

# Prime Surgical

## 2024 Organizational Strategy & Planning

### Objective

Outline the forward looking organizational structure, the resources available for execution within each business unit, and the roles we will each play towards our goals.

### Generalists -> Specialists

Early on within Prime Surgical we maximized for generalists. We needed people who could wear many hats and be able to execute on a wide variety of tasks. The versatility and adaptability of our team was a key factor in our early success. That being said, there are tradeoffs.

The technical specificity and complexity of our products and services has increased substantially, accentuating some of the disadvantages of a generalist approach. Moving forward the aim is to create a more specialized and focused environment. I believe this will increase our effectiveness at large, while allowing you the bandwidth to deepen your technical expertise in your respective areas.

We will begin looking at Zimmer Biomet as a separate Business Unit, which will be run by Clay moving forward. I am still going to be intimately involved in (1) strategy, (2) targeting/opps, (3) pivot meetings, (4) Consistent Calls on Critical Contacts (CCC), (5) dinners & shows, etc. - but will be taking a reduced role in the day to day execution of the business (case coverage).

In doing so, the majority of tasks related to Prime Surgical (Scanlan, LifeNet, Edwards, NDI) will be handled by myself and Dani (for the time being).

### Business Units

#### 1. Zimmer Biomet

Clay and Alanna will lead with the day to day execution of Zimmer Biomet. This includes Case Coverage, Account Management, Implant Logistics, etc.

Dani will be assigned specific projects and processes to overlook that will be defined by Clay, based on need (i.e. Zimmer Biomet Implant Inventory, Tracking, etc.).

Brooke will continue to handle specific administrative tasks related to ZB.

Alex will assist Clay in strategic accounts, strategy and approach for new targets, availability for pivot meetings, and will work with Clay to handle our most important active customers.

Primary Resources:

- Clay
- Alanna

Secondary Resources:

- Alex
- Dani

## **2. Prime Surgical (Scanlan, LifeNet, Edwards, NDI, etc.)**

I will be the primary owner of all things that come through these Manufacturers. Under certain circumstances, I will ask for help from Clay & Alanna on certain projects.

Dani can continue to server as a redundancy in the field initially as we roll this out.

Primary Resources:

- Alex

Secondary Resources:

- Dani
- Clay

## **3. Nursing Administration**

Dani will move her primary roll into Nursing Admin, where the role will allow for a more remote daily function. Blake will continue to run this business unit as he has, with myself being available for strategy and pivot meetings.

Primary Resources:

- Blake
- Dani

Secondary Resources:

- Alex

## Overhead

One benefit we'll gain from this exercise is a true sense of each business unit's profitability. We will be able to see where we are allocating our resources, and where we are making our money. Blake, Clay, and I are heading up each business unit, with the rest of our team serving in varying functions.

**Alanna** - will be the primary resource for Zimmer Biomet, and has a direct compensation plan in place for her active role in ZB. She will be responsible for all things related to the business unit, and will be the primary execution lever for Clay. Alanna will be working deeper into a select few accounts, and in time will develop relationships with the key stakeholders within those hospitals. Where Applicable, Alanna will help Prime Surgical on select projects. Additional incentives will be developed based on the specifics of the project(s).

- *Compensation: The greater of the two: 7,500/mo. OR 8.5%% of the Sales of the Zimmer Biomet North Market*

**Dani** - will be the primary resource for Nursing Admin, and has a direct compensation plan in place for her active role in Nursing Admin. She will be responsible for all things related to the business unit, and will be the primary execution lever for Blake. Dani will be also be overseeing the execution of specified tasks, projects, and processes within the Prime Surgical and Zimmer Biomet business units. Overhead will be assigned to Dani based on the active roles she is playong for each the Prime Surgical and Zimmer Biomet Business Units.

- *Compensation: 3,500/mo from Nursing Admin + 2,000/mo from Prime Surgical Project Management + 1,300 Zimmer Biomet Inventory = 6,800*

**Brooke** - with continue to be the administrative lead for the underlying organization, with many of the tasks filtering up through her for exection. Brooke's overhead will be spread across each business unit according to her level of activity in each.

- *Compensation: 1,900 (600 assigned to Nursing Admin, 700 assigned to Prime, 600 assigned to ZB)*

**Bee** - handled entirely out of the Prime Surgical bucket.

**Fulfillment** - handled entirely out of the Nursing Admin business unit.

## Earnings - Partner Level

**Clay** - will be compensated as a partner, and head of the Zimmer Biomet business unit. Clay will be compensated monthly with 50% of the profitability (Revenue - (Overhead + Expenses)) of the Zimmer

Biomet business unit. Clay will earn an additional 20% of the Prime Surgical profit. Scanlan remains unchanged.

- [Airtable Dashboard Link](#)