activeMEDICAL

Sales Process Playbook

2025

Introduction

Purpose

The purpose of this Playbook is to provide you, our sales people, with a sales process to follow. This process will provide greater consistency and a standard to follow across our business units and improve the overall Client Experience.

Structure of this Playbook

The playbook is structured according to each stage of the Sales Process outlined at the beginning of this playbook:

1. Qualification
2. BANT Discovery
3. Create Options
4. Present & Close
5. Manage & Grow

Within each process stage, there will be further detail on the steps required and any related supporting tools.

Our Mission

Designed with healthcare professionals in mind, our solutions empower you to deliver exceptional care by streamlining workflows and enhancing operational efficiency. With a strong focus on aged care, acute care, and the homecare community, we prioritize the safety of both patients and healthcare providers, seamlessly aligning with the unique clinical needs of each environment.

PURPOSE
We do everything with purpose – our solutions are purpose built.

EXCEPTIONAL
We strive for exceptional service and solutions.

RESULTS
We are driven by results for our clients.

SIMPLE
We keep it simple.

ORIGINAL
We are creative and innovative on our pursuit of unique solutions.

NOUS
We have simple and practical intelligence.

ACTIVE
We approach everything proactively with energy.

LOYAL
We have a sense of duty.

Contents

Sales Process Wheel

activeMEDICAL Sales Process	1. Lead Generation	2. Build Desire	3. Create Options	4. Present & Close	5. Manage & Grow
Purpose	Understanding Customer base & explore opportunities	Identify Customer fit & define customer requirements	Providing Solutions & confirming alignment	Finalising solution & Securing the business	Key account management Growing and sustaining relationship
People	Customer Service (1a)/ Sales Support /Territory Managers	Sales Support (2c)/Territory Manager	Sales Support (3a) /Territory Manager	Sales Support / Territory Manager	Sales Support / Territory Manager
Process	**1a.** Inbound /Web lead Desktop qualification **1b.** Make contact & complete discovery call based on territory alignment **1c.** Update CRM and allocate to territory	**2a.** Assess opportunity list and define actions. Update CRM and allocate to territory **2b.** Research customers and build approach for contact call **2c.** Make contact to confirm discovery information and complete BANT qualification Must be via Teams meeting or Phone H2H GO – 3 out of 4 bant Qs Any doubt on need/specification or clinical justification must schedule site visit New account site visit is mandatory NO GO - Must have more than need Not For Now – may have need but no budget or timeframe **2d.** Update CRM with follow up cadence	**3a.** Identify key information to support solutions and generate options **3b.** If required complete site visit and reconfirm all stakeholders and requirements and update CRM **3c.** Use story cards to unpack Active Medical Supplies value proposition and story. **3d.** Reconfirm requirements and trial close for next step GO Not for Now	**4a.** Present proposal or provide quote to client depending on size of opportunity **4.b** Gather feedback, discuss any objections and trial close **4c.** Follow up receipt of quote and handle objections and trial close GO Complete any follow up actions and close sale and update CRM NO GO Update CRM with reason code for lost sale and add follow up cadence for account	**5a.** Develop account growth strategies **5b.** Conduct regular customer check ins and reviews 90 Day plan /Site visits **5c.** Strengthen relationships with industry knowledge and events - CPD - Networking - product launches **5d.** Regularly update CRM when communicating with customers
Systems & Enabling Tools	CRM Discovery Call Checklist	CRM Site visit checklist	CRM Site Visit Checklist/Data capture sheet Follow up cadence	CRM	CRM

Stage 1: Lead Qualification

Purpose

Systematically qualify leads to maximise sales efficiency.

The Lead Qualification stage is where initial interest becomes qualified opportunities through strategic desktop assessment. Leads originate from multiple sources—digital campaigns, referrals, networking, and outreach—covering both new prospects and expansion within existing client relationships.

The qualification process evaluates each lead against qualification criteria, enabling efficient resource allocation and targeted engagement strategies at future stages. This systematic approach ensures only viable leads advance through the pipeline, improving conversion rates whilst maintaining strong relationships across the entire customer ecosystem.

Roles

These steps relate to the

Customer Care (CC),

Internal Sales Person (ISP) and

External Sales Person (ESP) roles.

Steps

- 1a. Lead desktop qualification
- 1b. Make contact and complete qualification call
- 1c. Checkpoint

1a. Lead desktop qualification

Lead generation at Active Medical comes come from multiple sources.

INCOMING LEADS

Incoming leads are primarily generated from:

- **Website Enquiries**
  Potential clients complete web contact forms after browsing product information or downloading resources.
- **Phone Enquiries**
  Prospects call directly after seeing advertisements or receiving referrals.
- **Social Media Platforms**
  Particularly LinkedIn, where strategic content sharing and engagement with healthcare professionals can spark interest in Active Medical's solutions.
- **Conferences & Events**
  Attending industry conferences, trade shows, and networking events provides opportunities to showcase Active Medical's solutions, connect with decision-makers, and generate leads through direct engagement.

TIP
Incoming calls / email inquiries will be handled in the first instance by customer service.

SALES TEAM DRIVEN LEAD GENERATION

Driven by the sales team leads can be sourced from various places:

- **Key Account Management (KAM) Customers**
  Leveraging relationships with existing major clients to identify expansion opportunities, additional departments or facilities that may need equipment, and referrals to their network contacts.
- **Repeat Buyers**
  Proactively reaching out to previous customers for replacement equipment, upgrades, or additional product needs based on their purchase history and equipment lifecycle timelines.
- **Industry Research**
  Monitoring publications for facility expansions or equipment upgrades.
- **Construction Tracking**
  Using the BCI website to identify new construction Projects and opportunities.
- **Local Provider Research**
  Researching healthcare providers such as occupational therapists or physiotherapy clinics in target areas and NDI providers.
- **Social Media Platforms**
  Particularly LinkedIn, where you can look for targeted business, healthcare professionals, and decision makers who would benefit from Active Medical's solutions.
- **Customer Visits**
  Engaging directly with existing and potential clients through on-site visits to understand their needs, demonstrate products, and strengthen relationships that can lead to new opportunities and repeat business.
- **Networking Events**
  Attending industry specific events an lead to immediate and future opportunities driving the lead pipeline.

Before engaging any prospect, check HubSpot to identify if customer is pre-qualified.

IF CUSTOMER SHOWS AS KEY ACCOUNT MANAGEMENT PRE-QUALIFIED IN HUBSPOT

Proceed directly to Section 2c

IF CUSTOMER IS NEW/UNQUALIFIED LEAD

Continue with standard lead qualification process

> *Note: If uncertain about Key Account Management status, check with sales manager before proceeding with engagement strategy.*

CALL SCRIPT - INITIAL CONTACT

OPENING:

"Hello [CLIENT NAME], this is [Your Name] from Active Medical. Thanks for your enquiry - I need further details so I can better handle your request. Can I ask a few questions?"

CORE QUALIFICATION QUESTIONS:

"What type of facility are you operating?" (e.g. private practice, hospital, aged care, rehabilitation centre)

"WHAT CLINICAL CHALLENGES ARE YOU CURRENTLY FACING WITH YOUR EXISTING EQUIPMENT?"

"Any specific requirements like space constraints, patient capacity, compliance needs, or integration with current systems?"

"Do you have preferences around training requirements, service agreements, or financing options?"

OPPORTUNITY ASSESSMENT QUESTIONS:

"Who else is involved in equipment purchasing decisions at your facility?"

"What's your timeframe for implementing new equipment?"

"Do you have a budget range in mind for this project?"

QUALIFYING CLOSE:

"TThe more detail you can provide, the better we can align the right equipment and support services to your needs — and move forward efficiently. Based on what you've told me, I'd like to arrange a follow-up. When would be a good time for you?"

DESKTOP QUALIFICATION

When assessing inbound leads and before making contact to complete the discovery call, perform a desktop qualification. We need to know who they are, what they are calling about, and where does it need to go?

