

USE CASE

# Physician Training

A Fortune 500 medical device manufacturer turned to TrueContext for assistance with challenges in training physicians and staff on devices featuring advanced technologies.



- Standardized procedures
- Increased efficiency
- Improved agility
- Streamlined processes
- Better compliance & audits

### COMPLEX, MULTI-STEP PROCESS

Each device has multi-step standard operating processes that physicians must recognize and follow. The company wanted to build and scale complex checklists used by field service engineers to train physicians.

### LARGE WORKFORCE WITH DIVERSE EXPERIENCE

With over 20,000 employees spread globally, the organization needed a solution that experienced and newer personnel with varied work experiences and attention spans could easily adopt.



# The challenge

### SCALABILITY

Physician training is conducted at client sites like medical offices and hospitals, so the solution had to be easy to use and scaled across geographies and for unique medical products.



## **COST CONSIDERATIONS**

The company conducts pre-employment safety education, training workshops, jobsite coaching and gives each employee “Stop Work Authority” to mitigate safety issues. It needed a way to scale safety-related forms to address existing issues easily.

## **COMPLEX REGULATORY REQUIREMENTS**

Each medical device has specific compliance rules from different authorities across various countries. Frequent changes to regulatory requirements meant the company needed a solution that could easily update training assets in real-time.

# The challenge

## **MULTIPLE SOLUTIONS IN USE**

A mix of paper forms and legacy solutions meant field technicians and administrative staff had to perform manual uploads and data entry work. The inefficient process increased costs and harmed data accuracy.



*The main outcome is the automation and ability to ensure everything is being ticked off. Previously it was all done manually so steps were missed. Now everything is done automatically through conditional logic... so it really takes the guesswork out.*

**BUSINESS OPERATIONS MANAGER**  
FORTUNE 500 MEDICAL DEVICE MANUFACTURER

# Outcomes

With TrueContext, the Fortune 500 medical device manufacturer has improved its physician training capabilities. They have generated positive business outcomes in several key areas:

## ▶ STANDARDIZED PROCEDURES

TrueContext helped the company's technicians adopt tested, step-by-step standard operating procedures to complete service work orders. Field service engineers have submitted over 4,500 unique forms over the past six months alone.

## ▶ INCREASED EFFICIENCY

Physician training is often bundled with device installation. With TrueContext's offline capabilities, the company can conduct training in remote locations with limited internet connectivity, curtailing costs. Field engineers can now immediately invoice medical professionals for replacement parts and additional services provided during training.

## ▶ IMPROVED AGILITY

With the need to create and scale training assets in real-time to meet changing regulatory needs across jurisdictions, TrueContext visual, no-code builder helped the medical device manufacturer create and scale training assets in real-time. The company's citizen developers are now more agile and able to make changes and implement forms quickly.

## ▶ STREAMLINED PROCESSES

Leveraging TrueContext University's comprehensive training program, the medical device manufacturer easily scaled complex training checklists and streamlined its mix of paper-based forms and legacy solutions.

## ▶ COMPLIANCE AND AUDITS

TrueContext's built-in security features such as SOC 2 compliance, geo-stamping, and FDA Title 21 CFR Part 1 certification ensure the company meets traceability, accountability, and data integrity standards. Seamless integration with Salesforce ensures data is captured and stored securely, further ensuring the company maintains data integrity. It's now easy to meet needed to offer aftermarket services aligned with GxP guidelines.

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