managers rely on accurate information to help them understand the factors driving sales performance. This involves establishing a set of key performance indicators (KPIs) which are regularly monitored by the analytics team.		
At this level, you may be required to maintain a set of reports including KPIs.	You will be involved in setting KPIs and managing the reporting process.	As a leader, you will work with senior managers to identify the most relevant factors to include in KPI reporting.

Real-World Evidence & Insights

Evidence and insights generated from the analysis of real-world data is covered by this domain. RWE may come from traditional sources such as publications, clinical trials, HES, or from dynamic digital and social media sources. RWE analysts can use this information to reveal details of treatment pathways, disease burden, behaviours and attitudes, Key Opinion Leaders & Digital Opinion Leaders, and other factors that can help gain deep insights into the way in which key markets operate.

Emerging Professional	Established Professional	Leading Professional
Real-World Insights: RWI can be derived from digitally generated, unstructured data as a source - from websites and forums through to social media applications. Professionals in this space are skilled at using specific tools and techniques to gather this data, and structure it in a way that enables methodical analysis and interpretation. Uses can range from understanding the reasons patients make certain treatment decisions through to identifying key, online opinion leaders (often known as digital opinion leaders).		
Emerging professionals in this space will typically be social media analysts, writing and setting up search queries to generate outputs reports as part of a project team. They will understand how to classify and code unstructured numeric, and text based raw data.	Your involvement here is largely consultative, helping to guide and shape the analysis plan based on the insights the project aims to uncover. You will have an in-depth understanding of how to use and apply social media listening as an insights methodology and can do this in line with Data Protection legal and ethical requirements. You will have strong critical thinking and storytelling skills to deliver back compelling "so what" insights.	Leading professionals are typically horizon scanning for new technologies or approaches to digital insight generation. You will be responsible for new business generation, spotting opportunities to innovate methodologies and challenging processes to evolve best practice. You will always be assessing current and future practices against legal and ethical Data Protection requirements and act as a leading voice in your organisation.
Real-World Evidence: RWE data sources such as NHS England (formerly NHS Digital) reports, disease registries, commercial providers and digital sources can provide valuable insights for healthcare companies. However, they are generally complex and often subject to restrictions in terms of their scope and purpose. Where they contain information relating to individuals, they are usually pseudonymised. Working with raw datasets is a specialised function and often carried out by agencies (sometimes called "infomediaries") on behalf of clients.		
As an emerging professional , you may be responsible for maintaining reference tables for national data sets. These may include lists of NHS organisations and clinical coding sets, such as ICD and OPCS. These tables may be used for detailed analyses if your organisation has access to raw data, or to produce reports based on aggregated data.	At this level, you may be involved in directly interrogating raw data. If your organisation does not hold raw data itself, then you may be responsible for briefing third parties to ensure that the analysis meets the needs of your business.	The leading analyst may be involved in liaising with NHS England or other third-party agencies to gain access to part, or all, of a real-world dataset. At this level, you will also be responsible for ensuring that data is only used for specific approved purposes and that any data sharing agreements are fully complied with.
Artificial Intelligence: Within the broad field of Data Science, the term "artificial intelligence" is used to cover set of practices aimed at enabling computers to 'learn' in an apparently intelligent way. Machine learning is a subset of AI that involves applying specific algorithms to (usually very large) sets of data applications such as predictive analytics.		
Initially under supervision, you will work with AI/machine learning programmes to generate reports. You may also be involved in some aspects of database administration (updating, data cleansing etc).	As an Established Professional , you may be expected to take a brief from a client and translate it into algorithms that run on AI systems.	This is a rapidly evolving field, and as a leader, you will work with AI systems in a more exploratory way, finding innovative ways to apply them. In an agency setting, you will be responsible for developing new business opportunities from these ideas.

Data Working

Data working refers to the management of transaction level data. This involves designing and maintaining appropriate database structures, ensuring that these are available to other analysts to work with. This includes maintaining appropriate authorisation and access controls.

Emerging Professional	Established Professional	Leading Professional
Master Data Management: dataset management involves dealing with the many items of data that come into the organisation and making sure that these are processed correctly and linked geographically or by organisation where appropriate (avoiding duplication, efficient data structures). When new sources of data are brought in, they need to be linked to existing datasets.		
Working under supervision, you may be involved in running tests on database integrity and producing reports of performance. In response to requests, you may be required to programme database changes. You will manage and maintain updates to geo or org links.	You are responsible for implementing the dataset management programme, either directly or through a team of analysts. You will translate user requests into database operations. You are likely to advise on implementation of new geo or org links and risk assess and solve any impacts to datasets.	As a leading professional , you will be responsible for the overall design and structure of the main database, and the general design of data structures within it. You will horizon scan for changes in healthcare systems that could change geo or org links and will plan for these eventualities within your organisation.
Governance and Privacy: this involves ensuring that the organisation is compliant with current regulations concerning personal data, and has strategies in place to deal with potential data breaches etc. You will be aware of the purposes for which data is held, which are likely to be set by a specific licence condition.		
You will be expected to understand GDPR requirements and operate within the current regulatory framework. As part of the organisation's policy, they may be required to process requests for information relating to these regulations.	As well as operating within the regulatory framework, you may be responsible for ensuring that governance and privacy policies are followed in the wider organisation.	The leading analyst has a key role in the development and implementation of the organisation's policies relating to data governance and privacy and ensure that these are kept up to date and in line with changes to the regulatory environment.
Database Administration: data has a lifecycle, and database administration involves making sure that this operates effectively, from incorporating new data in a timely way and archiving or deleting data that is no longer needed. Database administration also includes managing access controls, so that every piece of data is only available to properly authorised users.		
You may be required to process routine administration tasks on the database, including change requests, under supervision.	You may be responsible for the implementation of database administration policies, for example maintaining the appropriate level of user access and optimising database performance.	You will be responsible for setting the overall administration policy and ensures that this is aligned to the organisation's goals.
Data Visualisation: data visualisation is the graphical representation of information and data. By using visual elements like charts, graphs and maps, data visualisation tools provide an accessible way to see and understand trends, outliers and patterns in data.		
Working to a design brief or specific request you can use existing available datasets, conduct an ETL process to generate the necessary metrics and then visualise these using a variety of impactful and appropriate methods. You may be responsible for the routine updating and provision of these visualisations to a wider set of colleagues or clients.	You will be involved in the insights design of the final outputs and can advise solutions or challenge suggestions from other teams. You can link final insights and metrics to the starting data infrastructure required to generate these and set up databases or work with responsible colleagues to support the outputs needed for analytics processes.	You will be responsible for the long-term data visualisation strategy, with an eye on technical infrastructure and design principles and tools needed to do this. You are seen as a necessary voice in the insights generation process and actively lead on data visualisation developments and decisions within your organisation or with clients.

