Breakout Activity

Write down:

- How many active trials do you have?
- How many have an end date?
- How many have a scheduled decision meeting?
- How many are sitting in limbo?

If you closed just 15% of those within 30 days, what would that mean for 2026 revenue?

Trials

1. What percentage of trials convert today?
2. What is the average trial length?
3. How many trials have no defined end date?
4. How often do we define success metrics before starting?
5. Who owns the close after a trial?

Why This Is So Important in Medical Device Sales?

Hospitals and IDNs:

- Are risk-averse
- Require clinical validation
- Involve multiple stakeholders (clinical, supply chain, value analysis, finance)
- Often use trials as a stall tactic

If sales reps lack structure, trials become:

"We'll try it and see."

Instead of:

"We will evaluate this against defined criteria on a defined timeline for a defined outcome."

That difference determines whether they win or drift.

BEFORE the Trial – Qualification & Control

This is where most teams fail. No trial should begin without:

Clear Pain Identified

- What problem are we solving?
- What is the cost of not solving it?
- Who owns the pain?

Decision Process Defined

- Who approves?
- Is Value Analysis required?
- What criteria determine success?

Trial Success Metrics Agreed Upon

- Clinical metrics
- Workflow metrics
- Cost metrics
- Timeline

Start and End Date

Trials without end dates = free product programs.

Up-Front Contract

"If we can demonstrate X during this 30-day evaluation, what would need to happen for us to move forward?"

No answer = no trial.

DURING the Trial – Active Management

Trials are not “drop and hope.”

Sales Reps should:

- Conduct midpoint check-ins
- Reinforce success criteria
- Gather feedback early
- Address objections in real time
- Secure internal champions

If you wait until the end, you've already lost control.

AFTER the Trial – Close or Walk

This is where discipline matters most!

Every trial should end with:

Formal Review Conversation

- Did we meet agreed criteria?
- What worked?
- What didn't?
- What's the next step?

Clear Close Attempt

- Purchase order
- Contract
- Next-level approval
- Expansion plan

Or…

Professional Disqualification

- Not a fit
- Not budgeted
- Political barrier
- Timing issue

What you need to avoid:

"Let's keep using it for a while."

Why This Matters at IZI

- Samples have real cost
- Regulatory exposure exists
- Inventory ties up cash
- Hospitals share information internally
- Purchasing patterns become habitual

If sales reps over-sample:

You commoditize yourself.

If sales reps control trials:

You elevate yourself to strategic partner.

In medical device, a trial is not a favor. It is a structured bridge between pain and commitment.
If we don’t manage it with discipline, we are funding indecision.

“Controlled Trials = Controlled Outcomes”

BEFORE: Define the Win

- Pain confirmed and owned
- Economic or clinical impact identified
- Decision process mapped
- Success metrics agreed in writing
- Start and end date defined
- Clear next step if successful

No criteria + No timeline + No next step = No trial.

DURING: Actively Manage

- Kickoff meeting with stakeholders
- Midpoint check-in scheduled at launch
- Usage monitored
- Objections surfaced early
- Champion reinforced

No silence allowed during trials. Silence = loss of control.

AFTER: Decide or Disqualify

- Formal review meeting
- Success metrics revisited
- Clear close attempt
- PO, contract, expansion… or walk

Avoid: “keep using it.”

TRIAL GREENLIGHT CHECKLIST

Clinical / Operational

- ☐ What problem are we solving?
- ☐ Who feels the pain?
- ☐ What is the cost of staying the same?
- ☐ Is this tied to a current initiative?

Economic

- ☐ Budget identified?
- ☐ Is this replacing something?
- ☐ Who signs off financially?

Process

- ☐ Value Analysis required?
- ☐ How long does approval take?
- ☐ Who could veto this?

Trial Control

- ☐ Defined start date
- ☐ Defined end date
- ☐ Success metrics agreed
- ☐ Post-trial review meeting scheduled BEFORE trial begins

If 3 or more boxes are unchecked… Delay the trial.

Trial Up-Front Contract

Step 1 – Set Frame
"Before we begin a trial, I want to make sure we're aligned so this is valuable for you and fair to both of us."

Step 2 – Define Success
"If during the 30-day evaluation we demonstrate that our device improves _____ and addresses the concerns around _____, what would need to happen next on your end?" (Stay quiet!)

