

Insert company logo on top
Right of every page in the slide
deck

30-60-90 Plan

INSERT: Position Name & Geography

For an editable power point version of this 30-60-90 plan that you can use for your job interviews go to:

www.smartmedicalsales.com/resources

Be sure to make the content relevant and do things like change the background and put your own vocabulary and style so it so you make it your own. Canned templates will ensure you get canned rejection letters so be sure to **MAKE IT YOUR OWN!**

Best of luck!

Your Name

Current Role

In this basic slide, write down your current title and geography you cover.

Your Name

Responsibilities

Insert high level bullet points of your current responsibilities. Make it relevant to what you are doing in your current role.

Hiring, Training, Developing, Performance plans, Firing
Coaching, mentoring, focus / vision setting for region
Sales forecasting, capital / disposable forecasting

Regulatory approval strategy and priority setting
New product launch strategy setting and sales training
Clinical execution strategy to ensure long term adoption
KOL development and management for market development

Profitability forecasting, expense management, local budget setting
Quota achievement responsibility

Your Name

Achievements

(INSERT YOUR STATS & TOTAL REVENUE AT END \$)

2014 – 103 % quota achievement, 7% revenue growth (\$X)

2013 – 230% quota achievement, 10% revenue growth (\$X)

2012 – 100% quota achievement, 23% revenue growth (\$X)

Low customer turnover

Track record of quota achievement

Sales Rep of the year award 2014

Your Name

My Strengths

From Gallup & Strengths Finder 2.0 Test (2014)

- * **Activator** - People who are especially talented in the Activator theme can make things happen by turning thoughts into action. They are often impatient.
- * **Positivity** - People who are especially talented in the Positivity theme have an enthusiasm that is contagious. They are upbeat and can get others excited about what they are going to do.
- * **Achiever** - People who are especially talented in the Achiever theme have a great deal of stamina and work hard. They take great satisfaction from being busy and productive.
- * **Learner** - People who are especially talented in the Learner theme have a great desire to learn and want to continuously improve. In particular, the process of learning, rather than the outcome, excites them.
- * **Input** - People who are especially talented in the Input theme have a craving to know more. Often they like to collect and archive all kinds of information.

Your Name

Why: My Top 3

1. Successful “People Manager” with high achievement track record – Mentor, Coach, Leader, Tone/Focus / Vision setter
2. My personal / professional strengths are an excellent fit – Turning thoughts into action, contagiously enthusiastic, hard / smart working achiever, continuous improver, metric focused growth
3. Analytical & Financial Acumen – experienced setting and maintaining within budget, sales forecasting, set forecasting, expense report management, profit projections, contract negotiations

Your Name

Top 3 Reasons for Change

- ✓ I am looking to contribute to the growth of a local team with an innovative device portfolio
- ✓ I would like to focus on regional growth opportunities and wind down international travel (currently 75-85%, would be ok with 50-65% regional travel)
- ✓ It is a must to join a group with excellent leadership / management team where I can continue to contribute and grow personally and professionally

Your Name

High Level Start-up Objectives

Exceed Quota Yearly

Maintain Sales Engagement

Deliver budget commitment

Exceed profitability projections

Your Name

High level Start-up Objectives

- ✓ Familiarize with Sales Leadership and QBRs to align strategy
- ✓ Familiarize with sales representatives in territory
- ✓ Identify business processes
- ✓ Familiarize with current plans in place and work flow
- ✓ Ensure thorough knowledge of (INSERT PRODUCT NAMES HERE)
- ✓ Secure knowledge of (INSERT PRODUCT NAMES HERE) to a point of complete confidence in representing the lines and completely understanding administrative functions and procedures including company protocol
- ✓ Meet with capital and disposable sales teams and explore the daily regiment of what is the most effective time management to properly ensure success and partnership with them
- ✓ Research and recognize who is the competition and begin to determine strengths and weaknesses of both internal and external sales management environment
- ✓ After 3 weeks observation begin organizing and revising plan for the upcoming month as necessary

Your Name

30 – 60 - 90 Day Plan Execution

A framework managers, peers and stakeholders that facilitates:

- ✓ Assessment of current state of (INSERT COMPANY, DIVISION) business in (INSERT GEOGRAPHY NAME): Sustain, Turnaround, Realign, Start-up
- ✓ Accelerated learning: Climb the organizational & geographic learning curve quickly through a programmatic approach
- ✓ Alignment of strategy to situation through input:
 - ✓ **People:** Understand the team; perceptions of key stakeholders, identify quick wins and assemble a plan to build and motivate a high performing team based on the current state.
 - ✓ **Customers:** Understand (INSERT COMPANY NAME) customer lifecycle, build a plan to deliver the most rewarding engagement and highest satisfaction.
 - ✓ **Territory Operations:** Identify current execution strategy, possible challenges, seek quick improvement wins and what is needed to get the most efficient and predictable flow state.
 - ✓ **Growth Plan:** Understand existing strategy and plans, evolve or build a multi-year plan that spans individual contributors on team to drive (INSERT COMPANY NAME) in (TERRITORY)
 - ✓ **Execution of plan:** Full stakeholder review at 30, 60, 90 days to achieve ongoing insight and alignment (My team and also with Leadership team)

Your Name

People

Goal: Become comfortable with the business and start adding value to customers and increasing sales. Seek quick wins.

30/60

Introduction to business.

