

New Process for Customer Education

Situation

- Sales reps were creating their own education materials, tying up valuable company resources.
- Customers were getting inconsistent messages across the country

Task

Create educational tools that would enable sales representatives to easily deliver quality customer education with consistent messaging.

Action/Approach

Developed and implemented "Meeting in a Box", a self-contained educational kit for the sales force.

Development

Consisted of three major components

1. Instructor Guide
2. Meeting Resource CD
3. Presentation CD

Instructor Guide

The Instructor Guide was a resource for individuals involved in the planning and coordinating of educational events and walked individuals through the entire process from forming an agenda and learning objectives, to executing the meeting successfully.

Meeting Resource CD

The Meeting Resource CD included templates such as letters, check lists, workshops and other various meeting materials to allow field representatives to customize the program for their customers needs.

Presentation CD

The Presentation CD included educational materials in the form of PowerPoint presentations on a variety of topics relevant to the intended audiences of physicians, fellows and allied health professionals. All of the presentations were approved by legal and regulatory groups for customer use. Additionally, this gave Medical Education control over knowing what content and what messages were being shown to customers.

Implementation

1. Develop and train a team of "educational champions" who could be used by Medical Education to distribute information on all of the educational opportunities available to customers.
2. Created and delivered a "train the trainer" program
 - Develop agenda
 - coordinate meeting logistics
 - deliver the lectures
3. Formed an on-line ordering system which allowed field reps to order custom binders with copies of the appropriate lectures for their educational event.

Results

This new process has revolutionized the way field education is delivered to customers, increased the amount of education being delivered and resulted in more consistent messaging to customers.