Business Skills

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Critical Thinking

Is a systematic approach to decision making and problem solving. It involves identifying relevant information and using it to generate options or alternative scenarios that can be compared objectively. Although it involves thinking systematically, critical thinking can be highly creative, leading to novel and innovative solutions.

Good practice indicators include

- *Understanding sources of information strengths and weaknesses*
- *Identification of patterns in data and distinguishing these from 'data artefacts'*
- *Creative approach to problem solving, including the generation of alternative solutions*

Analytical Thinking

Is related to critical thinking but is more focused on assessing alternative solutions, rather than generating them. In many cases, analytical thinking requires the use of statistical techniques to identify the level of risk around a proposal or to assign confidence limits to a sales forecast, for example.

Good practice indicators include

- *Evaluating alternative solutions against objective criteria*
- *Identifying risks around projections.*
- *Using statistical tools*

Strategic Thinking

Provides the link between the organisation's mission, its goals and its activity. It drives key decisions, including how the organisation is structured, how it allocates its resources and how it positions itself competitively in the marketplace.

Good practice indicators include

- *Focusing on long term goals*
- *Monitoring the market for demographic, political and environmental changes*
- *Involvement in major investment decisions*

Communication & Storytelling

Is the ability to develop an engaging narrative that conveys the relevant information, considering the characteristics of the audience (who may have little understanding of (or interest in) technical details. Good communication also involves listening to the audience and constructively challenging where necessary.

Good practice indicators include

- *Delivering written or verbal communication in a logical and understandable way*
- *Listening and responding to audience feedback, questions and requests for clarity*
- *Effectively challenging, especially when this goes against traditional ways of working*

Business Acumen

Involves understanding basic business principles and ensuring that these are considered when choosing between alternative solutions and strategies. As BI professionals develop through their career, they are likely to be increasingly involved in financial decisions and negotiations, and so a good understanding of general financial management will be important.

Good practice indicators include

- *Understanding potential constraints and opportunities*
- *Negotiating cost-effective solutions with external partners*
- *Showing responsible budget management*

Project Management

Skills ensure that business goals are achieved on time and within budget. Effective project managers understand the interdependence of tasks with a programme of work. They can anticipate problems and identify solutions. They need to be able to attend to details, while also maintaining a 'big picture' overview of the state of the project.

Good practice indicators include

- *Setting time points and budgetary milestones for a project and reporting performance against these*
- *Communication with internal and external project stakeholders*
- *Allocation of appropriate resources to workflow items*

Collaborative Working

Is working as part of a wider team either in person, or remotely in individual locations. Effective collaboration with internal colleagues and often with external client/agency teams is important for virtually all projects. This means working with key stakeholders to maintain focus on the work in hand to ensure goals are achieved in a timely manner.

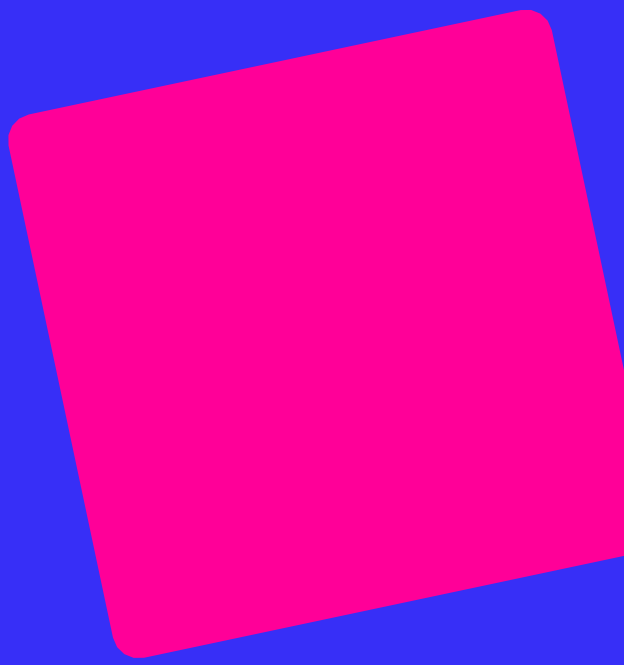
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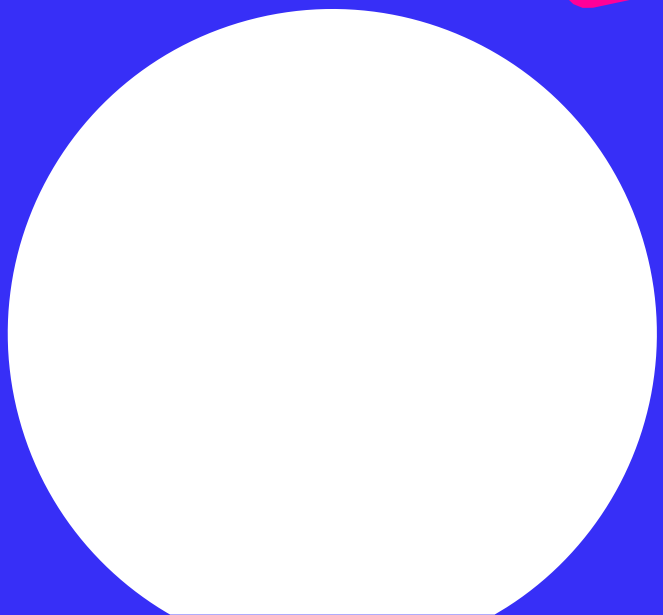
- *Ensuring workflow changes are understood by all*
- *Providing opportunities for stakeholders to make suggestions or voice concerns*
- *Negotiating sensitively with stakeholders to resolve conflicts or solve problems*

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Skills Framework

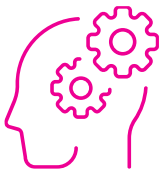






BHBIA
Skills Framework

The BHBIA has identified seven business domains, and while we appreciate that many roles do not fall neatly into any single one of these, we believe they cover the full range of members' business roles and responsibilities.



