PDI

How PDI Keeps Reps and Customers Prepared and Compliant During COVID-19

Challenge:

To accelerate time to productivity for new reps, the sales organization at PDI was in need of a better way to deliver more consistent, cost-effective training and onboarding. And that wasn't all.

Stephen Milton, Director of Sales Training and Development, was concerned that the proper knowledge transfers were not taking place across the sales organization, which could cause reps to speak out of turn – and out of compliance. More broadly, the company also needed to identify a better way for sales managers to train and coach reps no matter where people were located.

Ultimately, it was up to Stephen to establish a seamless process to create content and training and deliver it to the sales team so reps would always be prepared with the most accurate, compliant information.

Solution:

Stephen led the search for a solution that could meet the sales organization's urgent needs. He was a three-time user of Brainshark's sales readiness and enablement platform and immediately saw the synergies between the technology's capabilities and PDI's business challenges.

Not only was Brainshark easy to use, but PDI could quickly design content and provide reps with an accessible library of on-demand training and presentations. When Stephen showed his subject matter experts how to create content in Brainshark, they were, "just blown away at how easy it is".

PDI's sales team accesses Brainshark content, training and coaching resources right from Salesforce and regularly respond to video coaching challenges via their mobile devices.

The Brainshark Advantage:

The Brainshark implementation went seamlessly as Stephen knew it would from his prior Brainshark experience, saying, "the customer support team at Brainshark is second to none." From there, PDI started producing dedicated curriculums for new hires for all PDI product lines, which include video coaching activities to ensure reps can recite back what they learned. Because Brainshark has proven so effective for sales onboarding, PDI now uses it for training new hires across other departments.

For PDI's territory sales managers, it can take time to build creditability with clinicians. This is where the sales team relies heavily on Brainshark for coaching. Each regional sales team conducts virtual Value Analysis Briefs to practice how they pitch the economic and clinical benefits of PDI's product

> "We're using coaching a lot more in the last few months than we ever have before, especially with COVID and the opportunity for managers to coach and train remotely."

Stephen Milton
Director of Sales Training & Development, PDI

RESULTS & VALUE:

- Improved onboarding processes with **clear training objectives**

- **Helped secure $2 million in revenue** in part due to ability to support custom, in-service training for customers during the pandemic.

- Video coaching helped territory sales mangers improve their **message consistency and accuracy** when speaking to clinicians

ABOUT PDI:

PDI provides innovative products, educational resources, training, and support to help prevent Hospital Associated Infection transmission.

portfolio. From these sessions, knowledge and skills gaps are discovered, and the Clinical Science Liaisons for each team issue coaching activities to address the specific gaps in product or clinical knowledge. Stephen said he often uses these coaching activity submissions to build future training content and showcase 'what good looks like.'

For PDI's customers, PDI uses Brainshark to create custom, in-service trainings -- made up of slides compiled by PDI where the customers could record their own audio and add their own branding. These presentations replaced in-person customer training sessions and helped keep clinicians trained and compliant with the latest PDI product information. These custom presentations have been critical for PDI's territory sales managers throughout the pandemic since many have not been allowed on hospital or healthcare organizations' premises.

READINESS TRIGGERS:

- Need for more consistency and process around training

- Need for a roadmap for new hire onboarding

- Need for increased accountability or validation of skills and knowledge among sales reps