

2021 Commercial Kickoff

Cracking the Account Development Code

we are

agiliti.TM

2021 Commercial Kickoff

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AGENDA OVERVIEW

DAY 1

Tuesday, February 23

- 12:00p – 1:00p **General Session Kickoff**
 - Tom L. and Tom B.
- 1:00p – 1:15p **Break**
- 1:15p – 2:45p **Training Session 1**
 - Cracking the Account Development Code
- 2:45p – 4:00p **Break**
- 4:00p – 5:00p **Team Activity**
 - Bingo

DAY 2

Wednesday, February 24

- 9:30a – 10:00a **Day 2 Kickoff**
 - Tom B. and Bettyann
- 10:00a – 10:15a **Break**
- 10:15a – 11:30a **Training Session 2**
 - Cracking the Account Development Code
- 11:30a – 11:45a **Break**
- 11:45a – 1:45p **Workshop**
 - Building Your Winning Sales Plays
- 1:45p – 2:15p **Break**
- 2:15p – 2:45p **Training Session 2**
 - Account Strategies Recap

DAY 3

Thursday, February 25

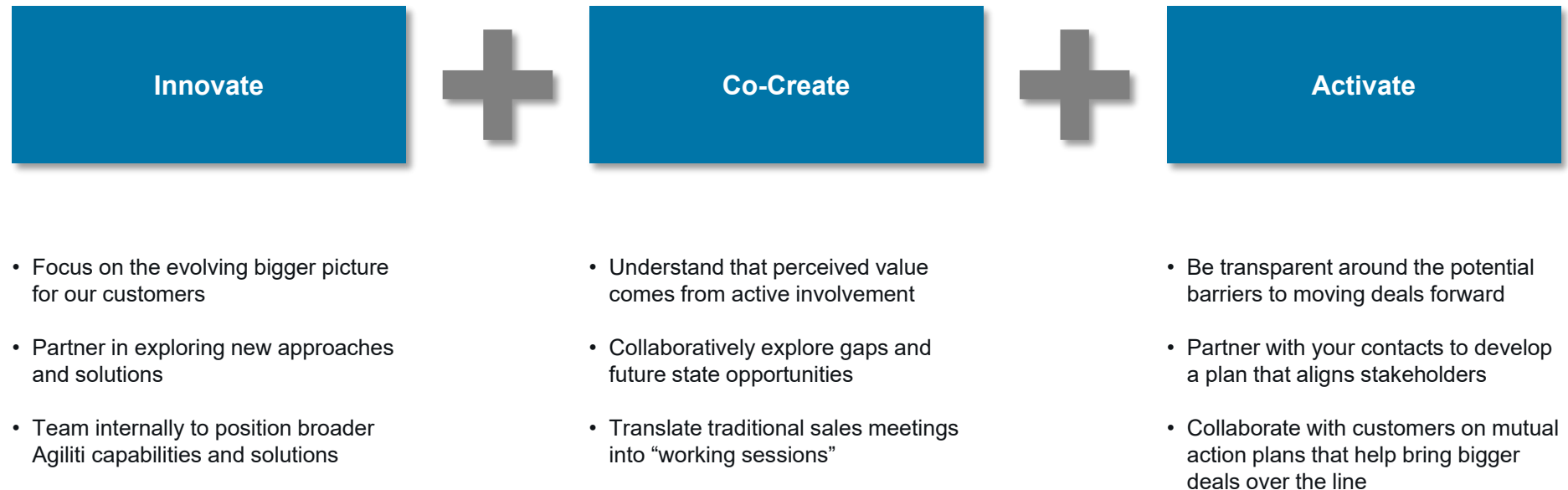
- 9:30a – 11:30a **Training Session 3**
 - Cracking the Account Development Code
- 11:30a – 12:00p **Break**
- 12:00p – 1:00p **General Closing Session**
 - Tom B. and Guest Speaker
- 1:00p – 2:30p **Break**
- 2:30p – 5:00p **Awards Show and Virtual Celebration**

*All times CST

Cracking the Account Development Code

Leading up to Commercial Kickoff, we have taken a closer look at the situational factors to assess for each account. But simply understanding the situation is not enough. Leveraging this insight to define and execute account-specific strategies is key to driving revenue growth. In today's environment, our role in account development is constantly changing. The fundamental skills – asking effective questions, disciplined time management, consistent follow-up, etc. – are just table stakes.

