



Sample Medical Device 30/60/90 Day Plan

OBJECTIVE OF THE POSITION:

Bring the Iowa and Nebraska territory of the “Medical Products Company” Urology Division to the status of #1 revenue producer in the United States.

My philosophy would be to run this territory as a self-contained business within a business. In doing so, expectations would be set and results tracked. As with other business owners, “Medical Products Company” should seek to maximize their return on investment from this territory or business.

IMPORTANT NOTICE OF DISCLOSURE:

This outline is designed to stimulate a discussion about business practices that will result in success. This outline is not a finished product but rather a work in progress. More exact information is necessary to prepare a formal business plan.

OVERVIEW:

- Strategic Plan
- Tactical Plan
- 30/60/90 Day Plan
- Sales Process
- Goals – Short & Long Term



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STRATEGIC PLAN:

Strategic plan includes steps to accomplish overall objective of the business, to bring territory to #1 revenue producer. Highlights to this strategic plan would include:

1. Success breeds confidence. Confidence aids further success. Identify “low hanging fruit”. Convert these to customers as quickly as possible.
2. Existing customers will be contacted and new relationships will be forged. During this process any old business issues must be rectified directly. Start developing 80/20 rule.
3. Start up new customer marketing efforts. Coordinate weekly marketing activities. Market to all call points within the hospital, physicians and administration.
4. After the implementation of the tactical plan has begun, then a reassessment must be cast. This reassessment must consider new information pertinent to the effort. Refine plan to better achieve the strategic plan objective.

TACTICAL PLAN:

1. Low Hanging Fruit
 - Identify “low hanging fruit” from current account database; revise most recent activity by previous representative.
 - Determine best approach for each prospect.
 - Establish contact with each prospect determined to be “low hanging”, verify and validate interest level.
 - Close business (quickly).
 - Form relationships within this process.



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2. Existing Customers (E.C.)

- Identify E.C. from current customer database.
- Prioritize E.C.'s by amount of revenue potential.
- Schedule onsite appointments with each E.C., starting with those having the highest revenue potential.
- Identify and establish contact with multi-level call points within hospital.

-This is critical to understanding the dynamics of the territory.

-Build relationships through entertaining, dinner programs, etc.

- Determine any opportunities for all product lines with each E.C.; plan to convert into pipeline business in order to expand product offering.
- Conduct product evaluations for each identified opportunity.
- Leverage relationships to identify and win business at other facilities (if applicable).
- Close business.

3. New Customer (N.C)

- Identify new clients from targeting data.
- Prioritize N.C's by revenue potential.
- Schedule on-site appointments with each N.C., starting with highest revenue potential.
- Identify and establish contact with multi-level call point within each N.C. hospital (critical).
- Establish and expand relationships for all call points (entertaining, etc.).
- Determine opportunities for all product lines.
- Conduct product evaluations.
- Leverage relationships to identify and win business at other facilities.
- Close business.



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4. Evaluate and Adjust

- Review progress in conjunction with 30/60/90 plan every 30 days.
- Identify successes in plan and areas needing adjustment.
- Make adjustments, extend plan to next 30 days.
- Review sales process and make any needed adjustments.

30/60/90 Day Timeline:

0-30 Days

- Acquire product expertise.
- Identify most important relationships in territory; introduce myself to establish relationships quickly.
- Close “low hanging fruit” business.
- Identify and prioritize existing and new customers.
- Begin contacting new and existing customers.
- Identify opportunities with existing customers.
- Evaluate and adjust business plan.

30-60 Days

- Clean up any “low hanging fruit” business not closed within first 30 days.
- Continued contact with existing customers.
- Begin closing business with existing customers.
- Identify opportunities with new customers.
- Begin relationship development.
- Evaluate and adjust business plan.



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60-90 Days

- Close business with new customers.
- Begin leveraging existing customer relationships to identify other opportunities.
- Continue relationship development.
- Evaluate and adjust business plan.

SALES PROCESS: (S.T.A.R.)

1. Learn prospects business. (**S**ituation)
2. Identify opportunities for customers' business practices. (**T**hought process)
3. Align customers' needs with solutions and illustrate how my solutions solve their needs. (**A**ction)
4. Close business. (**R**esult)

GOALS:

Short-term

- ❖ Elevate Iowa and Nebraska Territory to top producing territory in company for Urology Division.
- ❖ Become top producer in company.

Long-term

- ❖ Through proven performance, earn promotion/professional growth within the company.



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30 DAY SALES PLAN

OBJECTIVES

1. Understand Sales Manager expectations including short and long term objectives
2. Transition with Sales Representative who had previous account responsibility
3. Build relationships with current customers

TACTICS

1. Meet with Sales Manager

Discuss expectations (30, 60, 90 days, 6 months)

Review policies and procedures

Discuss and review expense budget and administrative responsibilities

Begin building a sales plan including short and long term objectives

2. Transition with Sales Representative who had previous account responsibility

Understand customer base and potential new clients

Identify/manage any urgent issues

Spend a day(s) in field

3. Build relationships with current customers

Meet territory “champions” and begin building relationship

Understand each customer’s needs and expectations

Identify customer service opportunities and fulfill them

Introduce new product information to established customers



60 DAY SALES PLAN

OBJECTIVE

1. Gain more in-depth knowledge of sales territory and the competition
2. Continue to strengthen relationships with key customers
3. Fine tune territory sales plan for balance of year

TACTICS

1. To gain more in-depth knowledge of sales territory and competition.

Which customers are currently using competitors products? Why?

Where are my largest sales opportunities?

Who are the key decision-makers?

Understand politics and organizational structure in each account.

Fully understand competitive products (perceived features & benefits) and Sales Representatives strengths and weaknesses.

2. Strengthen relationships with key customers

Build rapport and trust through quality customer service

Add value by providing client with new product info. and training

Plan key customer entertainment events

Develop “competitive user” hit list and strategize for conversion

3. Fine tune territory sales plan for balance of year

Create action plans for top priority sales objectives that will lead to forecast attainment.

Develop weekly/monthly personal objectives that will impact ability to exceed forecast objectives.

Stay focused on sales plan



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90 DAY SALES PLAN

Training

Product Knowledge

- Institute a vigorous program of self education to learn “Medical Products Company” product line and pricing systems
- Become familiar and network with “Medical Products Company” product specialists for referral purposes.

Sales Strategies

- Learn “Medical Products Company” sales process including methods of presentation, closing and billing.

Clientele

- Qualify clientele within the territory.
- Identify and establish contact with prospective and existing customers to develop and maintain relationships with key decision makers.
- Continue service excellence through reliability and availability.
- Understand customer needs and product implementation potential.

Competitors

- Identify and learn about local and national competing products advantages and disadvantages and surpass each with value added selling.

Prospecting

Appointments

- 3-5 qualified appointments per day
- 5 customer calls per day
- 15-20 cold/referral/lead follow-up calls to set appointments each day
- References from current customers



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Customer Relations

- Maintain efficient record of customers and prospects using available tools. (Act/Microsoft Office/etc.)
- Keep customers and prospects informed of updates and relevant product changes through direct mail.
- Present additional value added products to existing customer.
- Identify customers who may have outdated equipment
- Call on small, medium and large opportunities to maintain a healthy streamline of prospects.

90 DAY SALES PLAN

Long Term Sales Goals

Quota Achievement

- 125%+ of monthly quota
- Continue prospecting for new customers
- Increase service and product implementation in existing customer base.

Continually update “Medical Products Company” product line knowledge and selling points

Regularly update knowledge of competitors and related products

Ongoing sales training to more effectively close sales and maintain a fresh outlook and approach.