For each domain we have identified **specialist skills** that members may need to be effective in their roles. These include any distinct areas of knowledge or expertise that may be required.



Any specific **software**, **tools or techniques** members may need to be effective in their role have also been highlighted.



In addition, there are core **business skills**, such as communication and project management that are valuable across many roles. These are described in the Business Skills section of the framework. Although it's clear that business skills will be valuable in any role, we have tried to indicate those that are particularly important for each business domain, in the context of Business Insights.

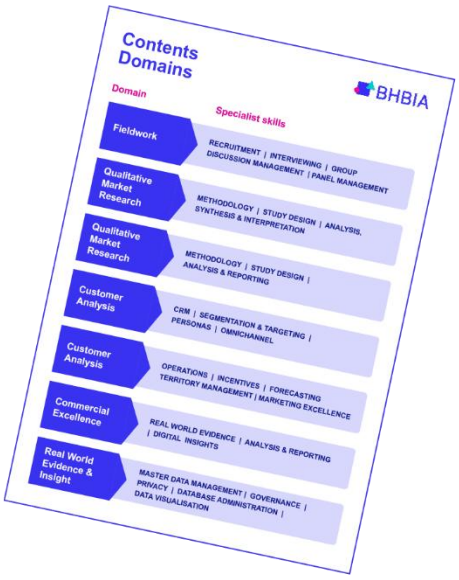
We also identified three key levels of **career experience**, which we have called the **'Emerging Professional '**, the **'Established Professional '** and the **'Leading Professional '**.

up to 3yrs	up to 10yrs	10yrs +
Emerging Professional	Established Professional	Leading Professional

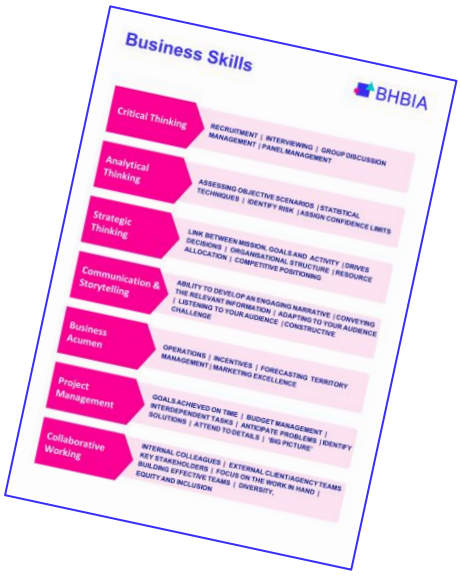
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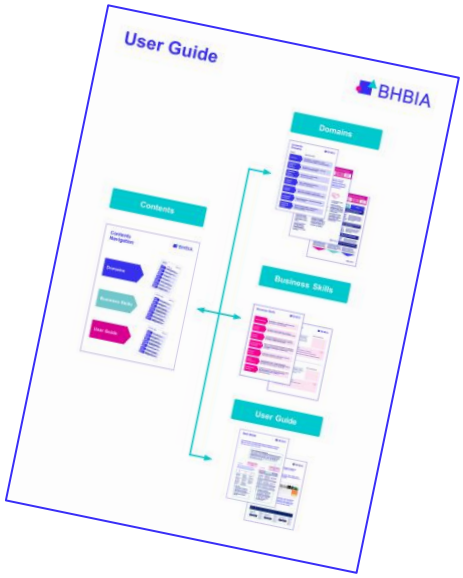
Domains



Business Skills



User Guide

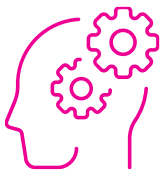


Fieldwork

CORE COMPLIANCE KNOWLEDGE

- L&E Guidelines for MR
- L&E Guidelines for DA
- Adverse Event Reporting

Fieldwork involves the logistical organisation and conduct of market research surveys, interviews and meetings. Every primary research project has an element of fieldwork, from recruiting panels of subjects to conducting focus group meetings. Some research organisations carry out their own fieldwork but there are other agencies, working as contractors, that specialise in recruiting respondents or carrying out fieldwork.



- Fieldwork requires an **understanding of the subjects for research:** this primarily involves physicians, patients and payors
- Research often necessitates the **handling of personal and/or sensitive data,** so you will need to be fully conversant with data protection regulations
- A good working knowledge of **NHS organisations** is important, alongside understanding of specific therapy areas, in order to conduct fieldwork for some projects
- You need to understand current guidelines on **providing incentives to research subjects**, including client fair market value rates



- Specialist software applications, such as **Confirmit and Decipher**, may be used to design and administer online questionnaires, and manage panels of respondents
- Patient diary and behavioral research applications like **Field Notes Community** (also used for consumer research) are commonly used tools
- There are specific **skills relating to conducting interviews and meetings** in an objective way that can be improved with training. This is essential in carrying out recruitment and fieldwork



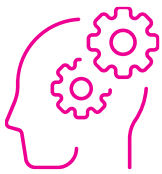
- **Communication skills**, are important
- Organising fieldwork requires excellent **project management** skills, as you will often be working within budget and time constraints to deliver results
- You will often be working with colleagues in other organisations or agencies and so **collaborative working skills** will also be important for you

Qualitative Market Research

CORE COMPLIANCE KNOWLEDGE

- L&E Guidelines for MR
- L&E Guidelines for DA
- Adverse Event Reporting

Qualitative Market Research projects are aimed at gaining a general understanding of the marketplace, based on relatively small sample sizes. The results of qualitative research are not statistically representative, the aim being to uncover general attitudes and behaviors, and to understand how the motivations behind these can be affected. Typically, qualitative research uses in depth interviews group discussions, observational techniques and desk research, and reports are narrative in nature.



