PLAYBOOK

Instruments – Servicing Key Accounts

Instrument Portfolio Overview

The Instrument portfolio supports all surgical specialties, with strength in Neuro, Cardio, Retractation, and General Surgery. We are also strong in Ortho but do not offer implants or procedure specific sets.

Selling surgical instruments requires a structured, value-driven approach that blends perioperative **operational insight, clinical understanding** and **service-based differentiation.** By aligning instrument solutions to procedural needs, efficiency goals, and long-term asset performance, we move **beyond transactional selling** to become a **trusted partner** in the OR.

This playbook outlines the core activities required for your key accounts. Any questions regarding these activities should be directed to your RD.

Activities

- **Targeting**
- **Account Maintenance**
- **Repeating Projects**
- **“Milk Run” Activities**
- **Introduce SPD360™**
- **Cross Sell Aspen Portfolio**

Targeting

☐ **Customer Segmentation** – Review your overall customer segmentation and develop account strategies and priorities for each of your key accounts. A, B, or C segmentation is found throughout Salesforce and Power BI for each of your assigned accounts. The segmentation is derived from weighted scores in the following categories: annual instrument spend (including lap hand and bipolar forceps), annual Aspen spend (minus instruments), contracted pricing tier, physical distance from the AM’s home, and number of ORs.
If you have an account that is incorrectly scored, please reach out to your RD to update.

☐ **Key Accounts** are defined collectively as your A, B and Prime Vendor accounts. For C accounts, activities should be applied selectively, with prioritization determined jointly with your RD to align with account potential.

Account Maintenance

Salesforce Activities

☐ **Account Profile** – Ensure you have a complete understanding of each key customer to maximize account planning and product category targeting. All fields within the Account Profile should be fully and accurately completed. Start by entering key information such as **current year instrument budget, instrument primary vendor and secondary vendor, surgical instruments tracking system, repair vendor**, specialties served, and any other details that influence purchasing behavior and service needs.
Each meeting with these customers is an opportunity to gather additional information to complete their profile.

☐ **Account Plans (w/ Objectives)** – Document your overall account strategy with a minimum of **two** tactical objectives.

- **Account Plans** should clearly define your strategic goals for the account.
- **Objectives** should outline the specific tactics and actions required to achieve those goals.

Examples of tactical objectives include, but are not limited to:

☐ Retraction checks (e.g., Bookwalter® or Greenberg®)

☐ Quarterly Instrument Business Reviews (IBRs)

☐ Backwall cleanup or optimization projects

☐ Cross-selling key Aspen platforms (e.g., SME, Galaxy®)

☐ **Opportunities** – Maintain a healthy, well-balanced sales pipeline to ensure you meet—and ideally exceed—your annual quota. **Aim to keep 3–5x your full-year quota** in qualified opportunities at all times.

☐ **Quarterly Instrument Business Reviews (IBR)** – The IBR helps customers drive compliance and achieve their full cost-savings potential while providing a forum to review performance, share project updates, and discuss future growth and pricing-tier opportunities. It is a less formal alternative to a QBR, typically led by the AM and supported by the PowerBI IBR Report, which details facility-level instrument spend and specialty breakdowns.

“Milk Run” Activities

- ☐ Standing customer **appointments** – weekly, biweekly, or monthly
- ☐ **Proactive** Backorder Updates – review open orders, suggest subs, confirm MTS/MTO status
- ☐ Request a “**missing instrument**” report from their system – quote items on the spot
- ☐ **Project** Updates – review any open or planned projects with Aspen or within their department
- ☐ Create and complete **checklist** of open items on your **Account Profile** – ask questions to get to know your customer
- ☐ Address any open items on **Action Plans** – continually update your progress in Salesforce
- ☐ Review ongoing Implementation activities
- ☐ **eCommerce** & Self-Service Portal – Give your customers **24/7** access to pricing, quoting, order history & details, shipment tracking, invoice history & details, cross referencing, etc.
  - Ensure customers are trained in how to use the various features. Internal refresher training is available here.
- ☐ **Repair bucket** checks – look for opportunities to replace broken instruments
- ☐ Meet new team leaders or management – update **new contacts** in Salesforce
- ☐ Cross **referencing** – confirm MTS/MTO status, provide lead time
- ☐ Count sheet/system updates – Ensure Aspen **part numbers are on the count sheets** and updated in their tracking & ordering systems
- ☐ Introduce or reintroduce **key products**
  - New launches as released
  - **Sharp Kerrison**® - unique and differentiated, only Kerrison available to solve sharpness & cleanability concerns
  - **Galaxy® II Retractor** – Improved product, competitive pricing
  - **Greenberg Simplicity®** - Upgraded version of a trusted product
  - **Bookwalter** Upgrades - lightweight components and ratchets
  - **Bipolar Forceps** – complete line

Repeating Projects

- ☐ Retractor Checks – **Bookwalter®** and **Greenberg®** – Routine checks of each set (document schedule in Salesforce). Look for missing components, mixed manufacturers, broken, damaged components, upgrade opportunities, etc.
- ☐ **Backwall** – Initial cleanup of peg board utilizing Aspen branded cards. Ongoing maintenance during routine visits.

Introduce SPD360 Solutions

- ☐ SPD360 **Solutions** - Optimization services provided to inventory, organize, update, & standardize instrument stock & data.
- ☐ SPD360 **Support** - Implementation and maintenance of solutions, and best practice guidance from on-site Operational Specialists.
- ☐ SPD360 **Sync** - Cloud-based asset management system that manages assets. Supported by **Surgio®** technology.

- Document leads and activity in Salesforce

Cross Sell Aspen Portfolio

- Utilize relationships to pull through additional Aspen products
- Conduct **Quarterly Business Reviews** (QBR) to assess the health of the account, uncover performance gaps, and highlight strategic growth opportunities across the Aspen portfolio. QBRs are also a perfect opportunity to review new acquisitions within the Aspen portfolio such as Flagship, Cygnus and Ruholf.