AGENCY
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HOW TO
guide.

Healthcare sales *playbook template.*

Great healthcare innovations don't advance healthcare if people *don't know about them.*

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TEMPLATE

Product/Service:
[Enter product or service name]

Created by:
[Team/Individual name]

Date:
[Date]

Version:
[Version number]

EXECUTIVE SUMMARY

Sales Strategy Overview

[2-3 sentence description of your overall sales approach and how it aligns with business objectives]

Target Market Summary

[Brief description of your primary market and key customer segments]

Key Value Proposition

[Your main value proposition for prospects in 1-2 sentences]

Sales Performance Goals

[Primary sales objectives and targets for this period]

01

SECTION

Company *information.*

1.1 COMPANY STRATEGY

Mission Statement:
[Your company's mission statement that guides all sales and marketing activities]

Vision Statement:
[Your company's long-term vision and aspirations]

Core Values:
[List 3-5 core values that define your company culture]

Strategic Objectives:
[Key business objectives that sales activities support]

1.2 SALES TEAM STRUCTURE

Sales Organisation Chart: [Include organisational chart showing reporting relationships]

INDIVIDUAL ROLES AND RESPONSIBILITIES:

Role/Title	Key Responsibilities	Quota/Targets	Performance Metrics
[Role 1]	[List responsibilities]	[Quota details]	[How measured]
[Role 2]	[List responsibilities]	[Quota details]	[How measured]
[Role 3]	[List responsibilities]	[Quota details]	[How measured]

Territory Assignments: [How territories are divided and assigned]

1.3 HOW SALES SUPPORTS COMPANY STRATEGY

[Explain how the sales team's activities directly contribute to overall business success]

02

SECTION

Products *and pricing.*

2.1 PRODUCT PORTFOLIO OVERVIEW

Product/Service 1:

- **What it is:** [Technical description]
- **How it works:** [Functional explanation]
- **What it does:** [Benefits and outcomes]
- **Why buyers should care:** [Value proposition]
- **Target users:** [Primary users/decision makers]

Product/Service 2:

- **What it is:** [Technical description]
- **How it works:** [Functional explanation]
- **What it does:** [Benefits and outcomes]
- **Why buyers should care:** [Value proposition]
- **Target users:** [Primary users/decision makers]

[Add additional products as needed]

2.2 COMPETITIVE POSITIONING

Feature/Benefit	Our Solution	Competitor 1	Competitor 2	Our Advantage
[Feature 1]	[Our approach]	[Their approach]	[Their approach]	[Why we're better]
[Feature 2]	[Our approach]	[Their approach]	[Their approach]	[Why we're better]
[Feature 3]	[Our approach]	[Their approach]	[Their approach]	[Why we're better]

2.3 PRICING STRUCTURE

Pricing Model: [Subscription/One-time/Usage-based/etc.]

PRICING TIERS:

Tier/Package	Price	Features Included	Target Customer
[Tier 1]	[Price]	[Feature list]	[Customer type]
[Tier 2]	[Price]	[Feature list]	[Customer type]
[Tier 3]	[Price]	[Feature list]	[Customer type]

Pricing Guidelines: **Standard Pricing:** [When to use list prices]
Discount Authority: [Who can approve discounts and at what levels]
Negotiation Parameters: [Acceptable negotiation ranges]

03

SECTION

Target *personas.*

3.1 PRIMARY PERSONA: [PERSONA NAME]

Professional Information:

- **Job Title:** [Specific role]
- **Department:** [Department/function]
- **Organisation Type:** [Type and size]
- **Role in Buying Process:** [Decision maker/Influencer/Gatekeeper]
- **Typical Responsibilities:** [Daily responsibilities]
- **Success Metrics:** [How they're measured]
- **Tools They Use:** [Technology/systems]

Goals and Motivations:

- **Primary Goals:** [What they're trying to achieve]
- **Career Aspirations:** [Professional objectives]
- **Key Values:** [What drives them]

Pain Points and Challenges:

1. [Primary pain point that drives purchasing]
2. [Secondary challenge]
3. [Tertiary frustration]

Information Behaviours:

- **Information Sources:** [Where they research solutions]
- **Trusted Influencers:** [Who influences their decisions]
- **Communication Preferences:** [Email/Phone/In-person/etc.]
- **Social Media Usage:** [Platforms they use professionally]

Buying Process:

- **Decision Timeline:** [How long decisions typically take]
- **Budget Authority:** [Budget influence level]
- **Approval Process:** [Steps in their buying process]

3.2 SECONDARY PERSONA: [PERSONA NAME]

[Repeat structure above for additional personas]

3.3 INFLUENCER MAPPING

Stakeholder	Influence Level	Primary Concerns	How to Engage
[Stakeholder 1]	[High/Medium/Low]	[Key concerns]	[Engagement strategy]
[Stakeholder 2]	[High/Medium/Low]	[Key concerns]	[Engagement strategy]
[Stakeholder 3]	[High/Medium/Low]	[Key concerns]	[Engagement strategy]

04

SECTION

Messaging.

4.1 CORE VALUE PROPOSITIONS

Universal Value Proposition:
[Your main value proposition that resonates across all personas]

Persona-Specific Value Propositions:

For [Persona 1]: [Tailored value proposition addressing their specific needs]

For [Persona 2]: [Tailored value proposition addressing their specific needs]

4.2 KEY MESSAGES BY SALES STAGE

Sales Stage	Key Message	Supporting Points	Proof Points
Prospecting	[Message]	[2-3 supporting points]	[Evidence/data]
Discovery	[Message]	[2-3 supporting points]	[Evidence/data]
Presentation	[Message]	[2-3 supporting points]	[Evidence/data]
Proposal	[Message]	[2-3 supporting points]	[Evidence/data]
Negotiation	[Message]	[2-3 supporting points]	[Evidence/data]
Closing	[Message]	[2-3 supporting points]	[Evidence/data]

4.3 OBJECTION HANDLING

Common Objection 1: [Objection]

- **Root Cause:** [Why they object]
- **Response Strategy:** [How to address]
- **Supporting Evidence:** [Proof points to use]
- **Follow-up Questions:** [Questions to ask]

Common Objection 2: [Objection]

- **Root Cause:** [Why they object]
- **Response Strategy:** [How to address]
- **Supporting Evidence:** [Proof points to use]
- **Follow-up Questions:** [Questions to ask]

4.4 TALK TRACKS AND SCRIPTS

Cold Outreach Script: [Voicemail/email template for initial contact]

Discovery Questions: [Key questions to uncover needs and qualify opportunities]

Value Presentation Framework: [Structure for presenting value propositions]

Closing Techniques: [Approved methods for asking for the business]

05

SECTION

Sales *methodology.*

5.1 CHOSEN SALES METHODOLOGY

Primary Methodology: [SPIN/Consultative/Challenger/Solution Selling/etc.]

Why This Methodology: [Explanation of why this approach fits your market and customers]

How It Aligns with Company Goals: [Connection to broader business objectives]

5.2 METHODOLOGY IMPLEMENTATION

Discovery Phase:

- **Objective:** [What you're trying to learn]
- **Key Activities:** [Specific actions to take]
- **Questions to Ask:** [Methodology-specific questions]
- **Success Criteria:** [How you know you're ready to move forward]

Qualification Framework:

- **Qualification Criteria:** [BANT/MEDDIC/etc. criteria]
- **Required Information:** [Must-have data points]
- **Go/No-Go Decision Process:** [When to continue/stop pursuing]

Solution Development:

- **Needs Analysis Process:** [How to analyse requirements]
- **Solution Mapping:** [How to match solutions to needs]
- **Stakeholder Alignment:** [How to ensure all stakeholders agree]

06

SECTION

Customer *journey.*

6.1 BUYER'S JOURNEY MAPPING

Awareness Stage:

- **Buyer Mindset:** [What they're thinking/feeling]
- **Information Needs:** [What they're researching]
- **Sales Approach:** [How to engage]
- **Content/Resources:** [What to share]
- **Success Metrics:** [How to measure progress]

Consideration Stage:

- **Buyer Mindset:** [What they're thinking/feeling]
- **Information Needs:** [What they're researching]
- **Sales Approach:** [How to engage]
- **Content/Resources:** [What to share]
- **Success Metrics:** [How to measure progress]

