

White Paper

Using Behavioral Science to Drive Field Performance

A holistic framework for enhancing engagement and performance through targeted motivational strategies

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Executive summary

In the evolving landscape of commercial operations, data science applications such as Next Best Action (NBA) engines, just-in-time suggestions and real-time alerts are sometimes considered “wonder tools” to guide field force activities. Pharma organizations increasingly rely on predictive analytics and machine learning models to optimize decision-making. However, despite their perceived sophistication, current implementations remain largely unidimensional, designed to push insights and recommendations to sales representatives without sufficiently considering the human factors that influence behavior and drive sustained adoption and action.

This approach, while analytically sound, often overlooks the *why* behind the rep’s choice to either engage with or disregard a recommendation. As a result, field teams may perceive NBA as prescriptive rather than supportive, reducing both trust in the system and long-term compliance.

These systems must evolve beyond algorithmic precision to incorporate human-centric design and integrate behavioral science principles that consider both *how* and *why*. Recommended actions must feel meaningful, achievable and rewarding in order to resonate with reps.

This paper explores the limitations of the current unidimensional model and proposes a more holistic approach, one involving rep-centric insights as foundational to system evolution and engagement success.



Understanding the science behind motivation

Behavioral science reveals that human motivation is complex and multi-dimensional. It shows that people are more likely to act when they find the action meaningful, achievable and aligned with their personal goals. Simply pushing a recommendation, even if accurate, does not ensure a follow-through. Field sales representatives, especially when under performance pressure, need more than a *ping* on their devices. They need to feel that a suggestion is relevant, timely and worth their effort.

Motivation can be effectively categorized into four domains: intrinsic, extrinsic, cultural and environmental. The figure below details how each of these domains influences behavior for sales reps.

Motivation domains



1. Intrinsic motivation: An individual's convictions that drive internal satisfaction and purpose

<i>Locus of self-control</i>	A belief that outcomes are influenced by one's own actions
<i>Autonomy and control</i>	Empowerment to make decisions in the field
<i>Task-to-goal clarity</i>	Understanding how daily tasks contribute to long-term success
<i>Goal focus and resilience</i>	Staying committed to goals despite short-term setbacks



2. Extrinsic motivation: External rewards that are critical in reinforcing desired behaviors

<i>Bonus and incentives</i>	Tangible compensation tied to performance metrics
<i>Contests and awards</i>	Friendly competition that elevates engagement
<i>Promotions</i>	Clear pathways to career progression
<i>Public recognition</i>	Celebrating achievements in visible, peer-driven forums



3. Cultural motivation: A company culture that influences sales rep behavior

<i>Sense of belonging</i>	Fostering a culture where reps feel connected, valued and part of a larger purpose
<i>Collaboration</i>	Promoting teamwork over siloed efforts
<i>Competitive spirit</i>	Channeling healthy competition
<i>Continuous learning and development</i>	Encouraging ongoing skill-building and professional growth as a driver of success



4. Environmental motivation: External conditions that shape sales rep behavior

<i>Physician knowledge</i>	Tailoring approach based on HCP awareness
<i>Access changes</i>	Navigating evolving access and field conditions
<i>Seasonality</i>	Adapting to cyclical demand or attention spans
<i>Regulatory environment</i>	Operating within compliant boundaries

This framework draws on key principles from Self-Determination Theory¹, Expectancy Theory², COM-B³, and the Fogg Behavior Model⁴ to offer a broad view of what drives human behavior and lays foundation for designing targeted interventions, i.e., *why* people act the way they do.

But understanding *why* isn't enough in a fast-paced environment. To operationalize this knowledge, we need to apply behavioral frameworks of "*how*," that **convert motivation into consistent, high-impact actions**.

Driving action with behavioral frameworks

Understanding why a sales representative is motivated is only half the equation. To transform motivation into sustained, high-impact behavior, organizations must deploy real-time behavioral frameworks that guide decisions and actions in the field.

When combined with motivational science, these frameworks help reps engage with insights in ways that feel personal, purposeful and achievable, making the difference between passive awareness and active follow-through.