Here are the key desktop qualification elements:

INITIAL ASSESSMENT

1. Customer Name and Facility
2. Equipment or need (the what)
3. Customer Time-frame / expectations
4. Position (role at client business)

CORE QUALIFICATION STEPS

- Customer Name and Facility
- Equipment known? Need known?
- Customer timeframe/expectations
- Position

MARKET TYPE/ PRACTICE / BUSINESS DETAILS

- Size (number of beds)
- Department type:
  - Healthcare dept: Aged, Acute, Reseller
  - Homecare dept: NDIS, MASS, HIRE, Other
- Product group
- Facility type (private practice, hospital, clinic) [Refer to incoming call routes]
- Location and territory

DECISION-MAKER

- Is the person you're speaking with the key decision maker?
- If not can you identify their position

REMEMBER

While you are qualifying, populate qualification data directly into HubSpot.

Customer Care: When transferring leads, do a proper handover - "I have [name] from [customer] on the line interested in X, Y, Z - I'll put them through."

1. ISP (Internal Sales Person)
2. ESP (External Sales Person)
3. TL (Team Leader)

> *When an enquiry cannot be qualified, use the call script below. If the customer doesn't answer call, send them an email requesting a time to catch up via phone call*

CALL SCRIPT - UNQUALIFIED ENQUIRIES

OPENING:

"Hello [CLIENT NAME], this is [Your Name] from Active Medical. Thanks for your enquiry - I need further details so I can better handle your request. Can I ask a few questions?"

QUALIFICATION QUESTIONS:

"What type of facility are you operating?" (e.g. private practice, hospital, aged care, rehabilitation centre)

"What clinical challenges are you currently facing with your existing equipment?"

"Any specific requirements like space constraints, patient capacity, compliance needs, or integration with current systems?"

"Do you have preferences around training requirements, service agreements, or financing options?"

CLOSING:

"The more detail you can provide, the better we can align the right equipment and support services to your needs — and move forward efficiently."

1b. Make contact & complete qualification call

First impressions are always important as it can set the tone for the entire business relationship.

At this step in the sales process you are making first contact to complete the call, to further assess the potential lead and the opportunity it may present and to identify if the lead gets added to the Opportunity/Deal List.

BUILDING RAPPORT PHONE TIPS

Building rapport through a telephone call is essential for creating a positive connection with potential Customers.

BELOW ARE SOME TECHNIQUES TO HELP ESTABLISH RAPPORT:

Smile Through the Phone
Even though they can't see you, they can often hear a smile in your voice. Smiling while you talk can help create a warm and friendly tone.

Introduce Yourself Clearly
Start the call by introducing yourself and Active Medical. Use a clear and confident tone to convey professionalism.

Use the Prospect's Name
Address the lead by their name throughout the conversation. This personal touch makes them feel valued and acknowledged.

Be the Positive Person in Your Customer's Day
Bring energy and enthusiasm to every call. Your positive attitude can be contagious and help create a memorable interaction that stands out from their other business calls.

Active Listening
Pay close attention to what the prospect is saying. Nodding (even though they can't see it) and verbal cues like "I understand," or "that makes sense" show that you're engaged.

Ask Open-Ended Questions
Open-ended questions encourage the prospect to share more about their needs and preferences. This helps you best direct their enquiry to the right person or territory. Open ended questions cannot be answered by 'Yes' or 'No', and typically start with 'Who', 'What', 'When', 'Why', 'How'.

Use Mirroring
Match the pace, tone, and energy of the prospect's speech. This can subconsciously make them feel more comfortable talking to you.

Respect Their Time
Begin by asking if it's a good time for them to talk. Also, let them know the approximate duration of the call.

1c. Checkpoint

Have you populated HUBSPOT with all notes taken throughout the qualification? The ISP should not to be asking for more information. If they are you need to refine your note taking during qualification.

Ensure that all HUBSPOT data has been entered correctly. Spending the time to enter data correctly sets up every other stage in the sales process.

TIP
If an ISP or ESP receives a lead directly (via phone or email), it is their responsibility to add this to the opportunity list in HUBSPOT.

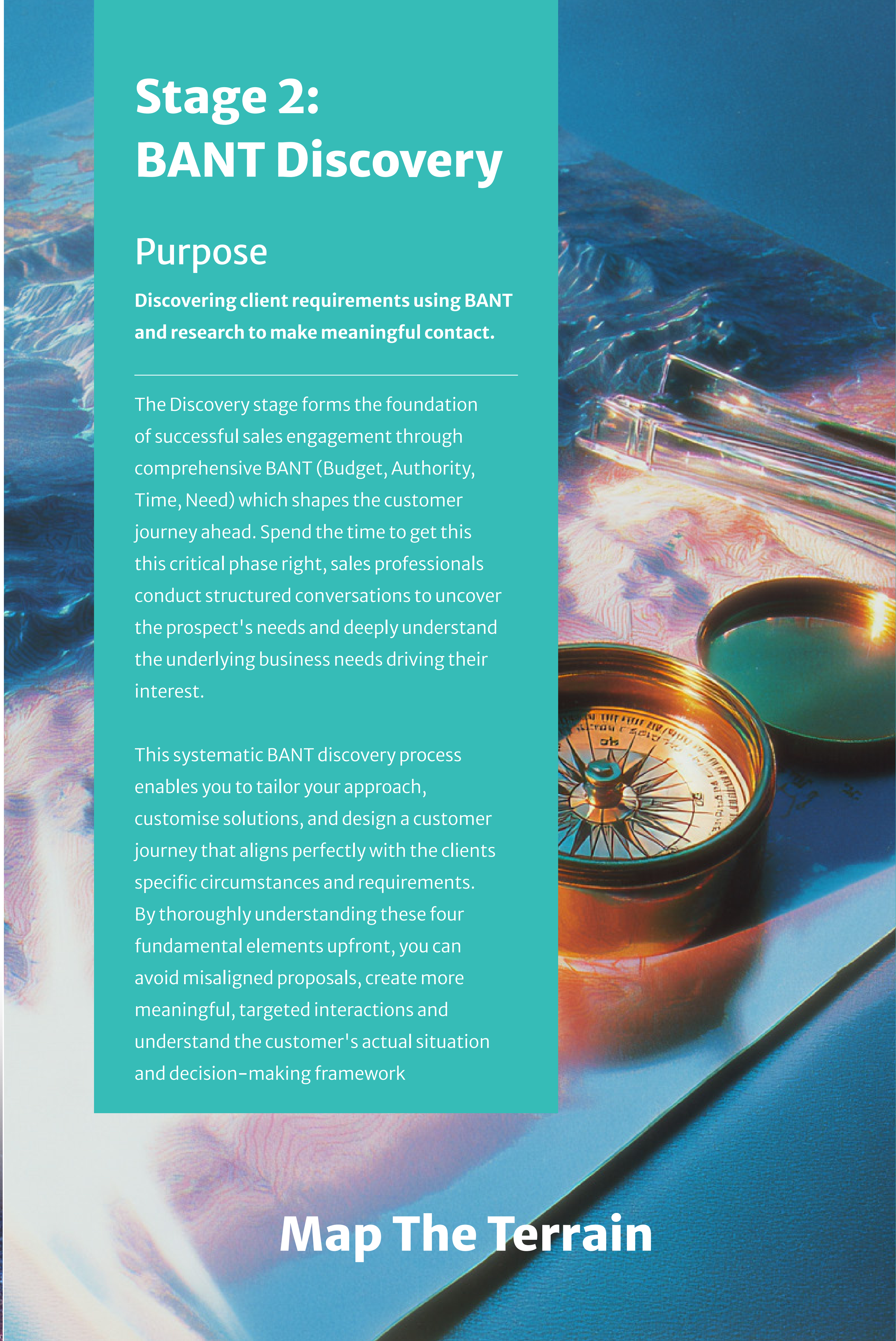
Stage 2: BANT Discovery

Purpose

Discovering client requirements using BANT and research to make meaningful contact.