Successful account development today requires a hyper focus on the customer – how can we create value for them? How can we help each stakeholder accomplish their objectives? There are three keys to unlocking the account development code:



Thriving in Today's Environment

The buying environment is continuing to evolve – elevating the requirements for success as sales professionals. With your group, discuss the skills, actions, and resources that are required to step up our account development efforts.

Score each of the following statements from 1 (weakness) to 10 (strength) based on how we currently engage customers.	Score
Assessing account situational factors (most current challenges, issues, and opportunities)	
Identifying our customers' most significant long-term strategic priorities (beyond helping them fight 'daily fires')	
Helping customers look at problems with a fresh lens, seeing problems and opportunities in a different way	
Solving known customer issues using new or innovative healthcare equipment solutions	
Co-creating with the customer to gain a shared understanding of gaps and the desired future state vision	
Collaborating internally to position the full range of Agiliti capabilities for various account opportunities	
Working transparently with the customer to build a plan that aligns multiple account stakeholders	
Engaging customers in open and frank discussions about the barriers to moving forward (competing initiatives, budget, timeline, etc.)	
Partnering with the customer to define clear, realistic next steps and a mutual action plan to drive momentum	
Positioning ourselves to help the customer succeed long-term	
TOTAL (out of 100)	

In the face of disruption, the best organizations embrace change. Rate your average customer on the following:

Your Customers' Current Orientation

Fighting Daily Fires ☐ ☐ ☐ ☐ Future-State Planning

Your Customers' Approach to Problem-Solving

Risk-Averse, Staying the Course ☐ ☐ ☐ ☐ Open to New Ideas and New Thinking

Your Customers' Ability to Adapt Going Forward

Not at All Adaptable ☐ ☐ ☐ ☐ Very Adaptable

We're facing new challenges and pressures every day. What do we need to be successful today (skills, actions, and resources)?

Team Assignments

Group 1

- **Regan McKone**
- David Ysseldyke
- Anthony Lathrop
- Daniel Schoonover
- Marissa Barretta
- Melinda Lee
- Jimmie Kelley
- Michael Burke
- Adam Casares
- Nicole Bermudes
- Scott Basch
- David Jones
- Rodney Martens

Group 2

- **Michael Delahunty**
- Meghan Schellhammer
- Alex Blankenstein
- Bretley Brooks
- Jake Krzeczowski
- Paul Sausedo
- Taylor Wiggins
- Robert Harper
- Nadine Dayton
- David Bailey
- Holly Tiemann
- Casey Branham
- David Myers
- David Mandulak

Group 3

- **Emily Aquino**
- Chelsea Sinjem
- Karl Kou
- Holly Ennis
- Jennifer Merrill
- Marilyn Mitchem
- Tiffany Jones
- Rebecca Hilgers
- Brian Sweeney
- James de la Vara
- Walter Burciaga
- Rachel Jackson
- Angela Roach
- Sarah Superfon

Group 4

- **Jason Knight**
- Tanner Mackenthun
- Amy Fortney-Brown
- Shawn Aronson
- Donnell Porter
- Ilysa Smock
- Mitch Mastey
- Morgan Heavenridge
- Stephanie Burton
- Paul Dudek
- Annie Callendar
- Loreen Martinez
- Adrian Harrison
- Julia McMann
- Kevin Jansen

Group 5

- **Benjamin Frye**
- Ian Chelf
- Kristin Stanley
- Austin Coleman
- Elizabeth Oujesky
- John Powers
- Lukas Fallstrom
- Tessa Epps
- Warren Altobello
- Curtis Gruidl
- Jay Webb
- Leland Mason
- Robert Boyce
- Chris Bateson
- Brent Casper

Group 6

- **Julie Lewis**
- Jeff Kolacinski
- Anayeli Armbrust
- Daniel Beno
- Hector Garcia
- Kimberley Wood
- Michael Thomas
- Lomax Edwards
- Gerald Breen
- Zachary Paul
- Kalinda Turpin
- Teresa Houston
- Michael Bowman

Group 7

- **William Siemer**
- Kanoe Russell
- Anthony Cass
- Cheryl Wille
- Scott Halseth
- Tammy Wendorf
- Todd Fletequal
- Cary Lucian
- Sandra Flick
- David Woldum
- Jay Hennig

