



## Questionmark Case Study

### Onboarding new sales reps at Pacific Pulmonary Services

#### Background

Pacific Pulmonary Services (PPS) is an in-home provider of medical equipment and services for patients with chronic respiratory diseases, such as oxygen equipment, respiratory medications, and sleep therapy equipment. Headquartered in Novato, Calif., the company has about 100 field centers and 1,200 employees in the western United States.

#### Problem

Prices for the equipment and services PPS provides are consistent across the market, because insurance pays for them. That means PPS can only distinguish itself with better sales and service execution. But sales reps were often in the field for more than six months before they received any classroom training. Many field managers were relatively new to the organization and weren't sure how to get involved in the reps' training. And the company's decentralized structure made it vulnerable to inconsistencies when different reps were following different procedures.

The process of bringing reps to a central location for classroom training was also costly and time-consuming. And PPS wanted them to get some practical field experience first, so that they would have some context and get more out of the training.

#### New Onboarding

In 2005, the PPS training department decided to change the company's onboarding process. They identified each core phase of new reps' onboarding and created checklists of everything new reps should know, see and do in each phase. These phases included such tasks as proper documentation and observation of set-up processes for oxygen, nebulizers, and other types of equipment or medication. Based on those checklists, the department created assessments to test whether employees had learned what they needed to know.

Launched in 2006, the new system of assessments and compliance tracking (internally branded as FastTrack) required new sales people and managers to take 16 assessments, most during the onboarding process. Additionally, annual compliance assessments confirm

employees' continuing competence and help PPS demonstrate to an accrediting agency that the correct procedures are being followed. The assessments replaced classroom training, and now employees learn from their managers and demonstrate competency without having to waste valuable field time.

#### Oral & Written Assessments

Today FastTrack only has five assessments, which gives PPS a larger pool of questions to pull from and is more convenient for sales reps in the field. Two designers and two trainers create questions for each assessment, and then field managers and field operations SMEs review and edit those questions.

Each assessment has 25-35 questions. Two assessments are online, while the rest are oral. For oral assessments, a sales rep takes the assessment from his or her manager, who then fills out the assessment online. Perception's e-mail tool immediately alerts all necessary parties about the employee's score and compliance status.

#### Results

The benefits of the system are many. Field managers are much more involved with their sales reps' training, and trainers spend time with reps in the field instead of the classroom. Perception has helped the company involve managers in establishing consistent standards across the organization. The company has saved \$540,000, and sales rep performance (measured by the number of oxygen equipment set-ups) has increased. And it's much easier to achieve, track, and communicate compliance to the accreditation agency.

#### More information

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