The Discovery stage forms the foundation of successful sales engagement through comprehensive BANT (Budget, Authority, Time, Need) which shapes the customer journey ahead. Spend the time to get this this critical phase right, sales professionals conduct structured conversations to uncover the prospect's needs and deeply understand the underlying business needs driving their interest.

This systematic BANT discovery process enables you to tailor your approach, customise solutions, and design a customer journey that aligns perfectly with the clients specific circumstances and requirements. By thoroughly understanding these four fundamental elements upfront, you can avoid misaligned proposals, create more meaningful, targeted interactions and understand the customer's actual situation and decision-making framework



Identify BANT

UNDERSTANDING THE BANT FRAMEWORK

The qualification process is essential to determine whether an opportunity is worth pursuing. Active Medical uses both BANT (Budget, Authority, Need, Timeline) to comprehensively assess potential opportunities.

QUALIFY WITH BANT

It is vital to qualify all sales opportunities before we expend any significant effort on customer enquiries. The BANT technique assists with qualification.

Salespeople frequently miss their sales targets for almost always the same reason – they have spent too much time on opportunities that didn't close. Good qualification reduces this likelihood.

Roles

These steps relate to the

Internal Sales Person (ISP) and

External Sales Person (ESP) roles.

Steps

2a. Assess deal list and research to define actions

2b. Build approach for contact

2c. Make contact to confirm discovery information and complete BANT. Must be via Teams meeting or phone H2H qualification

GO — 3 out of 4 BANT questions
Any doubt on need/specification or clinical justification must schedule site visit. New account site visit is mandatory

NOT FOR NOW — May have need but no budget or timeframe
Update CRM with follow-up cadence

NO GO — Must have more than need

2a. Assess deal list and research to define actions

KEY ELEMENTS OF THE FIRST CONTACT

Remember that the healthcare industry values professionalism and knowledge. We need to position Active Medical as a trusted partner in providing solutions that enhance patient care and operational efficiency.

WHEN MAKING FIRST CONTACT

Introduce yourself and Active Medical clearly – use your elevator pitch and or scripts

↓

Reference any previous touchpoints (website enquiry, phone call, event meeting, referral)

↓

Briefly mention the relevant solutions Active Medical offers that may address their needs

TIP
You are building a 10 year relationship – approach every interaction with a long-term partnership mindset rather than focusing solely on the immediate sale.

Once the Opportunities/Deal List has been assessed and the territory/rep allocated thorough research is essential to understand the full picture prior to making contact and qualifying the lead.

KEY RESEARCH AREAS

1. For New Customers
    - Organisation type and decision-making process
    - Financial considerations and budget cycles
    - Current equipment and pain points
    - Competitive landscape analysis
2. For Existing Customers
    - Has the customer been allocated a budget? Are they on track?
    - Previous purchase history and satisfaction levels
    - Expansion opportunities within current setup
    - Service history and relationship strength
3. Generic Research (All Customers)
    - Understand formal and informal decision-making structure
    - Identify key influencers beyond obvious decision-makers
    - Research facility's capital approval process
    - Identify current clinical risks or shortcomings

Leverage multiple sources to build a comprehensive understanding:

- Review past interactions in HUBSPOT
- Utilise BCI and other industry databases and publications
- Check facility websites and annual reports
- Monitor tender notices and procurement plans
- Network with industry contacts for insider insights
- Review appropriate standards, outcomes and requirements

BUILD APPROACH FOR CONTACT

With thorough research completed, build an approach for an effective and structured engagement plan tailored to the specific opportunity. Contact methods will be dependent on client type and salespeople will need to use their discretion.

Some elements of an effective contact approach are:

- Define clear objectives
- Stakeholder engagement
- Value proposition alignment

For larger healthcare facilities (hospitals, aged care groups):

- Phone calls followed by formal emails may be most effective. When possible, aim for video conference or in-person meetings for more substantial discussions.

For smaller practices and independent clinicians:

- Phone conversations and email introductions with educational content may yield better results initially, however phone conversations are always better for building rapport.

For New Prospects
Begin with educational discussions about industry challenges before introducing product specifics. To establish Active Medical credibility use case studies and success stories.

For Existing Clients
Reference previous positive experiences and focus on expanding the relationship. Look for cross-selling opportunities based on their current Active Medical products.

For Competitor Replacement
Focus on pain points with existing solutions and clearly articulate Active Medical advantages. Provide strong evidence through testimonials and comparative.

2c. Make contact to complete BANT qualification

INITIAL CONTACT

Begin with a professional introduction of yourself and Active Medical , followed by a brief explanation of why you're reaching out. Reference your approach plan and preparation, use any previous interactions or referrals if applicable, as this helps establish immediate credibility.

When making contact:

- Introduce yourself and Active Medical clearly - use elevator pitch or scripts
- Reference any previous touchpoints (website enquiry, phone call, event meeting, referral)
- Briefly mention the relevant solutions Active Medical offers that may address their needs
- Aim to schedule a discovery meeting rather than attempting to sell immediately

BUILDING RAPPORT EFFECTIVELY

Building rapport in any sector, particularly healthcare, requires demonstrating understanding of the specific challenges faced by different facilities, practitioners and professionals.

When contacting and engaging with healthcare professionals:

1. Acknowledge their time constraints and be concise
2. Demonstrate knowledge of the relevant regulations and industry challenges
3. Ask thoughtful questions about their operational processes and patient care goals.
4. Listen actively to their responses, taking careful notes for follow-up opportunities.

BANT CALL SCRIPT - HEALTHCARE NEW CUSTOMERS

ANSWER WHEN THE CALL IS PICKED UP:

"Good morning/afternoon, is this [CLIENT NAME]?"

WAIT FOR CONFIRMATION

INTRODUCE YOURSELF AND REFERENCE PREVIOUS TOUCHPOINT:

"Hi [CLIENT NAME], this is [YOUR NAME] from Active Medical. We received your enquiry about [EQUIPMENT/SERVICE] through our website. Is now a good time to chat for about 10 minutes?"

IF YES CONTINUE, IF NOT, ARRANGE A BETTER TIME

ACKNOWLEDGE THEIR INQUIRY:

"You expressed interest in [SPECIFIC EQUIPMENT] for your [FACILITY TYPE]. I'd like to understand your requirements so we can provide the most suitable healthcare solution."

BANT QUALIFICATION:

Budget: "Have you allocated a budget range for this equipment investment?"

Authority: "Who else would be involved in the decision-making process for clinical equipment?"

Need: "What clinical challenges are driving the need for new equipment right now?"

Timeline: "When are you looking to have a solution operational in your facility?"

ADDRESS IMMEDIATE QUESTIONS:

"Any specific concerns about clinical integration, staff training, or ongoing support?"

PROGRESS THE CONVERSATION:

"Based on what you've shared, I believe we have healthcare solutions that could address your clinical needs. Would you be open to a brief site visit so I can better understand your facility and provide tailored recommendations?"

BANT CALL SCRIPT - HEALTHCARE EXISTING CUSTOMERS

ANSWER WHEN THE CALL IS PICKED UP:

"Good morning/afternoon, is this [CLIENT NAME]?"

WAIT FOR CONFIRMATION

INTRODUCE YOURSELF AND REFERENCE PREVIOUS TOUCHPOINT:

"Hi [CLIENT NAME], this is [YOUR NAME] from Active Medical. We received your enquiry about [EQUIPMENT/SERVICE] through our website. Is now a good time to chat for about 10 minutes?"

IF YES CONTINUE, IF NOT, ARRANGE A BETTER TIME

ACKNOWLEDGE THEIR INQUIRY AND RELATIONSHIP:

"You expressed interest in [SPECIFIC EQUIPMENT] for your [FACILITY TYPE]. Given our existing partnership with your facility, I'd like to understand how this fits with your current Active Medical equipment."

BANT QUALIFICATION:

Budget: "Is this equipment included in your current budget allocation, or are you on track with your facilities budget?"

Authority: "Are the same decision-makers involved as with your previous Active Medical purchases?"

Need: "How does this new requirement relate to your existing Active Medical solutions?"

Timeline: "When do you need this to integrate with your current setup?"