Group 8

- **Richard Hallagan**
- Terri Grant
- Christopher Shramek
- Dale Voegeli
- Jill Tigges
- Lindsay Thul
- Michael Ott
- Michael Betancourt
- Robert Dewey
- Kyle DeVries
- Zachary Maahs

Group 9

- **Garth Donaldson**
- Chuck Ommen
- Rachel McKinnon
- Daniel Bommarito
- Jarrod Sargent
- Kevin Dunleavy
- Linda Herald
- Michael O'Keefe
- Anthony Petrocelli
- Patrick Hunter
- Scott Harryman
- Christina DeRoia
- David Mihoci
- Patrick Bossart

Group 10

- **Dean Flitsos**
- Janis Hardie
- Khaldoon Ghazal
- Joseph Prestamer
- Kara Klund
- Mary Mingus
- Robert Schena
- Gina Mulvey
- Jonathan Testwuide
- Shawn Cornell
- Veronica Comfort
- Josh Norris
- Jay Gressner
- Kelly Setzer

Group 11

- **Michael Philipovich**
- Mark Hagen
- Armina Dzomba
- Brian Dill
- Jesse Metcalf
- Joseph Magno
- Joseph Volponi
- Mate Dugandzic
- Sean Donachie
- Leslie Brown
- Lenore Fox

Group 12

- **Leslie Wallace**
- Kristy Hughes
- Leslie Epstein
- Michael McLean
- John Michel
- Seth Mattleman
- Solomon Bond
- James Ahern
- Randal Walker
- Evan Nelson
- Tami Straight
- Mick Kostovic

Group 13

- **Amiee Smith**
- Amy Herman
- Michelle Blem
- Joshua Bigney
- Robert Kirkpatrick
- Michael Kunow
- Jeffrey Marshall
- Scott Pitts
- Connor Novak-Goar
- Brian Lassiter
- Chris DeHart

Group 14

- **Kevin Cray**
- Brad Jacobsen
- Richard Gama
- Kate Standa
- Karen Peebles
- Steven Belcher
- Brandon Michael
- Joseph Schneider
- Aaron Maurer
- Shawn Lease
- Grant McLain
- Kevin Henderson
- Hailey Jones
- Amanda Black

Group 15

- **Kathleen Marc**
- Sally Le
- Claire Solomon
- Carlos Carranza
- Joshua Hundley
- Kimberly Ostrenga
- Stephen Bowling
- James Rygiel
- Amanda Trim
- Douglas Wright
- Roy Ruvalcaba
- Yvette Prouet
- Carlos Borges
- James Trella
- Christine Marion
- Hailey Jones

*Team Leaders are in bold

Choosing Your Team Name

As part of our Commercial Kickoff, you will work closely with a team to develop targeted sales plays to elevate your account development success. Teams will be scored, and a champion will be named by the end of the session. Good luck!

Select your team assignment. After today's session, introduce yourself to your team and leader:

Team	Team Leader	Your Team
1	Regan McKone	
2	Michael Delahunty	
3	Emily Aquino	
4	Jason Knight	
5	Benjamin Frye	
6	Julie Lewis	
7	William Siemer	
8	Richard Hallagan	
9	Garth Donaldson	
10	Dean Flitsos	
11	Michael Philipovich	
12	Leslie Wallace	
13	Amiee Smith	
14	Kevin Cray	
15	Kathleen Marc	

During Day 2 of Commercial Kickoff, you will walk through selected accounts and define key growth strategies. You and your team will:

- Discuss account plans and strategies
- Develop custom 'sales plays' for one account in each revenue motion
- Share best practices with other high-performers
- Identify the skills, support, and resources required for success

Select your team name – be creative!