Next Best Action (NBA) frameworks

 RELATED MOTIVATION DOMAINS: INTRINSIC AND ENVIRONMENTAL

NBA frameworks guide reps to focus their time and energy where it will make the biggest difference. They recommend actions that align with sales representatives' goals, local market conditions, and real-time opportunities. Beyond simply suggesting "what" to do, the most effective NBA designs emphasize why the action matters.

WHAT TO DO	WHAT NOT TO DO
Offer clear, context-aware recommendations that remove guesswork.	Don't push generic, uncontextualized recommendations.
Make suggestions actionable and time-sensitive.	Don't surface actions that are out of sync with a rep's given priorities or schedule.
Align NBA to personal and territory goals.	Don't overwhelm with too many choices at once.
Example: <i>"Dr. Smith has increased prescribing potential in your region. A quick call this week could convert recent interest into action."</i>	

Gamification frameworks

 RELATED MOTIVATION DOMAINS: EXTRINSIC AND INTRINSIC

Gamification can make invisible progress visible, turning effort into recognizable achievement through leaderboards, badges and performance milestones. However, poorly designed contests or short-term SPIFFs (Special Performance Incentives for Field Force) can feel like distractions rather than motivation, especially if the challenge seems irrelevant or misaligned with personal targets.

WHAT TO DO	WHAT NOT TO DO
Design contests for personal growth. Encourage reps to improve their performance over time.	Avoid designing contests solely from a brand perspective.
Choose when to publish results publicly to ensure positive motivation.	Don't overexpose performance gaps or shame low performers.
Align rewards with both effort and engagement.	Don't use "winner-takes-all" mechanics that discourage lower-ranked reps.
Treat gamification as a performance booster.	Don't let contests distract from core targets.
Example: <i>"You're just two actions away from unlocking your Silver Impact badge! This places you ahead of your past quarter's performance curve."</i>	

Content variety frameworks

 RELATED MOTIVATION DOMAINS: CULTURAL AND INTRINSIC

Content variety is key to keeping reps both informed and engaged. When content feels predictable, heavy, or one-size-fits-all, reps are likely to tune it out. The goal is to shift the rep’s mindset from “just another email” to “I want to get the next update.” Variety also allows reps to maintain continuous learning, reinforcing both cultural motivation (team alignment, shared learning) and intrinsic motivation (curiosity, mastery).

WHAT TO DO	WHAT NOT TO DO
Deliver modern content formats: short episodes and quick reads.	Don’t push dense slide decks or text-heavy documents.
Balance mandatory info with engaging, curiosity-led content.	Don’t overload reps with irrelevant or redundant information.
Create a rhythm that builds anticipation for future updates.	Don’t send disjointed messages without regard to timing or follow-up.
Example: “In this new 2-minute podcast, hear how top-performing reps handled Product X objections in virtual meetings this week.”	

Personalization frameworks

 RELATED MOTIVATION DOMAINS: INTRINSIC AND CULTURAL

Reps are more likely to act on insights that reflect their territory, customer relationships, and current performance stage. Personalization should distinguish between content the rep *must* consume (critical for performance), and content the rep *may* choose to consume (enhances performance, builds mastery).

WHAT TO DO	WHAT NOT TO DO
Tailor insights to performance tiers.	Don’t push one-size-fits-all content to all reps.
Use past content interactions to refine recommendations.	Don’t ignore engagement patterns or feedback.
Give reps control and choice to subscribe to optional content streams.	Don’t force-feed non-critical content to every rep.
Separate critical content from enhancement content.	Don’t overwhelm reps with irrelevant or redundant communications.
Example: “Based on your recent focus on Tier-1 HCP engagement, would you like to get weekly best-practice summaries from top-performing peers? Click here to subscribe.”	

While the above frameworks provide structure, their true effectiveness lies in the quality and relevance of the insights delivered. Categorizing and packaging insights into purposeful formats ensures clarity, engagement and timely responses.