Decision Stage:

- **Buyer Mindset:** [What they're thinking/feeling]
- **Information Needs:** [What they're researching]
- **Sales Approach:** [How to engage]
- **Content/Resources:** [What to share]
- **Success Metrics:** [How to measure progress]

6.2 TOUCHPOINT STRATEGY

Customer Stage	Touchpoint	Purpose	Frequency	Owner
[Stage]	[Touchpoint type]	[Objective]	[How often]	[Responsible role]

6.3 POST-SALE JOURNEY

Implementation Process: [Steps for successful product implementation]

Onboarding Support: [How to ensure customer success]

Ongoing Relationship Management: [Strategy for account growth and retention]

07

SECTION

Sales *process.*

7.1 SALES PROCESS OVERVIEW

Stage 1: Prospecting

- **Objective:** [Goal of this stage]
- **Key Activities:** [What sales reps do]
- **Duration:** [Typical timeframe]
- **Exit Criteria:** [Requirements to advance]
- **Tools/Resources:** [What to use]

Stage 2: Discovery

- **Objective:** [Goal of this stage]
- **Key Activities:** [What sales reps do]
- **Duration:** [Typical timeframe]
- **Exit Criteria:** [Requirements to advance]
- **Tools/Resources:** [What to use]

Stage 3: Qualification

- **Objective:** [Goal of this stage]
- **Key Activities:** [What sales reps do]
- **Duration:** [Typical timeframe]
- **Exit Criteria:** [Requirements to advance]
- **Tools/Resources:** [What to use]

Stage 4: Presentation

- **Objective:** [Goal of this stage]
- **Key Activities:** [What sales reps do]
- **Duration:** [Typical timeframe]
- **Exit Criteria:** [Requirements to advance]
- **Tools/Resources:** [What to use]

Stage 5: Proposal

- **Objective:** [Goal of this stage]
- **Key Activities:** [What sales reps do]
- **Duration:** [Typical timeframe]
- **Exit Criteria:** [Requirements to advance]
- **Tools/Resources:** [What to use]

Stage 6: Negotiation

- **Objective:** [Goal of this stage]
- **Key Activities:** [What sales reps do]
- **Duration:** [Typical timeframe]
- **Exit Criteria:** [Requirements to advance]
- **Tools/Resources:** [What to use]

Stage 7: Closing

- **Objective:** [Goal of this stage]
- **Key Activities:** [What sales reps do]
- **Duration:** [Typical timeframe]
- **Exit Criteria:** [Requirements to advance]
- **Tools/Resources:** [What to use]

7.2 STAGE-SPECIFIC GUIDELINES

Prospecting Best Practices: [Specific guidance for effective prospecting]

Discovery Best Practices: [Specific guidance for effective discovery]

Presentation Best Practices: [Specific guidance for effective presentations]

Closing Best Practices: [Specific guidance for effective closing]

SECTION 08

Resources.

8.1 EXTERNAL-FACING RESOURCES

FOR PROSPECTS/CUSTOMERS:

Educational Content:

- [ ] **White papers:** [List titles and use cases]
- [ ] **Case studies:** [List available case studies]
- [ ] **Blog posts:** [Key articles to share]
- [ ] **Research reports:** [Industry studies]
- [ ] **Webinars:** [Educational sessions]

Sales Support Materials:

- [ ] **Product datasheets:** [Technical specifications]
- [ ] **Solution briefs:** [Use case descriptions]
- [ ] **ROI calculators:** [Value demonstration tools]
- [ ] **Demo scripts:** [Demonstration guidelines]
- [ ] **Reference letters:** [Customer testimonials]

8.2 INTERNAL RESOURCES

SALES ENABLEMENT MATERIALS:

Sales Enablement Materials:

- [ ] **Product training modules**
- [ ] **Sales methodology training**
- [ ] **Competitive intelligence**
- [ ] **Industry knowledge base**
- [ ] **Regulatory compliance training**

Sales Tools:

- [ ] **Battle cards:** [Competitive positioning]
- [ ] **Presentation templates:** [Standard deck formats]
- [ ] **Proposal templates:** [Standardised proposals]
- [ ] **Email templates:** [Outreach templates]
- [ ] **Objection handling guides**