Step 3 – Lock Next Step
"So just to be clear… If the criteria we outlined are met, you'd move this to Value Analysis and begin the purchasing process. Is that accurate?"

Step 4 – Establish Timeline
"Let's put the review meeting on the calendar now so we're not chasing each other at the end."

If they hesitate or won't define next steps:

That is not a trial….
That is a stall….

Track These 6 Metrics Monthly

Track These 6 Metrics Monthly

1. # of active trials
2. % with defined end date
3. % with pre-scheduled review meeting
4. Average trial length
5. Conversion rate (% to purchase)
6. Revenue per converted trial

Healthy Benchmarks in Med Device

- 100% should have end dates
- 100% should have review meetings scheduled in advance
- 60–80% conversion if properly qualified
- 30–45 day average evaluation (depending on product)
- If conversion is below 50%, qualification is weak.

Trials

How Important is this at IZI?

Uncontrolled trials:

- Destroy margin
- Inflate pipeline
- Train hospitals to expect free inventory
- Kill forecasting accuracy
- Encourage price shopping

Disciplined trials:

- Elevate positioning
- Strengthen clinical relationships
- Shorten sales cycles
- Protect ASP
- Improve leadership visibility

At IZI, samples are not marketing tools...

They are strategic investments!

Every trial must have:

- A reason
- An owner
- A deadline
- And a decision (yes or no)

What would happen to our revenue in 2026 if IZI improved trial conversion by just 15%?

The Excited Surgeon

Situation:
A surgeon loves IZI's device and wants to trial it next week.

What the rep says:
"Great, I'll drop off samples Monday."

Your role-play objective:
Rep must slow down and control the trial.

Rep must uncover:

- Is there a current contract?
- Does this require Value Analysis approval?
- What are the measurable success criteria?
- What happens if trial is successful?
- Who besides you must approve?

Winning Behavior:
Rep schedules:

- Trial start date
- Trial end date
- Post-trial decision meeting

The Value Analysis Stall

Situation:
Trial completed. Positive clinical feedback.
Champion says: “I’ll bring it to VAC.”

Reality: VAC is unprepared.

Rep must:

- Ask what criteria VAC uses
- Prepare economic justification
- Arm the champion with data
- Request to attend or submit structured documentation

Teaching Moment:
Clinical enthusiasm ≠ purchasing approval.

The Endless Trial

Situation:
Hospital keeps using product beyond trial period.

Rep hears:
“Let’s just keep using it for a while.”

Rep must respond with discipline:

“Well, we agreed the evaluation would end on March 30 and we’d decide based on the criteria we outlined. Did we meet those benchmarks?”

Silence. Let them answer.

Close or disqualify.

VAC Preparation Template

Clinical Case

- What specific problem are we solving?
- What evidence supports improvement?
- Data from trial?

Operational Impact

- Workflow improvement?
- Training required?
- Implementation risk?

Economic Case

- What are we replacing?
- Cost comparison?
- Reduction in complications?
- Impact on length of stay?

Risk & Compliance

- Regulatory clearance?
- Peer-reviewed validation?
- Other IDNs using it?

Decision Ask

“If approved, what is the expected purchasing pathway?”

VAC

Trial Plan

1. No trial without defined pain
2. No trial without success criteria
3. No trial without start and end date
4. Post-trial decision meeting scheduled before trial begins
5. All trials logged in Salesforce with:
    - Stakeholders mapped
    - Decision pathway identified
    - Expected revenue potential
6. Trials longer than 60 days require review

Samples are strategic assets, not marketing giveaways.

Client:	Date:	KARE:
Reason for Trial?	____ Attraction ____ Confirmation	
Whose idea was Trial?	Selling Team: Buying Team:	
Reasons each team would agree to Trial?	Selling Team: Buying Team:	
What are the specific criteria for success?	Selling Team: Buying Team:	
Next steps if successful	Selling Team: Buying Team:	
What are the specific criteria for failure?	Selling Team: Buying Team:	
Next steps if it fails	Selling Team: Buying Team:	
Who will participate? Senior Leadership involvement?	Selling Team: Buying Team:	
Will you have access to mgmt. & participants for: • Preliminary training? • During Trial? • Debrief after Trial? • Are all the above scheduled? • Are there any special delivery instructions or protocol?	 ____ Yes ____ No ____ Yes ____ No ____ Yes ____ No ____ Yes ____ No ____ Yes ____ No	