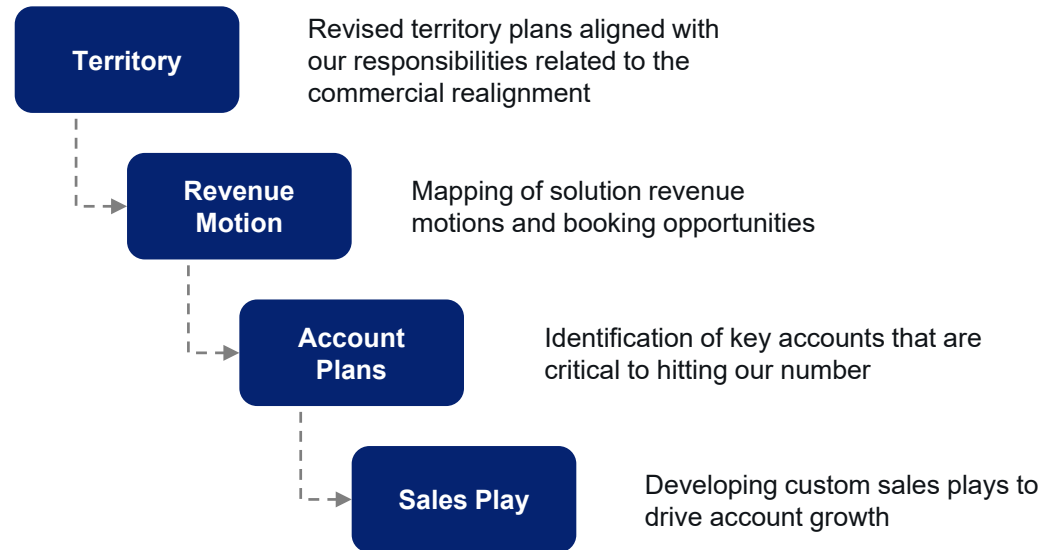
Upload on an image to represent your team (mascot, logo, drawing, meme, etc.):

Connecting All the Pieces

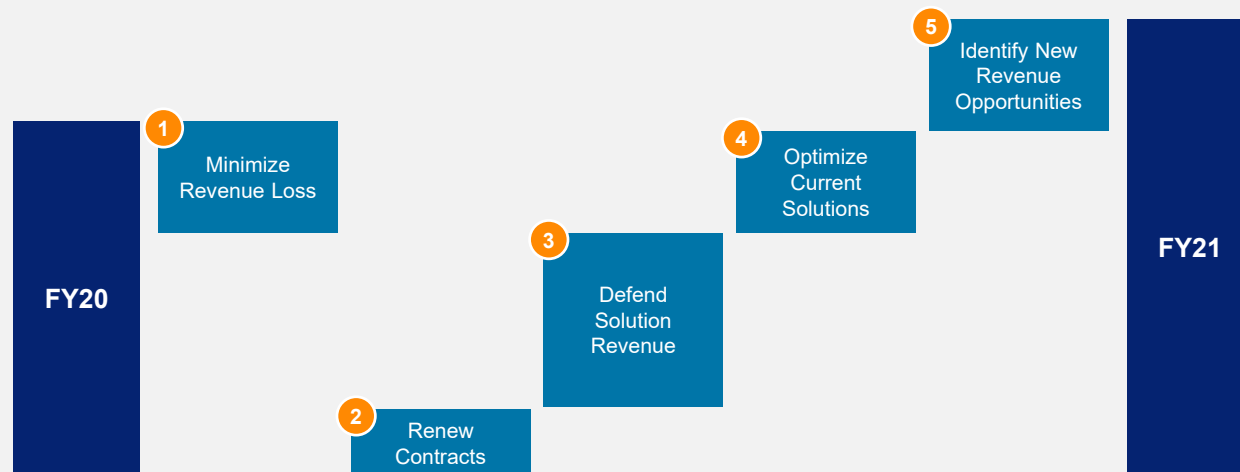
We've covered a lot of ground in sharpening our situational awareness. Situational awareness is key to determining the right way to engage each customer and maximizing our account development efforts.

We began by revising our territory plans – understanding the revenue risks and opportunities across accounts.

Now, we're working towards building a competitive strategy for each account. This overall strategy guides us to a targeted set of sales plays to drive account growth.



Revenue Motions Signal Patterns



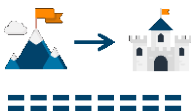





As we work on developing our account plans, it's clear that there are many situational factors to consider. This complexity makes each account seem unique, but patterns emerge.

We first begin by understanding the revenue motion for the account. This helps us see the patterns and guides us in determining the best way to approach the account situation.

Each of the 5 revenue motions signal a targeted selling objective: Save, Renew, Defend, Optimize, and Capture.