ADDRESS IMMEDIATE QUESTIONS:

"Any specific concerns about compatibility with your existing Active Medical equipment or service agreements?"

PROGRESS THE CONVERSATION:

"Based on our existing relationship and what you've shared, I can see how this fits with your current solutions. Would you like me to arrange a visit to assess how this integrates with your existing Active Medical equipment?"

BANT CALL SCRIPT - HOMECARE NEW CUSTOMERS

ANSWER WHEN THE CALL IS PICKED UP:

"Good morning/afternoon, is this [CLIENT NAME]?"

WAIT FOR CONFIRMATION

INTRODUCE YOURSELF AND REFERENCE PREVIOUS TOUCHPOINT:

"Hi [CLIENT NAME], this is [YOUR NAME] from Active Medical. We received your enquiry about [EQUIPMENT/SERVICE] through our website. Is now a good time to chat for about 10 minutes?"

IF YES CONTINUE, IF NOT, ARRANGE A BETTER TIME

ACKNOWLEDGE THEIR INQUIRY:

"You expressed interest in [SPECIFIC EQUIPMENT] for your [FACILITY TYPE]. I'd like to understand your homecare requirements so we can provide the most suitable solution."

BANT QUALIFICATION:

Budget: "Have you allocated funding for this equipment? Are you working with NDIS, private funding, or other arrangements?"

Authority: "Who else would be involved in the decision-making process for this equipment?"

Need: "What's driving the need for this homecare equipment right now?"

Timeline: "When do you need this solution in place for the client?"

ADDRESS IMMEDIATE QUESTIONS:

"Any specific concerns about delivery, setup, or ongoing maintenance for homecare use?"

PROGRESS THE CONVERSATION:

"Based on what you've shared, I believe we have homecare solutions that could meet your needs. Would you be open to a consultation to discuss the best options for your specific situation?"

BANT CALL SCRIPT - HOMECARE EXISTING CUSTOMERS

ANSWER WHEN THE CALL IS PICKED UP:

"Good morning/afternoon, is this [CLIENT NAME]?"

WAIT FOR CONFIRMATION

INTRODUCE YOURSELF AND REFERENCE PREVIOUS TOUCHPOINT:

"Hi [CLIENT NAME], this is [YOUR NAME] from Active Medical. We received your enquiry about [EQUIPMENT/SERVICE] through our website. Is now a good time to chat for about 10 minutes?"

IF YES CONTINUE, IF NOT, ARRANGE A BETTER TIME

ACKNOWLEDGE THEIR INQUIRY AND RELATIONSHIP:

"You expressed interest in [SPECIFIC EQUIPMENT] for your [FACILITY TYPE]. Given our existing homecare partnership, I'd like to understand how this fits with your current Active Medical services."

BANT QUALIFICATION:

Budget: "Have you allocated funding for this equipment?"

Authority: "Are the same people involved in this decision as with your previous Active Medical homecare equipment?"

Need: "How does this new requirement complement your existing Active Medical homecare solutions?"

Timeline: "When do you need this to work alongside your current equipment?"

ADDRESS IMMEDIATE QUESTIONS:

"Any specific concerns about compatibility with your existing homecare setup or service arrangements?"

PROGRESS THE CONVERSATION:

"Based on our existing homecare relationship and what you've shared, I can see how this enhances your current solutions. Would you like me to arrange a consultation to assess how this works with your existing Active Medical homecare equipment?"

GO: 3 out of 4 BANT questions

New account site visits are mandatory.

Any doubt on need/specification or clinical justification must schedule site visit.

Go decisions move to Step 3a.

For highly qualified opportunities ("GO" decisions) schedule immediate next steps within 1-2 business days to maintain momentum. This may include sending promised information, scheduling a solution development meeting, or arranging a product demonstration.

ESTABLISHING AN EFFECTIVE FOLLOW-UP CADENCE

The right follow-up cadence maintains momentum without overwhelming the prospect. Based on the qualification assessment and client's preferences, establish a structured follow-up plan.

NO GO: Must have more than need

If a NO GO, set up a suitable cadence based on the client type and using your discretion regarding the opportunity.

Become comfortable with the uncomfortable.

Empower the team to ask the hard questions.

For existing client reflect on the account management cadence.

NOT FOR NOW: May have need but no budget or timeframe

Set follow up cadence based on your qualification outcomes and the type of client/ opportunity. Use discretion or seek advice from the National Sales Manager.

HEALTHCARE NEW CUSTOMERS - FOLLOW-UP CALL SCRIPT

"Hi [CLIENT NAME], this is [YOUR NAME] from Active Medical. I'm following up on our conversation about [EQUIPMENT] for your [FACILITY TYPE].

I wanted to circle back on a couple of points to ensure we're moving in the right direction:

TO GET TO BANT 3/4, ASK:

"Have you had a chance to discuss the budget parameters with your finance team?"

"Who else needs to be involved in this decision that we haven't spoken to yet?"

"What's changed since we last spoke that might affect your timeline?"

"Are there any new clinical requirements or specifications that have come up?"

Based on where we are, would it make sense to schedule that site visit so I can provide you with a detailed proposal tailored to your specific clinical needs?"

HEALTHCARE EXISTING CUSTOMERS - FOLLOW-UP CALL SCRIPT

"Hi [CLIENT NAME], this is [YOUR NAME] from Active Medical. I'm following up on our conversation about adding [EQUIPMENT] to your current Active Medical setup.

Since we last spoke:

TO GET TO BANT 3/4, ASK:

"Has this been approved within your existing budget allocation for this financial year?"

"Do we need to involve anyone new in this decision, or are the same stakeholders from your previous purchases handling this?"

"How has the timeline evolved - are you still looking at [TIMEFRAME]?"

"Any new integration requirements with your existing Active Medical equipment?"

Given our existing relationship, shall we arrange a site visit to assess how this integrates with your current setup and finalise the specifications?"

HOMECARE NEW CUSTOMERS - FOLLOW-UP CALL SCRIPT

"Hi [CLIENT NAME], this is [YOUR NAME] from Active Medical. I'm following up on our conversation about [EQUIPMENT] for your homecare needs.

I wanted to check in on the key points we discussed:

TO GET TO BANT 3/4, ASK:

"Have you confirmed the funding arrangement for this equipment?"

"Who else needs to be consulted in this decision?"

"What's your realistic timeframe now for getting this solution in place?"

"Are there any new care requirements or living situation changes that affect the equipment needs?"

Would you like me to arrange a consultation at the home to ensure we recommend the most suitable homecare solution?"

HOMECARE EXISTING CUSTOMERS - FOLLOW-UP CALL SCRIPT

Hi [CLIENT NAME], this is [YOUR NAME] from Active Medical. I'm following up on our conversation about adding [EQUIPMENT] to your existing homecare arrangement with us.

Since we're already working together:

TO GET TO BANT 3/4, ASK:

"Is this covered under your existing funding, or do we need to process new funding approvals?"

"Are the same people making this decision as with your previous Active Medical homecare equipment?"

"Has your timeline changed for implementing this alongside your current equipment?"

"Any new care needs or changes in the home environment that affect the equipment selection?"

Shall we schedule a home consultation to see how this works with your existing Active Medical homecare setup and finalise the details?"