- ✓ All hands introduction
- ✓ Field tour: 1:1 introduction / Q&A with each team member & departing leader to seek direct feedback, get the pulse of the team: morale, common themes (positive & negative), sense of urgency, speed of cultural change.
- ✓ Meetings to begin building trust and to seek input

Identify key relationships within (COMPANY) organization (marketing, finance, distribution, contracts, other divisions)

- ✓ Organize networking 1:1s across organization if possible (90 day timeline)

Assessment of existing communications at (COMPANY) and culture to facilitate interactions and results

- ✓ Example: Monday morning mail, weekly/quarterly calls, field announcements, etc)

Review existing rewards (ie. Compensation, incentives) and recognition (ie. Celebrating wins, birthdays) systems/ culture

Engage manager and departing sales rep for full review if still at the company:

- ✓ Existing budgets, training programs, performance tools, new hire on-boarding, mentor programs.
- ✓ Current state review of top & bottom (identify high performers / high potentials and performance issues) and review how Covidien measures work health (management feedback, employee opinion polls)

90

Formalize a high performing territory sales plan

- ✓ Implementation of key Performance activities
- ✓ Understand team rhythm and gather as much feedback as possible
- ✓ Identification of changes that will lead to the highest performing territory while delivering momentum building wins

Your Name

Customers

Goal: Understand how (COMPANY) engages customers at each stage – seek quick wins

30/60

Understand how (COMPANY) Views customer engagement

- ✓ Sales force: Sales stage process, market segmentation, organizational structure, cross team collaboration with the customer (marketing, partner organizations COMPANY), communication model (ie. The lifecycle of customer communication such as Device updates / upgrades)
- ✓ Marketing: Planning, field engagement model, measurement, communication model, execution
- ✓ Product development & evolution: Customer feedback stages, implementation assessment and modeling (ie. Need for KOL's in our region to contribute on clinical trials, process for execution)
- ✓ Operations: Identify customer triggers (ie. Satisfaction survey, end of contract or utilization flags or other processes to help retain / upgrade and create loyalty).
- ✓ Understand support processes (identification, understanding, resolution)

Review customer satisfaction strategy

- ✓ Measurement and tracking, competitive positioning, sales force compensation, execution, feedback mechanisms (Perhaps feedback@COMPANY.com) and field plans (individual contributor, regional sales manager)

Understand customer value proposition by segment (value proposition, differentiators, pitch by segment) and expand network

- ✓ Quickly execute a range of customer meetings (dissatisfied, satisfied) to gather first hand feedback.
- ✓ Leverage relationships to quickly expand
- ✓ Seek key leverage opportunities

90

Formalize strategy to drive the highest levels of satisfaction

- ✓ Implementation of key customer themes
- ✓ Review / implement operational rhythm to review customer satisfaction based on key triggers
- ✓ Customer plan: Leverage outputs of first 60 days to continue / evolve the customer strategy and clearly communicate across the business

Your Name

Territory Operations

Goal: Understand (INSERT COMPANY) business rhythm, levels of automation, flexibility and current state while building momentum.

30/60

Review current state of the business

- ✓ Achievement against budgets (multi-year), action plans, trends and appropriate operational data.

Review sales planning process

- ✓ Territory growth planning, market segmentation, goal setting

Review current operational reporting model and metrics:

- ✓ What metrics does (COMPANY) use to measure success? Customer satisfaction, product reporting, revenue, margin, share, scorecard use / implementation.
- ✓ Understand budgeting model (Regional P&L, quarterly operational budgets, etc) and flexibility
- ✓ Understand operational rhythm
- ✓ Forecasting and metrics review (daily-weekly-monthly- by level?)
- ✓ Business and growth plan review with my manager

90

Review sales support infrastructure

- ✓ Sales tools & strategy, what is the plan?

Formalize plan to deliver sales results quickly

- ✓ Highly dependent on operational performance state. Implementation of operational rhythm and structure which provides a single view of business state while maximizing field customer time

Your Name

Growth Plan

Goal: Understand (INSERT COMPANY & DIVISION NAME) existing growth strategy, stakeholder strategies while identifying quick wins

30/60

Review existing strategy and growth with manager and peers

- ✓ Territory plans, previous sales rep growth plan, manager growth plan, organization's growth plan
- ✓ What are the key changes to differentiate and beat market expectations / trends?

Review rhythms for planning and strategy

- ✓ Budget setting, market assessment phases, capital planning

Review key stakeholder strategies

- ✓ Marketing, finance, contracts, other divisions input on existing business strategy

Review key external inputs and market opportunity

- ✓ Assessments, market reviews, industry data that would affect my territory

Identify mechanisms for team input into evolving strategy

- ✓ Vision setting exercises, central input, leverage high performers to learn quickly

90

Clear timeline to building a multi-year quota achieving territory plan that supports and enhances the U.S. / Global plan

Support or build a process to create reproducible results within 6 months of starting

Identify best way to articulate vision – strategy plan; achieve customer and team support for the brand and vision of the company

Identify best way to track and communicate plan

Your Name

Personal Integration Plan

Goal: Quickly integrate into the (INSERT COMPANY NAME) corporate culture and build local knowledge / network

Quick ramp through structured integration into the business (90 day plan)

- ✓ Active field knowledge gathering from manager and peers (1:1s)
- ✓ Regular business, strategy reviews with VPs & key stakeholders
- ✓ Personal development review and coaching

Leverage industry and personal / professional network to integrate

- ✓ Leverage current relationships with physicians and vendors within my region's network

Learning plan

- ✓ Seek stakeholder input to quickly build a structured learning plan that facilitates integration
- ✓ Local mentorship
- ✓ Development program within (COMPANY)?

Your Name

Thank you!

“People don’t plan to fail, they fail to plan” Take the time to bring your preparation level high and do the basics better than anyone else and you won’t need luck to succeed. Looking forward to your success!

I look forward to our interview (insert date) at the (Insert location). Please feel free to reach out with any questions or last minute changes.

I will bring a printed copy of these materials to our meeting for additional discussion.

Your Name
youremail@yourdomain.com
Phone number

Your Name