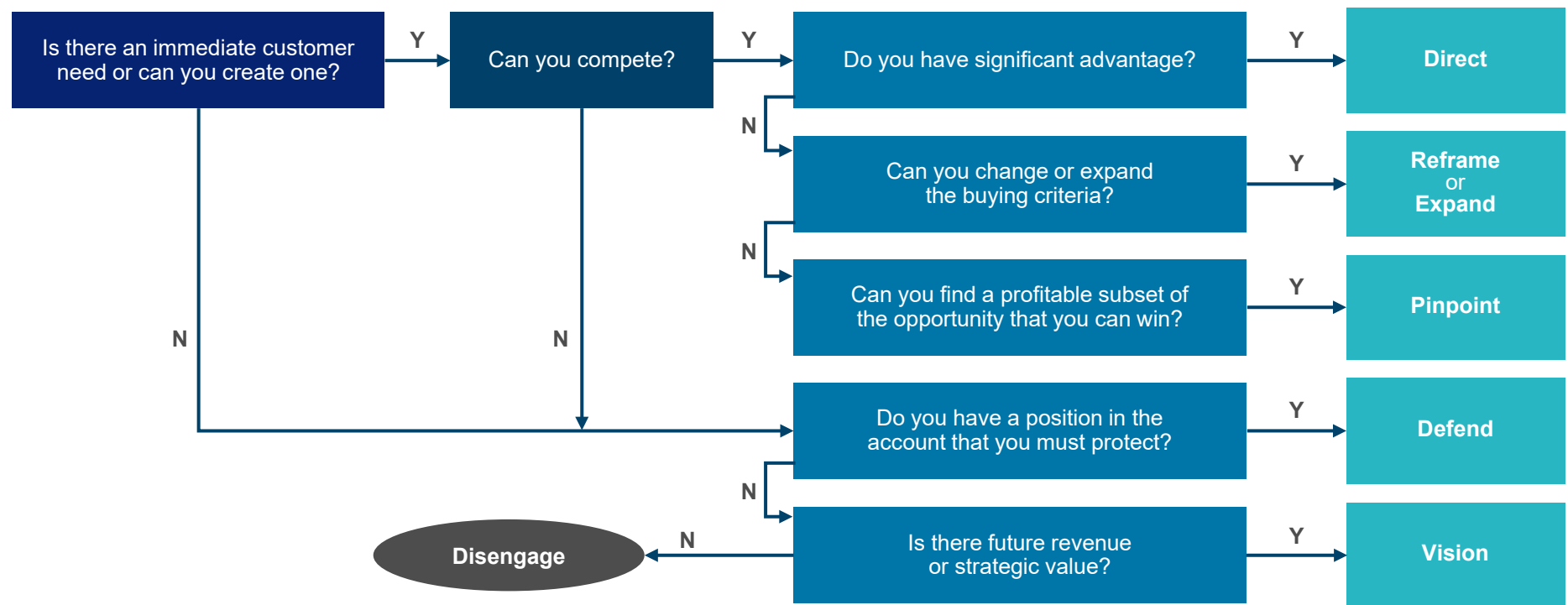
Competitive Strategies

Play	Strategy	Considerations	Additional Details	
 DIRECT	Direct approach is based on the client's perception of your overwhelming superiority in solution, price, or reputation	<ul style="list-style-type: none"> Builds on your perceived strengths Most often used strategy, but most easily defeated 	Reputation & Relationship <ul style="list-style-type: none"> Prestige Comfort/security Relationship experience 	Solution <ul style="list-style-type: none"> Features/price/performance Proprietary technology Whole product
 PINPOINT	Pinpoint focuses the customer on a subset of issues that you're well-positioned to address	<ul style="list-style-type: none"> Often leverages your unique strength or position Typically requires inside support to advocate 	Specialize <ul style="list-style-type: none"> Establish a beachhead in the account "Foot in the Door" 	Co-Exist <ul style="list-style-type: none"> Co-exist with competitors Extend capabilities or capacity Enhance customer's investment (1+1 = 3)
 REFRAME – A > B	Reframe the focus of the client's buying criteria by redefining the problem and solution	<ul style="list-style-type: none"> Requires Champion/Mobilizer support to execute Risks opening the playing field 	Buying Criteria Changes <ul style="list-style-type: none"> Changes or re-prioritizes the criteria Moves the goal posts 	Insight-Led <ul style="list-style-type: none"> Customer misdiagnosed the issue Led by perspective and insight
 PROTECT	Protect plays defend your position from the inevitable assault from your competitors	<ul style="list-style-type: none"> Expand your relationships to a higher level Support your allies Articulate your credibility and business value Beware of self-isolation Keep your eye on your competitors 	Isolate <ul style="list-style-type: none"> Contain the competition Create tangents/diversions Dilute the competitor's efforts 	Insulate <ul style="list-style-type: none"> Improve your relationships Support your allies Extend your presence
 EXPAND – A + 1	Expand the focus of the client's buying criteria by adding elements into the scope of the decision	<ul style="list-style-type: none"> Least 'challenging' of the flank strategies Builds on client's mental model to address gaps in the solution 	Business Issue Orientation <ul style="list-style-type: none"> Focused on business impact Addresses solution adjacencies 	Emphasize Gaps <ul style="list-style-type: none"> Identifies gaps in customer's initial thinking Led by perspective and insight