Generative AI as an enabler of motivation-driven action

Generative AI (GenAI) can play a critical role in operationalizing behavioral frameworks, turning motivational insights into real-time, field-ready actions. Rather than asking reps to comb through static dashboards or lengthy emails, GenAI surfaces context-aware recommendations through intuitive, low-friction interfaces like chat, voice, or embedded CRM prompts.

This dramatically reduces cognitive load and supports key motivational levers such as autonomy, task clarity and convenience. When insights are delivered in the moment, in the right format, and in the rep’s existing workflow, they feel timely, personal and achievable, transforming passive nudges into purposeful action. In this way, GenAI serves as a behavior-shaping tool that closes the gap between insight and execution.

Insight categories that drive engagement

For behavioral science to translate into daily field actions, insights must be relevant, contextual and easy to act on. Sales representatives are far more likely to engage with information that supports their goals and fits within their mental model of success. Categorizing insights into familiar, digestible formats reduces friction, increases uptake, and ensures reps stay focused on high-value activities.

These categories serve as the “how” of motivational strategy, delivering personalized nudges that align with intrinsic, extrinsic, cultural and environmental motivators:



Milestone celebrations

- Share success stories where reps have significantly impacted customer outcomes.
- Highlight individual record-setting or positive metrics to promote self-confidence and celebrate incremental growth.
- Celebrate team achievements and group performance, reinforcing collaboration and a sense of belonging to a collective mission.



Progress markers

- Allow reps to set their own goals for the upcoming period, supported by reminders of those goals.
- For reps with significant gaps, offer proactive problem-solving alerts to avoid missed opportunities.
- Provide progress bars or graphs that show reps their journey toward key milestones.



Weekly digest

- Share data-driven insights into customer behavior on a regular basis, helping reps anticipate needs and adjust their approach as necessary.
- Include tips, articles, or video snippets that help reps refine their approach, to encourage continuous learning.
- Highlight key market trends that might affect sales strategy or success to keep reps well-positioned in an evolving environment.



Competitive updates

- Celebrate top performers not just in terms of numbers, but through qualitative recognition in added value or problem-solving.
- Instead of global leaderboards, offer segmented leaderboards based on regions, territories, or product categories, so reps can compete in more relevant ways.
- Introduce friendly, short-term competitive challenges that focus on specific sales behaviors.



Coaching opportunities

- Let managers provide specific, actionable feedback tailored to each rep's strengths and areas for improvement.
- Suggest potential mentorship pairings based on experience, skillsets, or performance gaps.
- Offer just-in-time coaching insights triggered by a rep's performance data in real time. This timely and actionable feedback fosters better engagement and performance improvement.

By mapping insights to motivational triggers, these categories help bridge the gap between data and action ensuring recommendations feel timely, relevant and human-centered.



Considerations for a successful implementation

Even the best-designed behavioral frameworks and insight categories will fall flat without the right delivery and operational conditions.

Successful implementation must orchestrate numerous complex factors, which include:

- **Robust and reliable data**, both structured and unstructured, as a basis for credible insights personalized to each rep's needs.
- **An open-minded culture** with an appetite for continuous learning and behavioral change.
- **Access to reps through their preferred communication channels.**
- **Message prioritization and strategic throttling** to ensure valuable insights rise above the noise.

When these elements across technology, culture and communication come together, behavioral science becomes an operational asset. Personalized motivational insights can scale across the field force, increasing engagement, improving performance, and creating a more empowered, data-fluent sales culture.

From insight to impact

Combining behavior science approaches alongside proven data science techniques can drive a paradigm shift in how life sciences organizations engage their field teams. Rather than relying solely on performance pressure, companies can activate deeper psychological drivers; helping reps feel more informed, appreciated, and connected to meaningful goals.

By doing so, organizations can transform their sales strategies. Recommended actions become more than just suggestions. They become trusted, timely, and actionable guidance that drives long-term success.

To learn more about how IQVIA Orchestrated Analytics Field Effectiveness can help your organization achieve these goals, contact us at iqvia.com/oa.

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