Category	Details to Record
CONTACT INFORMATION	All stakeholder contact details
QUALIFICATION ASSESSMENT	BANT criteria details and scores
COMPETITIVE INTELLIGENCE	Competitor information mentioned
NEXT STEPS	Agreed actions with specific timelines
ENGAGEMENT INSIGHTS	Client's level of engagement, questions asked, concerns raised
LIKELIHOOD ASSESSMENT	Notes on probability to proceed based on interactions

Opportunity Type	Timeline	Actions	Value-Add Content
"GO" OPPORTUNITIES (HIGHLY QUALIFIED)	1-2 business days	➡ Schedule immediate next steps ➡ Solution development meetings ➡ Product demonstrations	➡ Tailored proposals ➡ Technical specifications ➡ Implementation timelines
DISCOVERY PHASE	Set clear timelines	➡ Follow-up meetings ➡ Pre-meeting information packs ➡ Structured engagement plan	➡ Relevant case studies ➡ Industry insights ➡ Educational materials
"NO-GO" OPPORTUNITIES	Quarterly check-ins	➡ Long-term nurturing strategies ➡ Educational content sharing ➡ Budget cycle reminders	➡ Regulatory updates ➡ Market trends ➡ Technology advances

FOLLOW-UP VALUE PROPOSITION

Each interaction should position Active Medical as a knowledgeable partner rather than just another supplier by providing:

- Relevant case studies
- Industry insights
- Regulatory updates
- Educational content
- Market intelligence

TIP
Set CRM task reminders for all follow-up activities immediately after each client interaction. This prevents opportunities from slipping through the cracks and ensures consistent communication that builds trust and demonstrates your professionalism.

Stage 3: Create Options

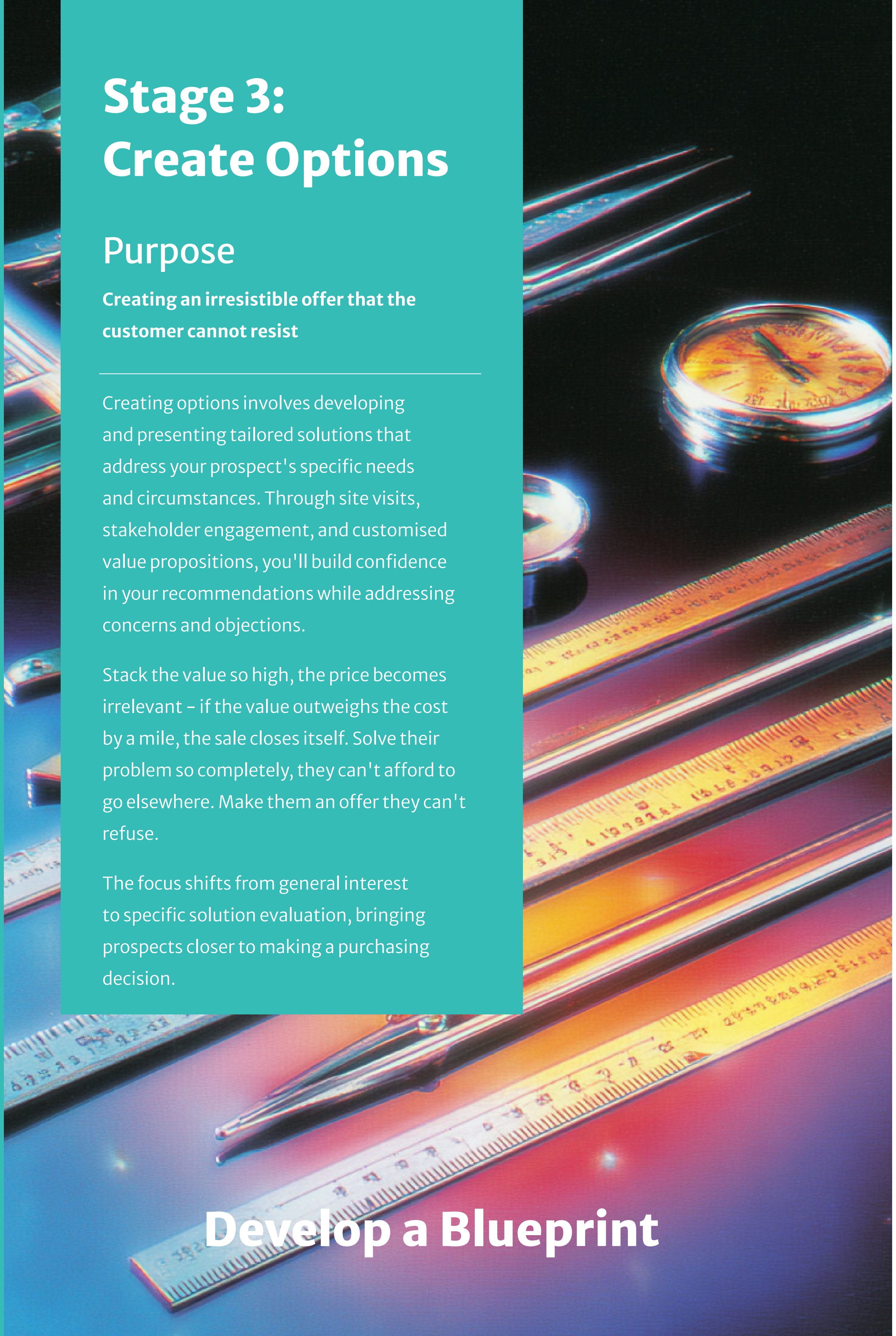
Purpose

Creating an irresistible offer that the customer cannot resist

Creating options involves developing and presenting tailored solutions that address your prospect's specific needs and circumstances. Through site visits, stakeholder engagement, and customised value propositions, you'll build confidence in your recommendations while addressing concerns and objections.

Stack the value so high, the price becomes irrelevant – if the value outweighs the cost by a mile, the sale closes itself. Solve their problem so completely, they can't afford to go elsewhere. Make them an offer they can't refuse.

The focus shifts from general interest to specific solution evaluation, bringing prospects closer to making a purchasing decision.



Roles

These steps relate to the

Internal Sales Person (ISP) and

External Sales Person (ESP) roles.

Steps

- 3a. Generate solution and options
- 3b. Confirmation stage, reconfirm requirments and demo close
- 3c. Use story cards to unpack Active Medical Supplies value proposition and story
- 3d. Reconfirm requirements and demo close for next step

3a. Generate solutions and options

Forming the base of the proposal - Good, better, best

Now that you have a qualified lead with sufficient research it's time to ensure the solution is aligned with the client's specific challenges, priorities, and goals.

You should have most of these details from Stage 2, when you made initial contact and qualified with BANT:

- Identify key decision makers.
- Who is the competition?
- What is the buying process, funding / budget requirements, timelines?
- Map pain points to solution benefits using a consultative approach.
- Leverage historical data, case studies, and competitor analysis to refine insights.
- Validated client requirements through follow-up discussions, confirmation emails, and site visits.

CASE STUDIES BY CUSTOMER TYPE

Healthcare New Customers:
Reference case studies showing successful implementations in similar facility types (hospitals, clinics, aged care) with measurable outcomes like improved patient throughput, reduced wait times, or enhanced clinical capabilities.

Healthcare Existing Customers:
Use expansion success stories from current clients who added new Active Medical equipment, highlighting seamless integration and enhanced operational efficiency.

Homecare New Customers:
Share case studies demonstrating improved quality of life outcomes, family satisfaction, and successful home implementations with minimal disruption.

Homecare Existing Customers:
Present examples of clients who expanded their homecare solutions, showing enhanced care delivery and improved patient independence.

To adequately frame the solution you should have answers to the following questions:

- What are your top 3 challenges right now?
- How does your current solution fall short?
- What would a successful implementation look like for you?

When developing the solution make sure that you and Active Medical are positioned as the best-fit. This is done by aligning product features with customer needs:

- Customised features to directly address client pain points.
- Showcase real-world impact through capability statement, tailored demos, success stories or case studies.
- Provide a clear value narrative: "With Active Medical, you achieve X benefit in Y timeframe with . . . . . "
- Develop a solution roadmap that outlines how the implementation will solve client challenges.

Every follow-up interaction should deliver meaningful value to the client as well as take you closer to the ideal solution

Through delivering value with every touchpoint, you establish yourself as a committed and expert partner rather than merely a salesperson chasing a transaction.

3b. Confirmation stage, reconfirm requirments and demo close

SITE VISIT

When conducting your site and validating your solution, here's what you should be looking out for and assessing during your site visit to develop an accurate solution proposal:

SPACE & LAYOUT

- Room dimensions and ceiling heights for equipment placement
- Access routes (corridors, lifts, doorways) for delivery and installation
- Power supply locations and capacity (voltage, amperage)
- Ventilation and climate control requirements
- Floor load-bearing capacity for heavy equipment
- Nurse call configuration

UTILITIES & CONNECTIVITY

- Available power points and electrical capacity
- Network/IT infrastructure and connectivity options
- Water supply and drainage access (if required)
- Gas supply points (medical gases, etc.)

