<u>Training Statuses that Need Tracked by How Many Days It Takes to go from the Date Assigned to Trainer to the Date Transitioned to Support</u>

Updated 7.12.24

Training Statuses that a customer moves through with each status:

Setup Surveys Sent

The Sales Manager sets this status when the contract is processed for the new client and the Company Account Type is set to Customer in Training for all Companies in group training that are NOT MediTrans clients and for Tier 1 Level 1 on 1 Trainees.

Ready for Setup Review

Training Manager will set this status after a client completes their setup surveys-triggering a link to book their one on one with their trainer to review their setup is complete. An introduction letter for their assigned trainer will go out with the link to that trainer’s calendar.

Ready for Webinar 1 Trip/Scheduling

The trainer sets this status AFTER the 30 min one on one confirming their setup is complete and that the client is ready to receive the link to reserve their spot in the 1st group training session webinar where they will learn trip intake and scheduling.

Ready for Webinar 2 Dispatch/Mobile

The trainer hosting the 1st Group webinar session will mark all attendees of that session as G4 indicating that they are now ready to receive the link to book themselves for the 2nd Group webinar training session that will cover Dispatch & Mobile app.

Ready for Group 60 Go Live

Trainer that hosted the 2nd group webinar training session the client attends will mark the company as G5—meaning they have attended all sessions and are ready to have their go live check in with their assigned trainer and will get the link to book that session in the email that goes out when this status is triggered.

Live

Trainer will set the Training Status to Live when they have completed ***training via Group or Via Tier 1:1 on 1 training*** and confirm the client is using the system. Reminders for Mobile and Dispatch Training go out when set. Trainer’s link will go out for the TP to book a billing training for 1 week out from the meeting they are in prior to marking this status as a post-live meeting with the client. Clients will reach out to the trainer if they need more time on billing. Billing webinars coming later this summer for extra help with this and streamlining.

Transition to Support

Training Manager sets the Training Status to Transition to Support when the account is checked and confirmed LIVE. Reminders go out and info from the Training Manager checking in on the client. The client is moved to Active and out of the Training Department except for 1 more billing training/post-live follow-up with their trainer booked at the last session with the trainer.

Book MediTrans Webinar

The trainer will set this status when the client is ready to attend the MediTrans webinar on scheduling and dispatch/mobile app after completing their setup surveys and watching the intro video. When status is set, the link to book the MediTrans group webinar session goes out to the client.

Premiere Client

Client is set to this status as a new client ready for their first Kick-Off Session

Extra Paid Training

The Training Manager sets the Training Status to Extra Paid Training when the client pays for 30 days of extra training. They are moved back to the Training Department and need to be referred to the assigned trainer by Support.

Unresponsive Client

Training Manager sets the Training Status to HOLD-No Contact Active if the client is not reachable and training cannot be completed or if they are trained but not using or responding and transitions them to support.

Waiting on Trips

Trainer sets the Training Status to Waiting on Trips if the client has completed their setup training and is stuck waiting on trips/contracts. The trainer will check in weekly with them for 30 days to see how that is going and notify the Training Manager if they do not see trips after the 30-day mark.

I have also updated all workflows to have alternate paths for specialized workflows that address MediTrans abbreviated training based on the new “Type” spot on the bottom left of the Company side bar in HubSpot that allows for the trigger to be activated to guide those clients to emails with that type. That way, different statuses are not needed for most steps in the training process.