- A thorough knowledge of **NHS operations** is important in order to understand responses given by HCPs
- Depending on the field of research, you may need detailed knowledge of a specific therapy area
- In order to understand the commercial context of any research project, it is important that you have a good understanding of the healthcare industry, including the **product lifecycle and supply arrangements**
- You will need to have a good grounding in general **research principles and practices** in order to effectively conduct scientifically sound research studies



- There are software applications specifically designed to help with discussion guide design and analysis
- Content analysis - **codifying/grouping text responses**
- Emergent technology such as **bulletin boards and AI technology**
- Some specific interviewing tools **(projective/enabling techniques)** can be more useful than direct questioning for helping uncover certain attitudes



- You will need excellent **communication skills** to deliver compelling insights from any research study
- **Project management skills** are critical to get studies complete on time and within budget
- Many qualitative research projects produce a lot of unstructured responses. Excellent **critical thinking skills** will be important for you in interpreting these and uncovering the key factors that will ultimately answer the research question

Domains

BHBIA

Quantitative Market Research

CORE COMPLIANCE KNOWLEDGE

- L&E Guidelines for MR
- L&E Guidelines for DA
- Adverse Event Reporting

Quantitative Market Research is used to answer business questions needing numerical answers, to a greater or lesser degree of precision. It is often used in forecasting the potential for new products, segmentation and pricing strategies. Quant studies use relatively large samples of respondents that should be statistically representative of the population to which the results will be applied (e.g., specialist clinicians).



- A thorough knowledge of **NHS operations** is important in order to understand responses given by HCPs
- In order to understand the commercial context of any research project, it is important that you have a good understanding of the healthcare industry, including the **product lifecycle and supply arrangements**
- Usually, quantitative research is subject to statistical testing, and you will need to have **a good understanding/awareness of statistical principles and methods**, even though this aspect of the work may be carried out by third party specialist organisations



- Many quantitative research projects use online surveys to collect responses from large numbers of subjects
- You will need to understand study and analysis types like awareness, trial and usage studies **(ATU)**, detail follow-up studies **(DFU), latent class and conjoint analysis**
- You will use a **variety of statistical analysis tools and methods** such as correlation and significance testing, descriptive statistics etc. using specialist software such a **SPSS or R studio**
- As well as manipulating large amounts of data, it is essential that you have a good understanding of **data visualisation principles**
- The results of quantitative studies are often incorporated into **online dashboards (Power BI/ Qlik/Tableau etc)**



- Good **analytical thinking skills** will help you in both planning studies and interpreting the results
- **Critical thinking skills** enable you to objectively assess the significance of results and avoid bias when delivering the findings
- Conducting research studies requires good **project management skills** to ensure results are produced with time and financial constraints

Domains

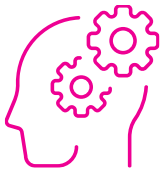
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Customer Analysis

CORE COMPLIANCE KNOWLEDGE

- L&E Guidelines for MR
- L&E Guidelines for DA
- Adverse Event Reporting

Customer analysis involves collecting, analysing and presenting information about the organisation's external stakeholders, particularly health care professionals. Details of contacts and communication between the company and its customers are managed in a structured way, usually in a Customer Relationship Management (CRM) system, so that the customer analytics team can provide insights to support critical business decision making processes.



- You will need to be up to date with **NHS structural changes** and understand how these may affect your organisation's operations and structures, including it's salesforce.
- Because much of the customer data you work with may contain **personal/ identifiable information**, you must have a **thorough understanding of current regulatory (GDPR) and governance guidelines**, especially concerning issues around consent.
- Because data may come from different sources, there may be **problems of compatibility and data quality**. It is important that you understand these issues to avoid giving misleading conclusions.



- Customer data is held in a proprietary **CRM system**, which is customised to meet the organisation's needs
- **Data on prescribing and in-market sales** may be sourced under licence from third party suppliers. These may need to be imported or linked to the CRM system.
- Data management and analysis, particularly combining data from multiple sources **may involve writing or editing code**, so a familiarity with some of the more important languages, including **SQL, Python and R** can benefit.
- Customer analytics are frequently presented through **interactive dashboards such as Power BI, Tableau or Qlik**. To use these effectively you will need a good understanding of the **principles of data visualisation.**



- To make sense of information, perhaps covering many transactions you will need good **analytical thinking skills.** You will also need critical **thinking skills** to ensure that you are using the most appropriate techniques and that the results of your analyses can be objectively validated.
- You will need to deal with challenges and to constructively challenge conclusions that may be inaccurate or unclear. All of this means that you will need excellent **communication skills.**
- In order to appreciate the commercial reality of the relationship between your organisation customers, you will need a high degree of **business acumen.**

Domains

BHBIA

Commercial Excellence

CORE COMPLIANCE KNOWLEDGE

- L&E Guidelines for MR
- L&E Guidelines for DA
- Adverse Event Reporting

Commercial excellence is concerned with forecasting and ensuring that all the organisation's promotional resources are deployed optimally to meet the objectives of the business. The salesforce is usually the largest and most important element of this, and so much of the work involves configuring territories, monitoring activity and setting targets.



- Sales territories need to be aligned geographically with NHS organisations, which can be a complex process, given the different ways in which primary, secondary and tertiary health services are organised. Therefore, you will need a **thorough understanding of NHS operations**
- Monitoring salesforce activity linked to HCPs may involve use of personal information, it's important that you're aware of the relevant **governance and regulatory requirements**
- A **detailed understanding of the supply chain** operating in the market may be important in terms of setting targets, for example reconciling ex-factory sales with in-market use



- **Specialist software is often used to configure territories, manage incentive programmes or produce brand performance reports.** These may be part of or linked to the organisation's CRM system
- **Third party data and software may be used to report sales performance.** You will need to be familiar with these, you will need to understand how different data sources relate to one another.
- **Forecasting involves a variety of techniques, such as statistical projections, patient flow modelling and analogues.** Whilst these can be effectively implemented using Microsoft Excel, there are also proprietary tools that you may need to work with



- **Communication skills** are critical, including the ability to constructively challenge effectively
- You may be working across several different areas of your organisation and so **project management skills** will be important for you
- **Business acumen**, in particular understanding the return generated by investment in salesforce and other resources, will help you work with colleagues and senior managers in brand teams and other departments

Domains

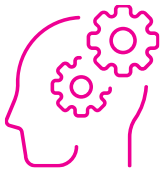
BHBIA

Real-World Evidence & Insights

CORE COMPLIANCE KNOWLEDGE

- L&E Guidelines for MR
- L&E Guidelines for DA
- Adverse Event Reporting

Evidence and insights generated from the analysis of real-world data is covered by this domain. RWE may come from traditional sources such as publications, clinical trials, HES, or from dynamic digital and social media sources. RWE analysts can use this information to reveal details of treatment pathways, disease burden, behaviours and attitudes, Key Opinion Leaders & Digital Opinion Leaders, and other factors that can help gain deep insights into the way in which key markets operate.