CURRENT EQUIPMENT EVALUATION

- Condition and age of existing equipment you're replacing
- Compatibility and integration capabilities with current systems
- Change management planning for workflow disruptions during changeover
- Trade-in or disposal requirements
- Training and education needs based on staff familiarity with similar technology

While not equipment specific some of the below factors may assist in validation and potentially lead to other opportunities not previously mentioned by the client or identified in the discovery phase:

OPERATIONAL WORKFLOW

Staff Patterns:

- How many staff will use the equipment and when
- Current workflow processes and bottlenecks
- Training requirements and skill levels
- Shift patterns and equipment usage times

Patient Flow:

- Patient volume and peak usage periods
- Patient mobility considerations
- Emergency access requirements
- Infection control protocols

COMPLIANCE & MAINTAINANCE

- Fire safety and evacuation routes
- Regulatory compliance needs (TGA, accreditation standards)
- Maintenance access and service requirements

LOGISTICAL CONSIDERATIONS

- Delivery timing constraints (operating hours, patient care periods)
- Installation access and staging areas
- Staff availability for training
- Go-live scheduling around critical operations

TIP
Every time you visit a site – there's potential for additional or future opportunities to sell Active Medical Products and solutions.

3c. Use story cards to unpack Active Medical Supplies value proposition and story.

[PLACEHOLDER]

3d. Reconfirm requirements and demo close for next step

If you have the need to reconfirm anything with the client this is your opportunity, but be precise as you have potentially had numerous contact points with the client at this point.

At this point you have narrowed down your solution proposal and attempt a demo close.

DEMO CLOSE – TRIPLICATE OF CHOICE CLOSE

Strategy for handling price/investment discussions:

This approach provides transparency whilst gauging their budget comfort level without pressuring for an immediate commitment

> *"Many of the practice managers, clinical directors, and procurement officers we speak to on projects like this have given some consideration to budget. What's yours?"*

If the response is "I have no idea", your response is "no problem".

In the interests of transparency, let me give you a broad-based budget parameter. If you know this project is around $80,000, say something like:

> *"If you have no idea, that's perfectly fine – let me give you an insight into what it might be. Some facilities who would make an investment into equipment like this would be paying around the $80,000 mark. It will not be $120,000 and it will not be $50,000. Somewhere around the $80,000 range. Can I get some initial feedback on where that figure is sitting with you?"*

ALTERNATIVE EXAMPLES BY EQUIPMENT CATEGORY:

For smaller diagnostic equipment:

> *"...would be paying around the $25,000 mark. It will not be $35,000 and it will not be $15,000..."*

For major surgical/imaging equipment:

> *"...would be paying around the $150,000 mark. It will not be $200,000 and it will not be $100,000..."*

For patient monitoring systems:

> *"...would be paying around the $45,000 mark. It will not be $60,000 and it will not be $30,000..."*

GO

Move onto Stage 4 and presenting proposal and providing a quote.

NOT FOR NOW

Set a follow up cadence based on the outcomes of your interactions and the type of client/ opportunity. Use discretion as a Territory Manager or seek advice from the National Sales Manager.

A follow up cadence could be in:

2 days / 1 week / 3 months / 6 months / or a year.

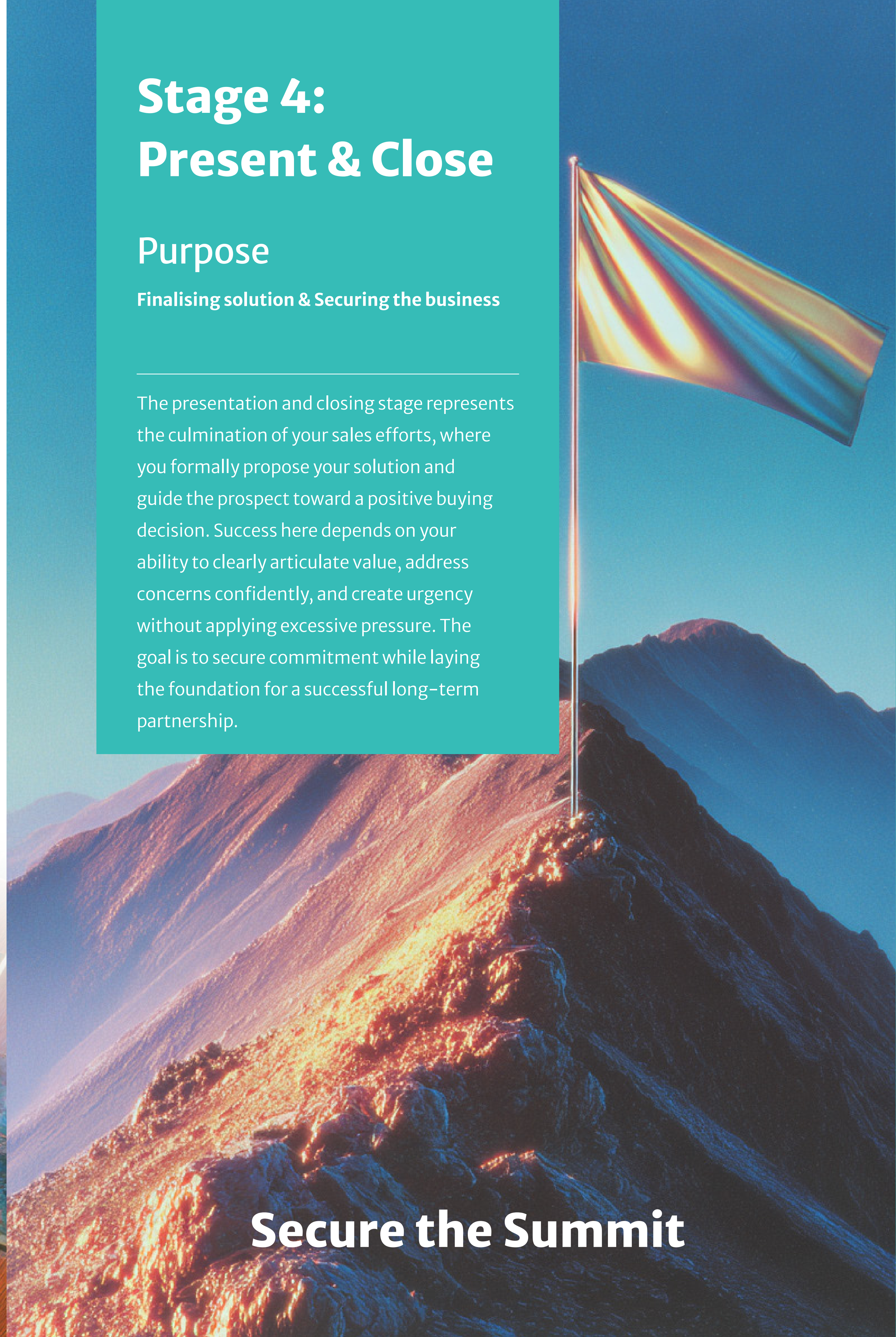
TIP
Whatever the follow up cadence is – make it valuable

Stage 4: Present & Close

Purpose

Finalising solution & Securing the business

The presentation and closing stage represents the culmination of your sales efforts, where you formally propose your solution and guide the prospect toward a positive buying decision. Success here depends on your ability to clearly articulate value, address concerns confidently, and create urgency without applying excessive pressure. The goal is to secure commitment while laying the foundation for a successful long-term partnership.



Roles

These steps relate to the

Internal Sales Person (ISP) and

External Sales Person (ESP) roles.