Research and Intelligence:

- [ ] **Market research reports**
- [ ] **Competitive analysis**
- [ ] **Industry trend reports**
- [ ] **Customer feedback summaries**
- [ ] **Win/loss analysis**

8.3 RESOURCE ORGANISATION

Where to Find Resources: [Location of sales resources - CRM/shared drive/portal]

Resource Requests: [Process for requesting new materials or updates]

Resource Updates: [How resources are maintained and updated]

09

SECTION

Sales technology *and tools.*

9.1 CORE TECHNOLOGY STACK

Customer Relationship Management (CRM):

- **Platform:** [CRM system name]
- **Primary Functions:** [Key features used]
- **User Guidelines:** [How to use effectively]
- **Data Input Requirements:** [Required fields and standards]

Sales Automation Tools:

- **Platform:** [Tool name]
- **Primary Functions:** [Key features used]
- **User Guidelines:** [How to use effectively]
- **Best Practices:** [Optimisation tips]

Communication Tools:

- **Platform:** [Tool name]
- **Primary Functions:** [Key features used]
- **User Guidelines:** [How to use effectively]
- **Integration:** [How it connects to other tools]

9.2 TOOL USAGE BY SALES STAGE

Sales Stage	Primary Tools	Key Features to Use	Data to Capture
Prospecting	[Tools]	[Features]	[Data points]
Discovery	[Tools]	[Features]	[Data points]
Presentation	[Tools]	[Features]	[Data points]
Proposal	[Tools]	[Features]	[Data points]
Closing	[Tools]	[Features]	[Data points]

9.3 DATA MANAGEMENT STANDARDS

Where to Find Resources: [Location of sales resources - CRM/shared drive/portal]

Resource Requests: [Process for requesting new materials or updates]

Resource Updates: [How resources are maintained and updated]

10 SECTION

Key Performance Indicators *(KPIs).*

10.1 INDIVIDUAL SALES METRICS

Revenue Metrics:

- **Annual Quota:** [Individual sales target]
- **Quarterly Targets:** [Quarterly breakdown]
- **Monthly Goals:** [Monthly expectations]
- **Average Deal Size:** [Target deal value]
- **Win Rate:** [Expected close rate]

Activity Metrics:

- **Prospecting Activities:** [Calls/emails per day]
- **Discovery Meetings:** [Meetings per week]
- **Proposals Submitted:** [Proposals per month]
- **Pipeline Velocity:** [Average sales cycle length]

Quality Metrics:

- **Lead Conversion Rate:** [Lead to opportunity %]
- **Opportunity Conversion Rate:** [Opportunity to close %]
- **Customer Satisfaction Score:** [Post-sale satisfaction rating]
- **Reference Generation:** [Customer advocacy metrics]

10.2 TEAM/COMPANY METRICS

Team Performance:

- **Total Team Revenue:** [Team quota]
- **Market Share Growth:** [Growth targets]
- **New Customer Acquisition:** [New logos per quarter]
- **Customer Retention Rate:** [Retention percentage]

Leading Indicators:

- **Pipeline Coverage:** [Pipeline multiple of quota]
- **Activity Levels:** [Team activity standards]
- **Conversion Rates:** [Stage-to-stage conversion]
- **Deal Velocity:** [Average time in each stage]

10.3 PERFORMANCE REVIEW PROCESS

Daily Reviews: [What to track and review daily]

Weekly Reviews: [Weekly performance check process]

Monthly Reviews: [Monthly assessment criteria]

Quarterly Reviews: [Comprehensive quarterly evaluation]

11

SECTION

Ethical practices *and compliance.*

11.1 HEALTHCARE INDUSTRY STANDARDS

Regulatory Compliance:

- **HIPAA Requirements:** [Patient privacy considerations]
- **FDA Regulations:** [Medical device/pharmaceutical regulations]
- **State Licensing:** [Territory-specific requirements]
- **Professional Standards:** [Industry codes of conduct]

Documentation Requirements: [Required documentation for healthcare sales]

11.2 COMPANY CODE OF CONDUCT

Core Principles: [Company ethical principles for sales activities]

Acceptable Practices:

- [List approved sales activities]
- [Gift and entertainment guidelines]
- [Educational event standards]
- [Professional relationship boundaries]

Prohibited Activities:

- [List prohibited behaviours]
- [Anti-kickback compliance]
- [Conflicts of interest]
- [Misrepresentation guidelines]

11.3 COMPLIANCE PROCESS

Training Requirements: [Required compliance training and frequency]

Approval Processes: [What requires pre-approval]

Incident Reporting: [How to report compliance concerns]

Audit Procedures: [Regular compliance review process]

Implementation *plan.*

Immediate Next Steps (Next 7 Days)

- [Action item 1]
- [Action item 2]
- [Action item 3]

Short-Term Actions (Next 30 Days)

- [Action item 1]
- [Action item 2]
- [Action item 3]

Long-Term Actions (Next 90 Days)

- [Action item 1]
- [Action item 2]
- [Action item 3]

SUCCESS METRICS

Metric	Current Baseline	30-Day Goal	90-Day Goal	Measurement Method	Owner
[Metric 1]	[Current state]	[30-day target]	[90-day target]	[How to measure]	[Responsible person]
[Metric 2]	[Current state]	[30-day target]	[90-day target]	[How to measure]	[Responsible person]
[Metric 3]	[Current state]	[30-day target]	[90-day target]	[How to measure]	[Responsible person]

APPROVAL AND REVIEW

Created by: [Name]

Reviewed by: [Name and role]

Approved by: [Name and role]

Date: [Date]

Next Review Date: [Date]

Review Schedule: [How often this playbook will be updated]

This playbook is a living document and should be updated regularly as market conditions, products, and sales strategies evolve.

APPENDICES

Appendix A: Contact Directory [Key contacts and escalation paths]

Appendix B: Territory Information [Territory-specific information and guidelines]

Appendix C: Competitive Intelligence [Detailed competitive analysis and positioning]

Appendix D: Legal and Compliance Resources [Links to compliance documentation and legal resources]

PRODUCT PLAYBOOK TO SALES PLAYBOOK MAPPING

Product Messaging Playbook Section	How They Connect	Sales Playbook Sections	When Used in Sales/Marketing Process
Understanding your market (TAM, Market Segmentation)	Marketing identifies hospital segments by size and specialty; Sales uses this to prioritise territories and account targets	Company Information (Strategy, Mission, Roles, Organisation)	Quarterly territory planning, annual budget allocation, new market entry planning
Defining your customer (Stakeholder Mapping, ICP, CIPSS Analysis, Problem Mapping)	Marketing builds clinical user profiles; Sales transforms these into conversation guides for different roles (e.g., surgeon vs. procurement)	Identify Target Personas	Pre-call planning, account mapping sessions, stakeholder identification before tenders
Defining your product value (Feature Hierarchy/Kano Model, Features and Benefits, Value Proposition)	Marketing creates value statements; Sales translates these into ROI calculators and comparison charts for customer conversations	Products and Pricing	Initial customer presentations, proposal development, pricing discussions, tender responses
Aligning with stakeholders (Stakeholder Benefit Mapping, Benefit, Hierarchy, Value Propositions)	Marketing maps key benefits by stakeholder, Sales uses these to customise pitch decks for different decision-makers	Messaging (Scripts, Objection Handling)	Preparing for multi-stakeholder meetings, overcoming objections during sales process, clinical committee presentations
Regulatory foundation (Claims Matrix	Marketing establishes approved claims with evidence: Sales incorporates these exact phrases into call scripts and proposals	Ethical Practices	Creating sales materials, responding to clinical questions, developing promotional materials, documentation for compliance reviews
Go-to-market strategy (Marketing Positioning, Messaging Matrix)	Marketing develops competitive positioning: Sales operationalises this into step-by-step engagement process and discovery questions	Define Your Sales Methodology. Explain Your Sales Process	Sales training, competitive situations, developing account strategies, qualification discussions
Product storytelling (Origin Story, Vision Design, Mission, Approach, The Why)	Marketing crafts core narratives; Sales personalises these stories with relevant examples for each customer situation	Customer Journey	Opening customer conversations, building emotional connection, post-sale implemantation, training end users, creating customer champions

notes...

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