- Each data source will have its own technical and data quality issues, and familiarity with these will be essential. The ability to **query and interpret numeric and text data in a systematic way** is key to generating sound evidence
- Some data sources contain sensitive or personal data. Even if you are not working directly with the raw data, you will need to **understand the latest guidelines about the legal basis, governance and security requirements under which the data may be held** and how the outputs of your analysis may be used
- Clinical trial and other scientific publications often include technical statistical analysis, and so **a grounding in statistics will be very useful**



- When working with large datasets, you may be using **special AI/ML software packages**. Training on these may be provided by the software supplier
- For clinical trial information, you will probably be using online databases, such as **PubMed**
- Digital and social media insight generation will involve the use of social listening platforms like **Groundwatch and Synthesio** to write and launch queries and interpret the findings



- Because RWE data may be used in unconventional ways, you will need good **critical thinking skills**
- **Analytical thinking skills** are important when dealing with statistical information and large, often unstructured, data sources
- In order to deliver compelling insights from RWE analysis, you will need excellent **communication skills**, ranging from skilled **storytelling skills** to data visualisation capabilities

BHBIA

Data Working

CORE COMPLIANCE KNOWLEDGE

- L&E Guidelines for MR
- L&E Guidelines for DA
- Adverse Event Reporting

Data working refers to the management of transaction level data. This involves designing and maintaining appropriate database structures, ensuring that these are available to other analysts to work with. This includes maintaining appropriate authorisation and access controls.



- A good understanding of the **principles of database architecture, design and management**
- Currently most data is held in a relational database built and maintained using a variety of structure query language (SQL). You will need to **understand how SQL is used** to manipulate data and data structures.
- Recently, new ways of holding and interacting with large volumes of data have begun to emerge **(NoSQL platforms)**, so it's likely that you will need to be familiar with new ways of working in the future
- Data working may involve working with personal or sensitive data and so it is essential that you are fully conversant with governance and regulatory issues relating to **data security and privacy**



- There are several proprietary databases available, and each comes with specific tools and add-ins to support **database extraction, transformation and loading (ETL) operations**. You should understand the query tools used to manipulate data.
- Platforms like **Azure** are increasingly taking the place of, or complementing, more traditional SQL based relational databases
- An understanding of design and/or management of **Power BI, Tableau or Qlik dashboards**, as a minimum, is becoming increasingly key to data working
- **Predictive analytics** are become more common, so the ability to apply statistical logic to trend forwards is a benefit



- As well as working within the data management team, data workers need to collaborate with other analysts, the IT department and the wider organisation so **collaborative working skills** are essential
- **Project management skills** are key to ensuring that database maintenance is carried out effectively
- Any involvement in Master Data Management (MDM) will benefit from a thorough working knowledge of **key NHS structures and codes**
- Responsibility for the design of data dashboards will benefit from **critical thinking skills** in order to distill the large number of metric requests into actionable visual insights

Domains

BHBIA

Business Skills

Business skills are not specific to any one role or business domain but are generally applicable to all areas. As Business Insight professionals progress to more senior levels these skills become more important.

Furthermore, as you progress through your career your responsibility may become more focused on providing opportunities for others and supporting their development needs:

Emerging Professional

- At a basic level, it is not expected that you will be exhibiting very high levels of business skills, but it is important that **you are aware of what will be required of you**, and that you can recognise how these qualities help senior colleagues perform effectively
- You will be mostly working under supervision, with a limited degree of autonomy, nevertheless you should **look out for opportunities to demonstrate skills** such as communication and collaborative working

Established Professional

- As an established professional , **you possess and use all the skills in this area to a greater or lesser degree**, depending on your field of work
- Furthermore, in many cases you will be managing colleagues and so are **responsible for their professional development**

Leading Professional

- Leaders in Business Insights will demonstrate **all business skills to a high degree**
- In smaller organisations, you may be a **principal, director or owner of the business**. In larger companies, it is likely that you will play an important role in **strategy development, working with the board of directors and external organisations**
- A key responsibility of a leading professional is to ensure that **others in your organisation have opportunities to develop** these key skills as they progress in their own careers

Business Skills

BHBIA

Critical Thinking	SYSTEMATIC APPROACH TO DECISION MAKING & PROBLEM SOLVING | IDENTIFY RELEVANT INFORMATION | GENERATE OBJECTIVE SCENARIOS | CREATIVE NOVEL & INNOVATIVE SOLUTIONS
Analytical Thinking	ASSESSING OBJECTIVE SCENARIOS | STATISTICAL TECHNIQUES | IDENTIFY RISK | ASSIGN CONFIDENCE LIMITS
Strategic Thinking	LINK BETWEEN MISSION, GOALS AND ACTIVITY | DRIVES DECISIONS | ORGANISATIONAL STRUCTURE | RESOURCE ALLOCATION | COMPETITIVE POSITIONING
Communication & Storytelling	ABILITY TO DEVELOP AN ENGAGING NARRATIVE | CONVEYING THE RELEVANT INFORMATION | ADAPTING TO YOUR AUDIENCE | LISTENING TO YOUR AUDIENCE | CONSTRUCTIVE CHALLENGE
Business Acumen	BUILDING TRUST | NAVIGATING CHALLENGING CONVERRSATIONS | ENTREPRENEUSHIP & PERSONAL BRANDING | DECISIONS AND NEGOTIATIONS | BUSINESS PLANNING
Project Management	GOALS ACHIEVED ON TIME | BUDGET MANAGEMENT | INTERDEPENDENT TASKS | ANTICIPATE PROBLEMS | IDENTIFY SOLUTIONS | ATTEND TO DETAILS | 'BIG PICTURE'
Collaborative Working	INTERNAL COLLEAGUES | EXTERNAL CLIENT/AGENCY TEAMS KEY STAKEHOLDERS | FOCUS ON THE WORK IN HAND | BUILDING EFFECTIVE TEAMS | DIVERSITY, EQUITY AND INCLUSION

Business Skills

Business acumen

Involves understanding basic business principles and ensuring that these are considered when choosing between alternative solutions and strategies. As BI professionals develop through their career, they are likely to be increasingly involved in financial decisions and negotiations, and so a good understanding of general financial management will be important.

Note for development:

Good practice indicators include



- *Understanding potential constraints and opportunities*
- *Negotiating cost-effective solutions with external partners*
- *Showing responsible budget management*

Project Management

Skills ensure that business goals are achieved on time and within budget. Effective project managers understand the interdependence of tasks with a programme of work. They can anticipate problems and identify solutions. They need to be able to attend to details, while also maintaining a 'big picture' overview of the state of the project.