Steps

- 4a. Present proposal or provide quote to client depending on size of opportunity
- 4b. Gather feedback, discuss any objections and demo close
- 4c. Follow up receipt of quote, handle objections and demo close
- GO Complete any follow-up actions and close sale, then update CRM
- NO GO Update CRM with reason code for lost sale and add follow-up cadence for account

4a. Present proposal or provide quote to client depending on size of opportunity

PREPARING THE PROPOSAL AND QUOTE

The foundation of a successful proposal submission begins with meticulous preparation. Your proposal should reflect both the technical aspects of the solution and the key value propositions that matter most to the client.

PRESENTING THE PROPOSAL

A properly structured client presentation goes beyond simply presenting product information - it's about creating a pathway that leads potential clients to make confident purchasing decisions whilst establishing Active Medical as their trusted, long-term partner.

The goal isn't just to inform, but to guide healthcare professionals through a decision-making process that addresses their clinical needs, operational challenges, and budget considerations in a way that builds confidence in both our solution and our ongoing support capabilities.

FACE-TO-FACE

The preferred method of presentation is face-to-face or on a Web-call like Teams.

This of course depends on the client and opportunity size. For smaller sized deals and email may suffice or if could have gone straight to quote.

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TIP
Review every proposal with a colleague before submission to catch potential errors and ensure clarity. Fresh eyes often spot issues that you might miss after working closely with the content.

PROPOSAL PRESENTATION TIPS - FACE-TO-FACE MEETINGS

PRE-MEETING PREPARATION

Know Your Audience:

- Research all attendees and their roles in the decision-making process
- Understand their specific pain points and priorities
- Prepare customised talking points

Technical Readiness:

- Test all equipment beforehand (laptop, projector, demos)
- Have physical samples or models if applicable
- Prepare printed backup materials in case of tech failures
- Bring branded materials to leave behind

OPENING & STRUCTURE

Start Strong:

- Arrive 10-15 minutes early to set up and greet attendees
- Begin with a brief agenda and confirm meeting objectives
- Recap their current situation and challenges (shows you've listened)

Follow the SPIN Framework:

- Situation - Acknowledge their current state
- Problem - Highlight specific challenges
- Implication - Discuss consequences of inaction
- Need - Present your solution as the answer

DURING THE PRESENTATION

Engagement Techniques:

- Ask questions throughout, don't just present
- Use the prospect's name and facility name frequently
- Reference specific details from your site visit
- Encourage interruptions and questions

Visual Impact:

- Use high-quality images of equipment in similar facilities
- Include before/after scenarios relevant to their situation
- Show ROI calculations with their actual numbers
- Display testimonials from similar healthcare facilities

HANDLING OBJECTIONS

On Price Concerns:

- Always present value before price
- Break down costs into operational impact (for example;per patient, per day)
- Compare to their current costs (maintenance, downtime, inefficiency)
- Offer financing options or payment terms

On Technical Hesitation:

- Address training and support comprehensively
- Provide implementation timeline with minimal disruption
- Share case studies from similar facilities

CLOSING TECHNIQUES

Demo close Throughout:

- "How does this align with your current workflow?"
- "What concerns do you have about implementation?"
- "Which staff members would benefit most from this?"

Strong Finish:

- Summarise key benefits specific to their needs
- Present clear next steps with timelines
- Ask for commitment or specific follow-up action

QUOTE

Create the quote using the HUBSPOT and in line with Active Medical protocols.

[PLACE HOLDER FOR A SAMPLE QUOTE AND PROPOSAL]

4b. Gather feedback, discuss any objections and demo close

The 1-10 trial close is a technique where you ask your prospect to rate their interest/readiness on a scale of 1-10, then use their answer to guide the rest of the conversation.

HOW TO USE IT:

After your presentation/demo, ask:

"On a scale of 1-10, with 1 being completely uninterested and 10 being absolutely ready to proceed, where would you say you are regarding this [equipment/solution] for your [facility/home]?"

Based on their response:

1-6: "It sounds like I was way off base. What were you looking for that I didn't cover?"

7-8: "We're pretty close - what would it take to get you to a 9 or 10?"

(This gets them to tell you exactly what objections remain)

9-10: "Excellent! I'm looking forward to working with you. Let's move forward."

The technique is powerful because you're asking for the business, gauging where you stand, and using their answer to guide the rest of the conversation. It forces you to listen rather than oversell.

4c. Follow up receipt of quote and handle objections and demo close

THE 24-HOUR FOLLOW-UP RULE

Why the First Day Matters: Studies demonstrate that contacting prospects within 24 hours dramatically improves proposal engagement rates. This timing creates an optimal balance, giving clients sufficient time to digest the information whilst keeping your presentation top-of-mind.

Strategic Follow-Up Method

- Start with a courteous touch base to ensure they've received and can access all documentation
- Enquire about their preliminary reactions or queries
- Confirm their comprehension of the proposal's core elements
- Establish clear next actions and deadlines

Sample Follow-Up Enquiries

- "I'm calling to see if you've had an opportunity to look through the proposal we provided yesterday?"
- "Would you like me to elaborate on any elements of our recommended solution?"
- "From our meeting, which components of the proposal do you find most compelling?"
- "When would suit you best to discuss your feedback on the proposal?"

Managing Typical Responses

- If the client hasn't examined it yet: Show empathy and arrange a specific follow-up appointment.
- If they raise questions: Respond immediately and provide supplementary materials where appropriate.
- If they appear uncertain: Investigate their reservations constructively and identify opportunities to refine the solution.

GO

Complete any follow up actions and close sale and update CRM

NO GO

Update CRM with reason code for lost sale and add follow up cadence for account

24-HOUR FOLLOW-UP SCRIPT

"Good morning/afternoon [CLIENT NAME], this is [YOUR NAME] from Active Medical. I'm following up on yesterday's proposal for the [EQUIPMENT/SOLUTION]. Is this a good time to chat?"

If YES CONTINUE

"Have you had a chance to review the proposal we discussed?"

Listen to their response

If they've reviewed it: "What are your initial thoughts? Any questions about the solution?"

If they haven't: "No problem — when do you think you'll have a chance to look it over?"

Address concerns: "Are there any aspects you'd like me to clarify?"

Gauge timeline: "What do you see as the next steps? Are there other stakeholders who need to review this?"

Propose action: "Would it help to schedule a call with [STAKEHOLDERS] to address their questions?"

Stage 5: Manage & Grow

Purpose

Key account management Growing and sustaining relationship

Managing and growing accounts transforms one-time customers into long-term strategic partners who provide recurring revenue and referral opportunities. Through regular check-ins, strategic account planning, and continuous value delivery, you'll maximise customer lifetime value while building a sustainable business foundation. Success in this stage creates the referrals and repeat business that drive long-term sales career success.

Roles

These steps relate to the

Internal Sales Person (ISP) and

External Sales Person (ESP) roles.

Steps

5a. Develop account growth strategies

5b. Conduct regular customer check-ins and reviews (90-day plan/site visits)

5c. Strengthen relationships with industry knowledge and events:
- CPD
- Networking
- Product launches

5d. Regularly update CRM when communicating with customers

5a. Develop Account Growth Strategies

ACCOUNT TIERING AND PRIORITISATION

Categorise your customer base according to revenue potential and growth opportunities:

