**Ideas for On-Boarding a New Sales Employee**

1. Appropriate new employee paperwork including non-compete agreement
2. Sales compliance
3. Explanation of billing
   1. ICD-10 codes
   2. CPT codes
   3. In-network vs. out-of-network insurance (incl. examples)
   4. Balance billing
   5. Sole-source lab contracts
   6. EoB, (deductibles, co-pay, lab charge, insurance allowed, patient responsibility, etc.)
   7. Self-pay policy
   8. Write-off policy
   9. Billing cycle (i.e., patient bill dunning notice policy)
   10. Medicare/Medicaid EoB, plus explain secondary coverage
   11. Difference between client vs. insurance billing
   12. Discount policy for client billing
   13. ABN explanation
4. Connectivity
   1. EMR interface (bi- and uni-directional)
   2. Lab portal
   3. Requisition form
   4. Result retrieval
5. Client Relationship Management tool
   1. Company policy: timing of CRM notations (e.g., daily) or handwritten

**New Sales Employee On-Boarding – P. 2**

1. Logistics
   1. Courier pick-up times; approximate time they return to lab
   2. Situation-dependent: overnight logistics, paperwork, etc.
2. Lab Operations: each department (test turnaround times, common methodology names, acronyms, production schedule)
   1. Routine chemistries, hematology, UA, PSA, etc.
   2. Molecular tests (CT/GC, COVID, etc.)
   3. (Toxicology screen and confirmation)
   4. Disease/health Panels
   5. Requisition form explanation (incl. ABN)
3. (if possible) Meet professional staff in charge of departments
4. Client Services Department responsibilities
5. Top 10 send-out tests
6. Routine client supplies (anything else requires pre-approval)
7. If state permits: Phlebotomy/processor support (internal & external required paperwork)
8. Expectations for servicing accounts (distribute business cards to everyone)
   1. Build rapport with key contact person(s) that prepares send-outs
   2. Introduce yourself to medical assistants
   3. Build rapport with office manager and providers
   4. Visitation schedule depends on test volume or dollar volume or client “neediness”
   5. Distribute journal abstracts, lab announcements, CMS announcements, Choosing Wisely, etc.
   6. Rapidly handle client issues — follow-up with client to ensure satisfaction
9. Expectations for field productivity
   1. Balance prospective calls with servicing current customer calls
   2. Aim for *effectiveness* in sales calls—client *actions* vs. “howdy” calls
   3. For new accounts, get client agreement for start date—and then return on that date to ensure smooth start
10. Expectation of average new monthly dollar amount (Rule of 78)
11. What triggers probation/termination

**New Sales Employee – P. 3**

1. Review of compensation plan
2. Presenter manual
   1. Sample reports
   2. Sample bill
   3. Insurance company list
   4. PSC list
   5. Supply order form
   6. Requisition form
   7. Samples of lab announcements/literature, journal abstract, gov’t announcement, USPSTF
3. Work attire expectation
4. Organization of company literature in the car
5. Computer reports provided to reps (e.g., client test mix, dollar volume, etc.)
6. Company expense report/allowable expenses
7. Review of marketing material – how to effectively explain each piece
8. Physician specialty names (GP/I.M., GI, hem/onc, inf. disease, OB/Gyn, fertility, cardiology, urology, endocrinology, pain management, etc.) *including* common tests ordered by each
9. Sales training in strategy and tactics

**Note**:

Some labs require reps to (a) ride with a courier that covers the rep’s territory, (b) sit with a lab accessioner to see how they accession specimens into the LIS, (c) spend time observing a client service person, (d) spend some time observing a billing person.