Note for development:

Good practice indicators include



- *Setting time points and budgetary milestones for a project and reporting performance against these*
- *Communication with internal and external project stakeholders*
- *Allocation of appropriate resources to workflow items*

Business Skills

BHBIA

Collaborative Working

Is working as part of a wider team either in person, or remotely in individual locations. Effective collaboration with internal colleagues and often with external client/agency teams is important for virtually all projects. This means working with key stakeholders to maintain focus on the work in hand to ensure goals are achieved in a timely manner.

Note for development:

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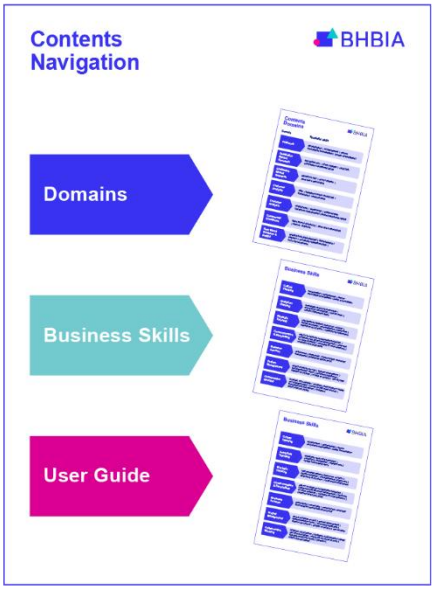
- *Ensuring that workflow changes are understood by all stakeholders*
- *Providing opportunities for stakeholders to make suggestions or voice concerns*
- *Negotiating sensitively with stakeholders to resolve conflicts or solve problems*

Areas noted for development opportunities:		Priority:
Critical Thinking		
Analytical Thinking		
Strategic Thinking		
Communication & Storytelling		
Business Acumen		
Project Management		
Collaborative Working		

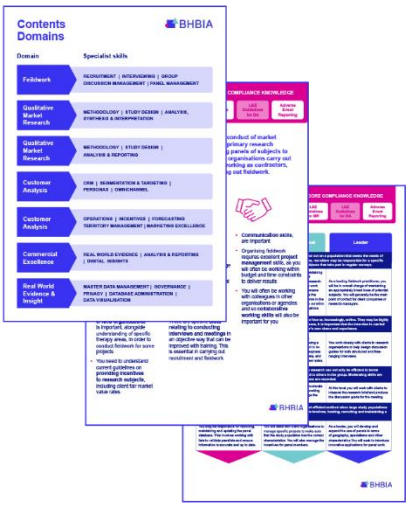
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BHBIA

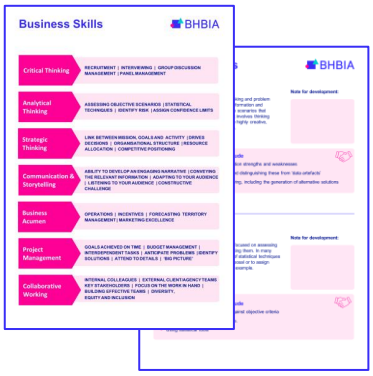
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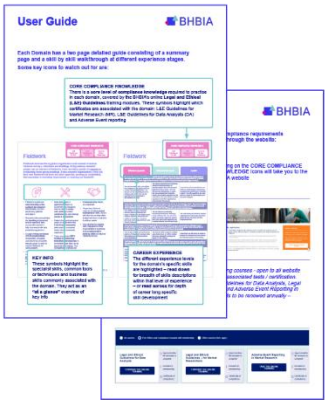
Domains