PLATINUM

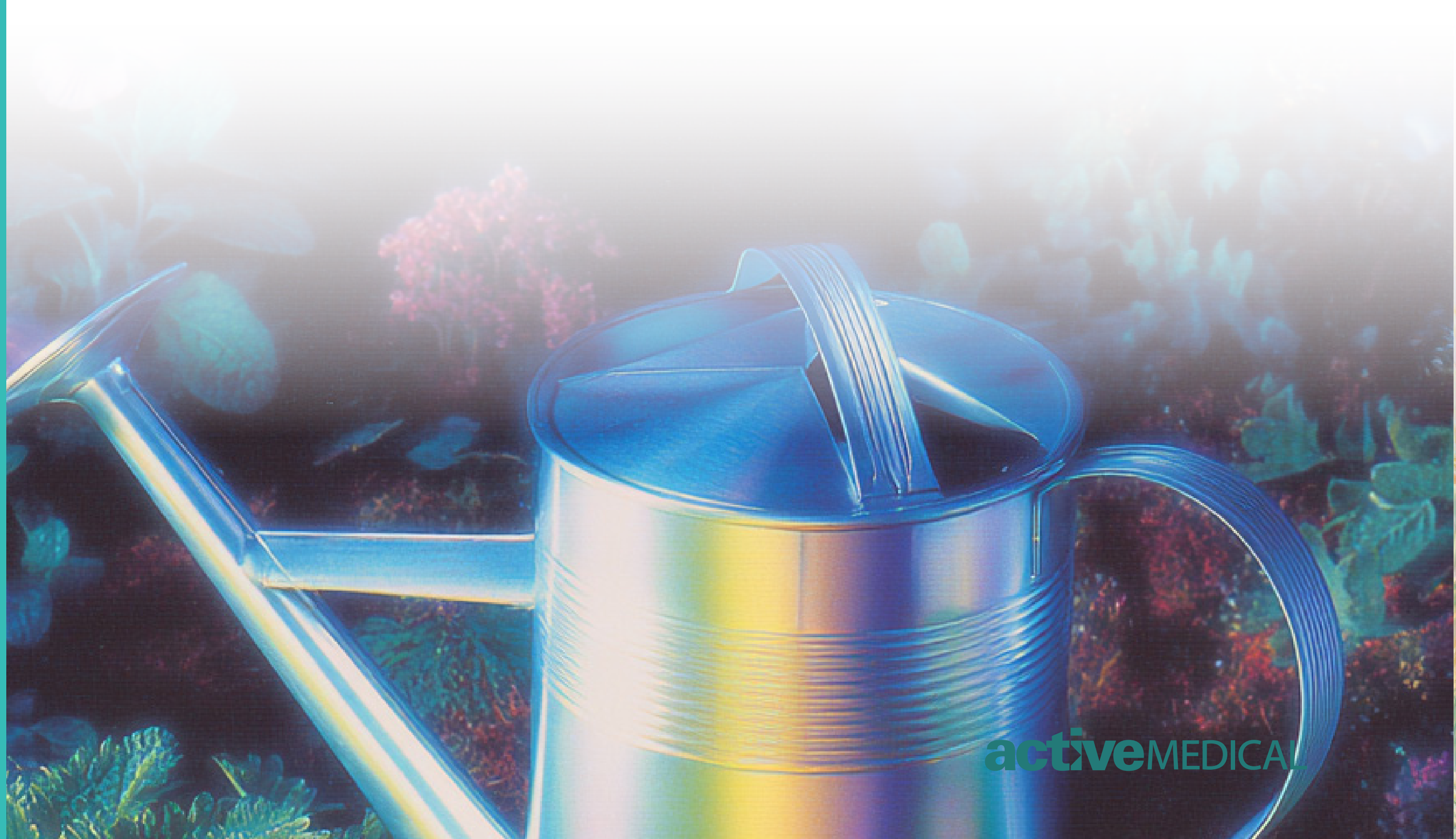
- Quarterly business reviews with senior stakeholders
- Customised territory plans with specific growth targets
- 12-month strategic partnership roadmaps

GOLD

- Bi-annual formal reviews
- Cross-selling focus on complementary products
- Monitor renewal dates 6 months in advance

SILVER

- Track organisational changes and expansion plans
- Monitor budget cycles and capital equipment approvals
- Develop relationships beyond primary contacts



MULTI-CHANNEL REVENUE STREAM ANALYSIS

Review each account's revenue model to identify opportunities:

- **Rental to Purchase:**
  Track rental clients for transition opportunities with ROI analysis
- **Service Expansion:**
  Target equipment nearing warranty expiration for service agreements
- **Cross-Selling:**
  Map departments for untapped opportunities and facility expansions

ACCOUNT GROWTH PLANNING

For your top 100 accounts, develop growth strategies including current footprint gap analysis, competitive assessment, stakeholder mapping, and revenue expansion opportunities by department.

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5b. Conduct Regular Customer Check-ins and Reviews (90-day plan/site visits)

STRUCTURED VISIT CADENCE

Establish predictable touchpoints based on account value:

- **Platinum Accounts:**
  Monthly meetings, quarterly business reviews
- **Gold Accounts:**
  Quarterly check-ins, bi-annual reviews
- **Silver Accounts:**
  Bi-annual meetings, annual satisfaction surveys

90-DAY CUSTOMER SUCCESS FRAMEWORK

For new installations:

- **Days 1-30:**
  Welcome call, user training, satisfaction check
- **Days 31-60:**
  Usage analysis, optimisation recommendations, cross-sell identification
- **Days 61-90:**
  Satisfaction survey, ROI measurement, renewal planning

VISIT STRUCTURE

1. Relationship building and performance review
2. Needs discovery for changes in priorities or budget
3. Solution updates and industry insights sharing
4. Next steps with specific actions and timelines

Use standardised visit checklists to capture attendee details, performance metrics, new requirements, and follow-up actions.

TIP
Schedule the next three interactions immediately after each visit to maintain consistent communication patterns.

90-Day Success Check-in Scripts

DAYS 1-30 SCRIPT

"Hi [CLIENT NAME], this is [YOUR NAME] from Active Medical. How are your staff finding the new [EQUIPMENT] system?"

"Any questions about operation or need for additional training? We want to ensure you're getting maximum value."

DAYS 31-60 SCRIPT

"Good morning [CLIENT NAME], it's [YOUR NAME] from Active Medical. How is the [EQUIPMENT] performing after six weeks?"

"Any improvements in workflow you've noticed? Are there advanced features you'd like training on?"

DAYS 61-90 SCRIPT

"Hi [CLIENT NAME], [YOUR NAME] here. We're approaching three months since installation."

"Would you have 20 minutes this week for a satisfaction review? I'd also like to discuss any future needs."

5c. Strengthen Relationships with Industry Knowledge and Events

CONTINUING PROFESSIONAL DEVELOPMENT (CPD)

Position Active Medical as a clinical education partner:

- **Internal CPD:**
  Monthly lunch-and-learns, clinical workshops, equipment training
- **External CPD:**
  Partner with professional associations, sponsor conference presentations
- **Clinical Updates:**
  Share research findings and regulatory updates relevant to their practice

NETWORKING AND INDUSTRY PRESENCE

- Exhibit at specialty conferences and regional healthcare events
- Host customer appreciation events and facility tours
- Create peer networking opportunities between customers
- Participate in professional association meetings

PRODUCT LAUNCH EVENTS

Leverage launches as relationship opportunities:

- Exclusive previews for key accounts
- Interactive demonstrations and case studies
- Hands-on training and Q&A sessions
- Implementation planning workshops

TRUSTED ADVISOR POSITIONING

Establish credibility by consistently sharing valuable insights on clinical best practices, operational efficiency, and industry developments.

TIP
Create a quarterly education calendar aligned with your visit schedule, ensuring every interaction includes educational value.

5d. Regularly Update CRM When Communicating with Customers

CRM DISCIPLINE STANDARDS

Maintain rigorous CRM standards for accurate forecasting and effective account management. Remember: "Garbage In, Garbage Out" - poor data input leads to unreliable business intelligence.

Mandatory Documentation for Every Interaction:

- Contact details, attendees, and interaction type
- Key discussion points and decisions made
- Customer concerns or competitive intelligence
- Follow-up actions with specific deadlines
- Next scheduled interaction date

CRM BEST PRACTICES

Use consistent formatting for all entries and immediately create follow-up tasks with clear deadlines. Link tasks to relevant opportunities and include context for completion.

WEEKLY CRM MAINTENANCE

Establish a 30-minute weekly routine:

- Monday: Review upcoming tasks and update opportunity probabilities
- Friday: Complete outstanding logs and schedule next week's touchpoints

Regularly audit data for duplicates, outdated information, and missing details to maintain data quality.

PIPELINE TRACKING

Monitor key metrics including time in sales stages, response times, and customer satisfaction scores to identify opportunities requiring intervention.

TIP
Set up automated reports for weekly activity summaries and overdue task notifications to ensure professional service standards.

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