 VISION	Vision plays establish a position for a possible future engagement	<ul style="list-style-type: none"> No immediate customer need Presence needs to be established for the future work Continue to gain customer intelligence and insight Focus on executive credibility Qualify your ROI 	Educate <ul style="list-style-type: none"> Build the foundation through insight and education Establish a presence, listen, and wait 	Invest <ul style="list-style-type: none"> Assess competitive weakness in account Target marketing investments Build internal advocates and support

When Should You Use Each Competitive Strategy?

With a complete understanding of the situation, we can begin to define our competitive strategy. There are many proven competitive strategies, and each has their own set of situational factors that they are designed to address.

Applying the wrong strategy can have severe impacts on your account – stopping an opportunity in its tracks and damaging trust with key stakeholders. Use the flow chart below to determine the right competitive strategy for your account.



What Makes a Great Play?

Designing sales plays is both a science and an art. Some plays can be applied to many different accounts. But our approach will be more successful when we tailor to the unique account situation. By focusing on the account's business needs and issues, we can drive alignment around a broader set of our solutions and capabilities. Our ultimate goal is to progress the account in their customer journey.

There are two critical aspects to a great play: the design and the execution. Just like in a football game – even the best play design can fall flat with poor situational awareness, execution, and teamwork.



Play Design

- Takes into account all relevant situational factors (issues, opportunities, stakeholders, etc.)
- Aligns with the revenue motion and our selling objectives
- Leverages our existing relationships and strong positioning with stakeholders
- Successfully differentiates Agiliti from our competitors and status quo