Business Skills



User Guide

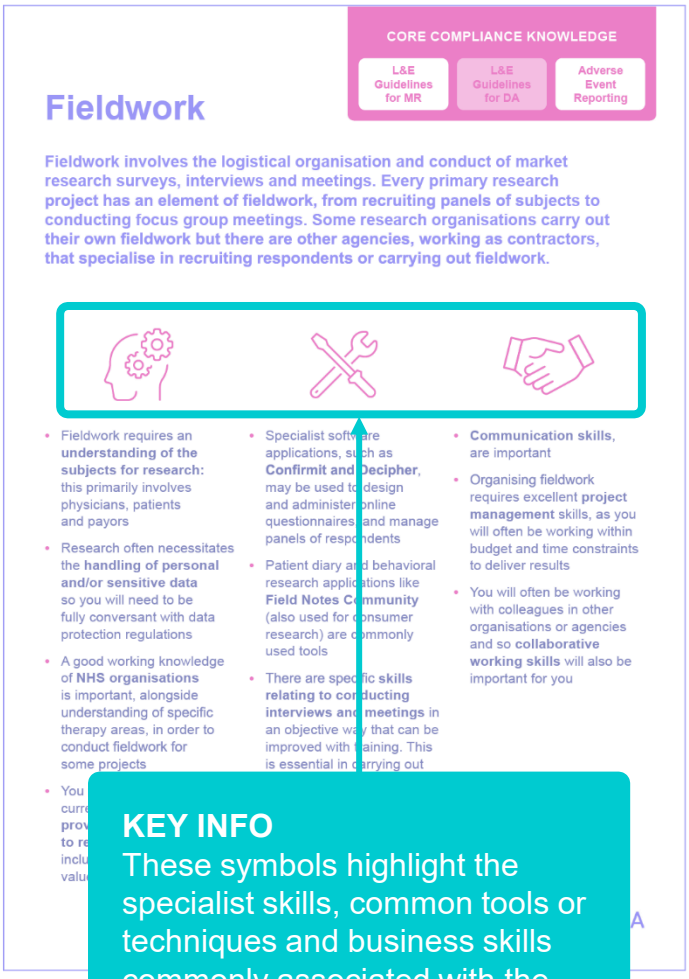


User Guide

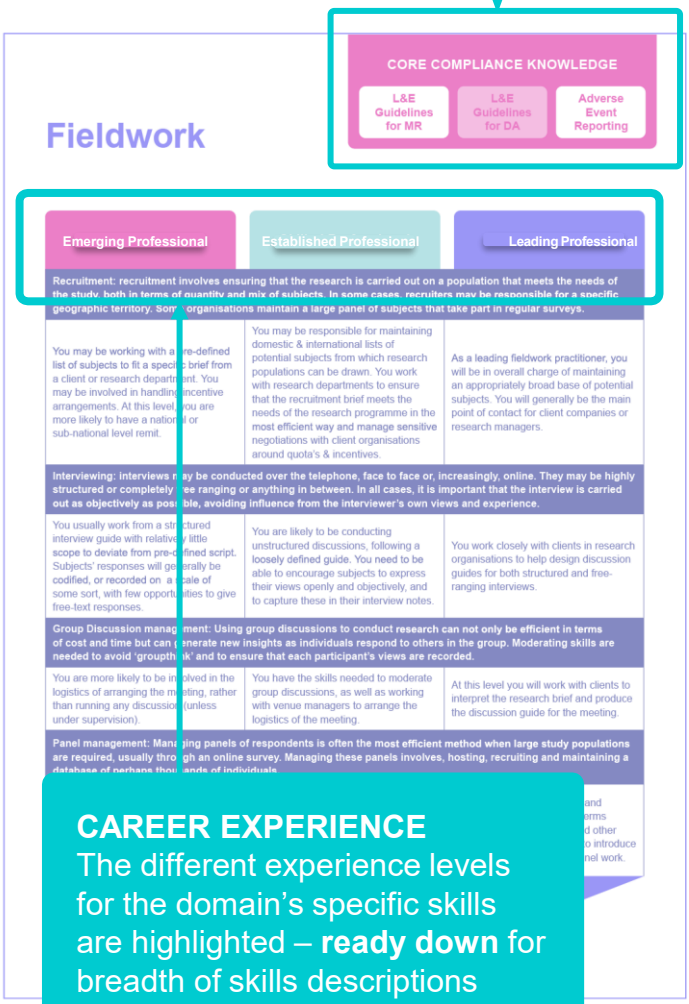
Each domain has a two-page detailed guide consisting of a summary page and a skill-by-skill walkthrough at different experience stages.

Some key icons to watch out for are:

CORE COMPLIANCE KNOWLEDGE
There is a **core level of compliance knowledge** required to practice in each domain, covered by the BHBIA's online **Legal and Ethical (L&E) Guidelines** training modules. These symbols highlight which certificates are associated with the domain: L&E Guidelines for Market Research (MR), L&E Guidelines for Data Analysts (DA), and Adverse Event reporting.



KEY INFO
These symbols highlight the specialist skills, common tools or techniques and business skills commonly associated with the domain. They act as an **'at a glance'** overview of key information.



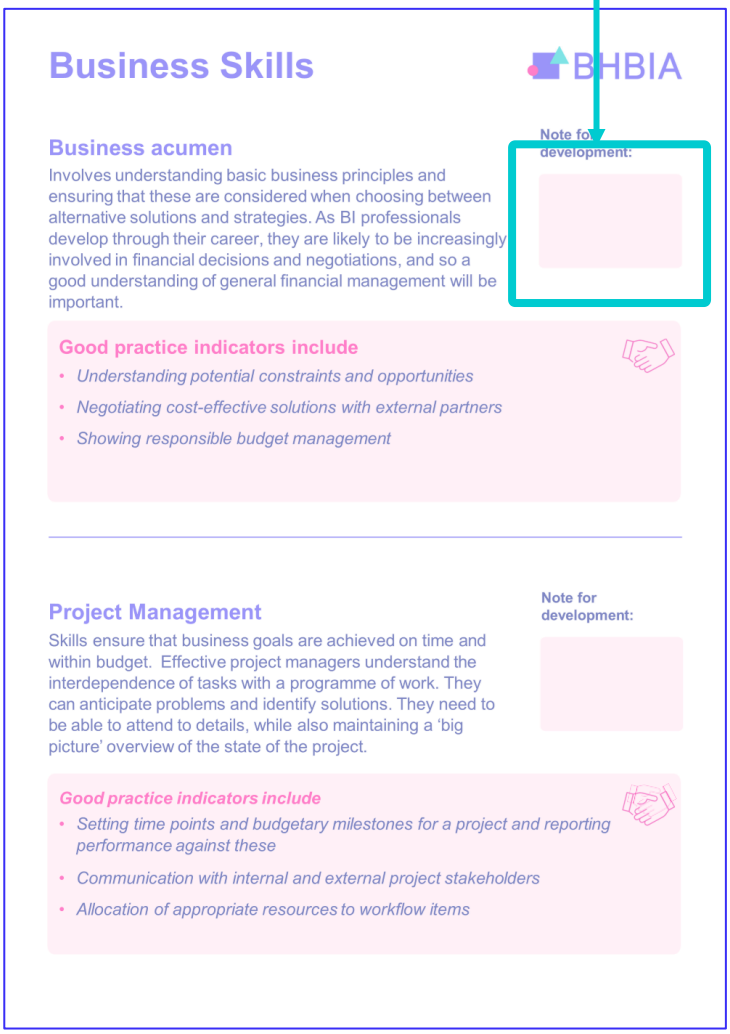
CAREER EXPERIENCE
The different experience levels for the domain's specific skills are highlighted – **ready down** for breadth of skills descriptions within that level of experience – or **read across** for depth of career long specific skill development.

User Guide

The BHBIA recognises that many organisations – particularly larger companies – are likely to have well developed internal competency frameworks and processes in place. The Business Skills described in this framework are intended to sit as a Business Insight view of the skills and behaviours commonly found within our specific roles and disciplines.

NOTE FOR DEVELOPMENT
Rather than provide a rigid review framework, check boxes for periodic self-reflection are provided. If you come across an area you feel you could further develop your skills (with a BI focus in mind), or develop your support for others you may manage, use these check boxes as a reminder.

DEVELOPMENT OPPORTUNITIES
A simple summary at the end of this section is provided for you to collate your needs in one place. You may find one or two areas to be a priority – check these and seek out signposts to development opportunities through the BHBIA or another organisation.



Business Skills

BHBIA

Business acumen

Involves understanding basic business principles and ensuring that these are considered when choosing between alternative solutions and strategies. As BI professionals develop through their career, they are likely to be increasingly involved in financial decisions and negotiations, and so a good understanding of general financial management will be important.

Note for development:

Good practice indicators include

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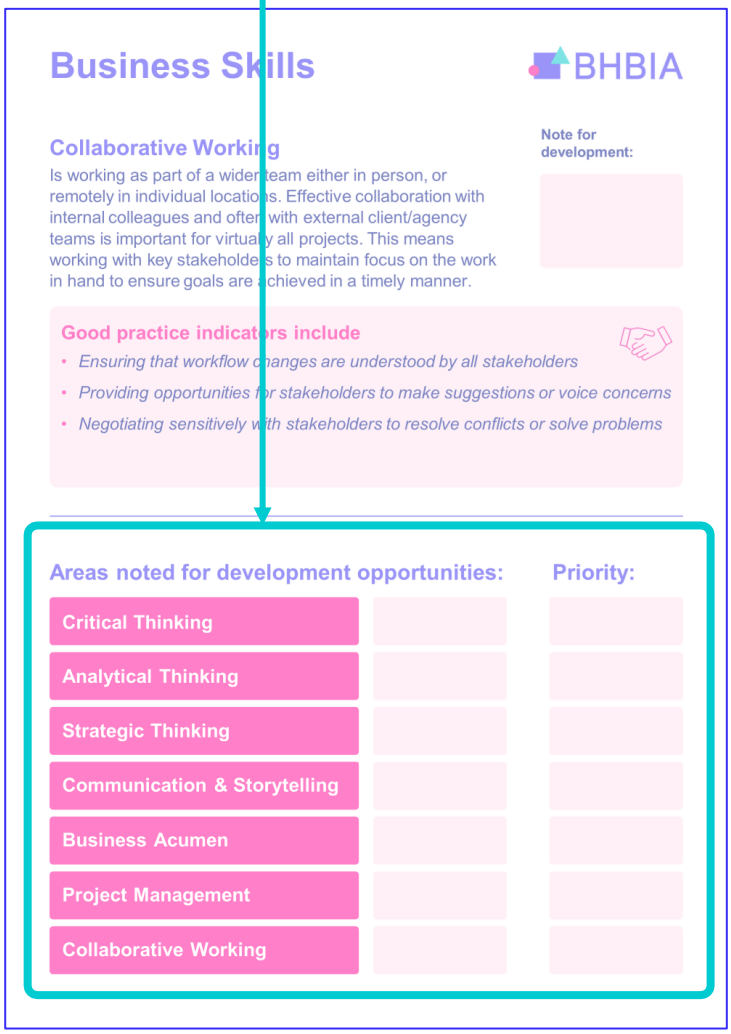
Project Management

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BHBIA

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Note for development:

Good practice indicators include

- *Ensuring that workflow changes are understood by all stakeholders*
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Areas noted for development opportunities:		Priority:
Critical Thinking		
Analytical Thinking		
Strategic Thinking		
Communication & Storytelling		
Business Acumen		
Project Management		
Collaborative Working		

User Guide

For further information about the BHBIA's compliance requirements there are several resources available to you through the website:

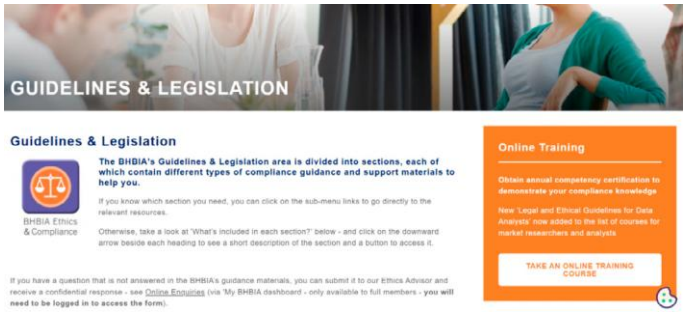


Clicking on the **CORE COMPLIANCE KNOWLEDGE** icons will take you to the BHBIA website

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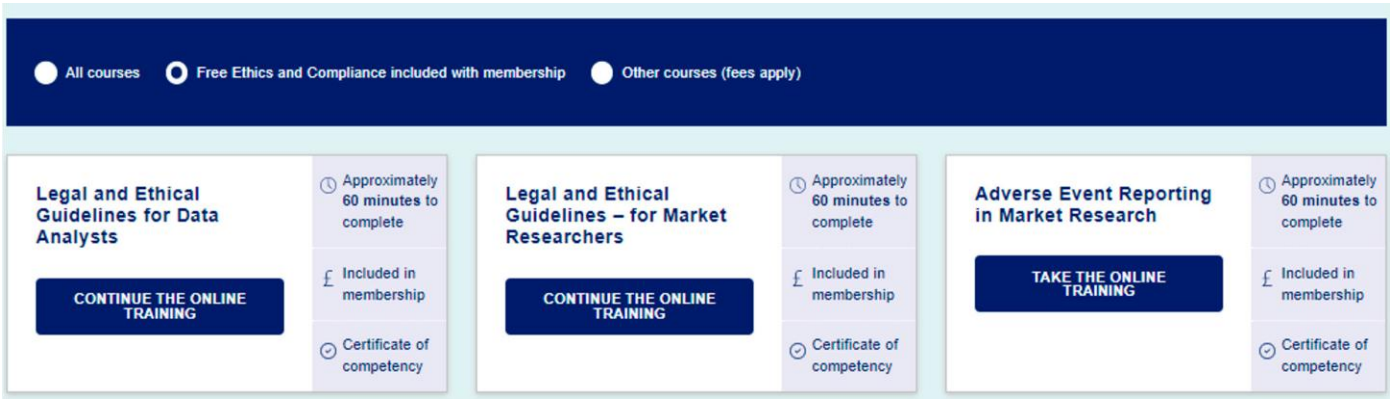
The Guidelines & Legislation page of the website is a good starting point to find out more about the compliance knowledge you may need in your role:

BHBIA | Guideline & Legislation



The BHBIA offers free ethics & compliance training courses - open to all website users, but only BHBIA members can access the associated tests / certification. There are 3 core modules: Legal and Ethical Guidelines for Data Analysts, Legal and Ethical Guidelines for Market Researchers and Adverse Event Reporting in Market Research. Competency certification needs to be renewed annually – from 1st September.

BHBIA | Online Training



Professional Development Resources

The BHBIA supports the continued development of its members through a variety of channels. Click on the options below to read more:

Training – course details and book online

Workshops	Webinars

Self Study – anytime learning and certification

Online Training	Legal & Ethical Guidelines	Webinar Library

Events – flagship conferences to peer communities

Member Events	Connect Events

Development Resources – career support

Skills Framework	Foundation & Business Skills Series	Vouchers

Professional Partnerships - collaborations

MRS CPD	MRS discounts	Intellus webinars

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