Play Execution

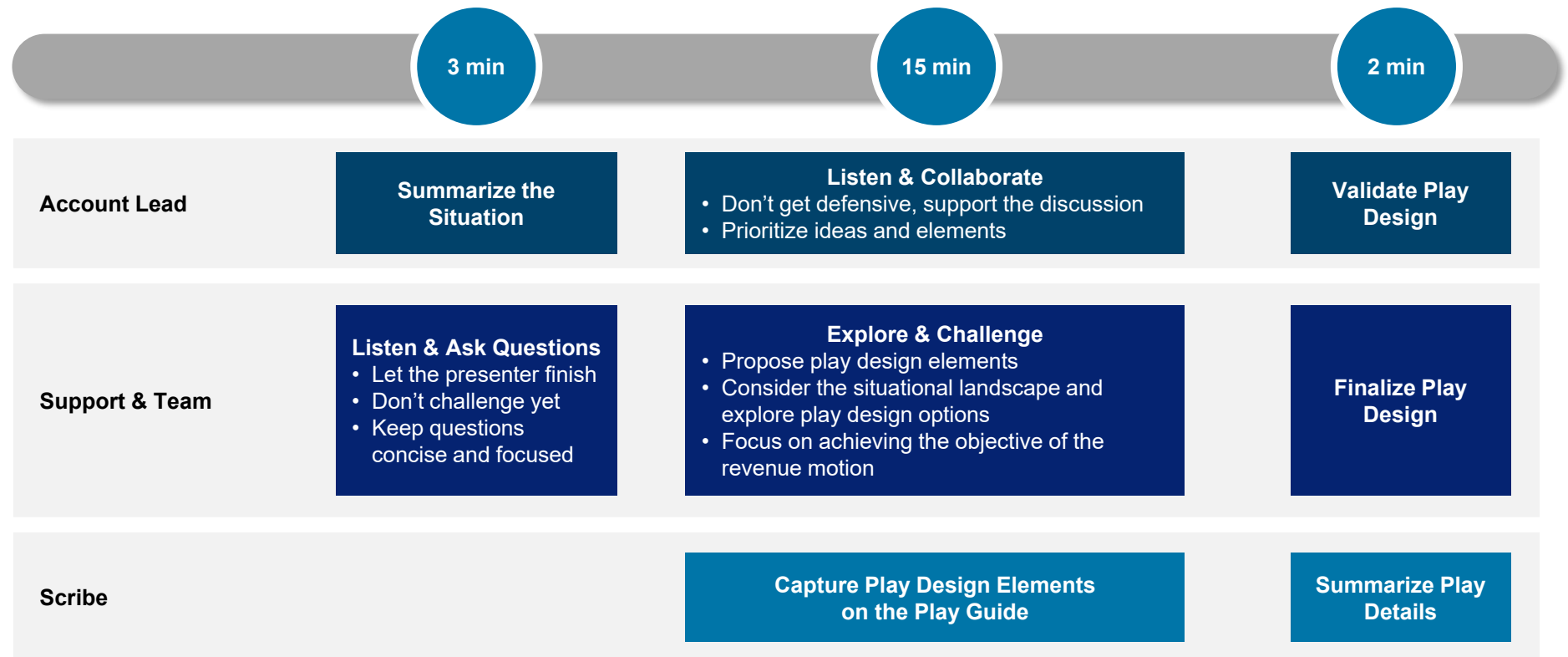
- Actively engages the customer with a co-creative approach – clarifying problems and exploring solutions
- Facilitates transparent discussions with the customer
- Proposes innovative solutions – addressing the same issue in new ways or utilizing new approaches
- Effectively communicates value by delivering the right content/materials at the right time

Building a Sales Playbook

A playbook is an important tool for any team – it's a collection of game-tested actions and strategies to tackle common sales situations. Done right, a playbook defines a common language to help us coordinate and collaborate internally. With the right play, we can work together to maximize value for our customers while driving account growth.

We will build our own sales playbook today – one play for each revenue motion. Use the timing and guidance below to design each play. As you build out your sales plays with your team:

- Focus the play on the specific revenue motion
- Don't go too far into the weeds on the account background
- Think creatively about your play designs
- Demonstrate that you're prepared to execute



Team Workshop Overview

Each team will appoint a Scribe to document their work. The Scribe should complete the tables below for your team and submit back to Sales Enablement (kris.ruedebusch@agilityhealth.com).

Team Name: _____

For each revenue motion, identify an account that your team will develop a custom play:

Revenue Motion	Account Name	Facility ID	Lead / Team	Sales Play
At Risk				
Renewal				
Defend				
Optimize				
Capture				

At the end of the workshop, identify additional accounts that your team believes could benefit from the sales plays you developed:

Account Name	Facility ID	Lead / Team	Sales Play

Sales Play Guide

INSTRUCTIONS:

Develop a custom sales play for one real-life account selected by revenue motion. Use the following guide to document your custom play and be prepared to present your top plays for evaluation and feedback.

Account Name							
Facility ID							
Revenue Motion	At Risk	Renewal		Defend		Optimize	Capture
Type of Play	Direct	Reframe	Expand	Pinpoint	Protect	Vision	
Name of Custom Sales Play							

Account Situational Factors (Challenges, Issues, Stakeholders, etc.)	Innovative Solution
Co-Creation Strategies and Key Messages	Transparency and Stakeholder Alignment
Supporting Materials & Tools (ROI Calculator, Case Studies, Collateral, etc.)	Potential Risks & Barriers for Executing this Custom Play

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Supporting Materials & Tools (ROI Calculator, Case Studies, Collateral, etc.)	Potential Risks & Barriers for Executing this Custom Play

Taking the Next Steps

We've covered a lot of ground together. But the journey doesn't end with the close of Commercial Kickoff. It's time to put the concepts and sales plays into action. Review the sales plays you built with your team and think about how you can apply those to your own accounts. Use the table below to match your top accounts with targeted sales plays to run. Share this with your leader and colleagues for feedback.

Account Name	Facility ID	Sales Play to Run