THE
PRIME
LEADERSHIP

FREE RESOURCE

FREE RESOURCE / E-WORKBOOK

30-60-90 Day & Territory Plan E-Workbook

Medical Sales Interviews

Build the high-level plan that shows initiative, effort and how you think, and sets you apart in your in-person and final interviews.

INSIDE

PART 1 Which plan is right for you, and how to present it

PART 2 Territory Plan: what to ask, what to research, how to stand out

PART 3 30-60-90 Day Plan: guide + fillable worksheet

START HERE

Which Plan Is Right for You?

A plan is your differentiator. It doesn't need to be perfect. It shows initiative, effort and how you think, and even explaining your approach out loud can set you apart.

ENTRY-LEVEL & ASSOCIATE ROLES

Territory Plan

Shows how you'd learn and work a specific territory: the accounts, the customers, and how you'd start generating activity. Practical, specific and well-suited to associate and early-career roles.

MID-SENIOR ROLES

30-60-90 Day Plan

Shows how you'd ramp over your first three months, with goals and measures for each phase. The stronger choice for mid-senior roles, and it can still help entry-level candidates stand out.

EVERY PLAN COVERS THREE THINGS

01
Learn
The product, the market, the competition and the territory.

02
Build Relationships
With customers, clinicians, your team and existing accounts.

03
Generate Activity
Start moving business forward in the territory.

WHEN TO PRESENT IT

- At an in-person sit-down interview or the final interview
- On a field ride, only if it comes up naturally
- Haven't presented it yet? Present it at the final.

HOW TO PRESENT IT

- High-level: one or two pages
- In person: a printed copy for each person. Virtual: file open, screen-share tested
- Walk through it in 60 to 90 seconds (2 minutes max), then invite their input: "What would you add or change?"

WHERE TO FIND YOUR INFORMATION

- The job description and your interview notes (what they said they need)
- The company website, news and product pages
- Your recruiter
- LinkedIn: the team, their customers, competitor reps
- Google Maps and hospital, surgery center and clinic websites in the territory
- Challenges people shared with you in earlier interviews

A Building Your Territory Plan

Show them you already understand the ground you'd be covering, who you'd call on, and how you'd win.

A strong territory plan starts with the right questions. Ask them in your recruiter call and every interview, then research from there. The worksheet walks you through every step.

1 Know the Territory

Find out exactly what you'd cover: the states, regions, counties or cities. In startups especially, a territory can be very broad. Then ask the two questions that shape everything else:

> "Where is the existing business in the territory today?"

> "Where would you want me to focus first?"

Their answers give you a starting point: the area to research first, and the accounts to build from.

2 Know the Call Points

Who you'd actually call on: surgeons, physicians, therapists, nurses, practice managers, OR staff, purchasing or value analysis committees. Know who decides, who uses the product, and who influences the decision, and which facilities they work in.

3 Know the Sales Approach

How the product is sold: to physicians, to facilities, or both. How long the sales cycle is, what a first meeting usually looks like (a demo, an in-service, a lunch), who the competitors are, and what top reps on the team do differently.

4 Research the Map

Start where the existing business is and where the hiring manager wants you to focus. Look up the facilities and physicians in those areas and build a target list, existing customers first, then the best new opportunities.

5 Build Your Plan

How you'll learn, build relationships and generate activity, with weekly activity goals and how you'll know it's working. Specific beats impressive.

WHERE TO RESEARCH FACILITIES AND PHYSICIANS

- Google Maps: search the focus area for hospitals, surgery centers and clinics
- Hospital and practice websites: "Find a Doctor" pages and specialties
- Medicare's Care Compare (medicare.gov/care-compare): search clinicians and facilities by location and specialty
- LinkedIn: the team, current customers, competitor reps in the area
- The company's website, case studies and press releases
- Your recruiter and your interview notes

★ Make It Stand Out: Differentiators

Most candidates bring a list. Top candidates bring a plan that sounds like they already work there.

1 A Simple Territory Map

Drop pins on your target accounts (Google My Maps is free) and highlight the focus area and existing business. A one-glance visual is memorable.

2 Your First 10 Accounts, By Name

Name real facilities and, where you can, the physicians or departments you'd start with, and why each one is a priority.

3 A Weekly Call Plan

Show how you'd cover the ground: which areas on which days, how you'd group accounts to cut drive time, and when overnights make sense in a broad territory.

4 Leverage the Existing Business

Show how you'd grow from current customers: deepen usage, ask for referrals, and use their success to open doors nearby.

5 Solve a Challenge They Shared

Build in a solution to something you heard in an earlier interview, and say so: "When we spoke, you mentioned [challenge], so I..."

6 Know the Competition

Name the main competitors in the territory and how you'd position against them, respectfully and with facts.

KEEP IT HONEST

You won't know everything about the territory yet, and they don't expect you to. Use what you can find, make reasonable assumptions, and say what you'd confirm in your first weeks. That's exactly how they'll want you to think on the job.

A1

YOUR PREP SHEET

Know the Territory

Ask these in your recruiter call and interviews. Note who told you, so you can reference it when you present: "When we spoke, you mentioned..."

COMPANY / ROLE	PRODUCT / DEVICE	MY HOME BASE

ASK / FIND OUT	WHAT I LEARNED	SOURCE
What exactly does the territory cover? (states, regions, counties, cities)		
Is it a new territory, or am I taking over from someone? How was it covered before?		
Where is the existing business today? (accounts, cities)		
Where would the hiring manager want me to focus first, and why?		
How is the territory performing, and what are the goals for this role?		
How much travel? Any overnights? How are the miles usually covered?		
Who else on the team works this area, and how do we work together?		

MY TERRITORY SNAPSHOT In my own words: the ground I'd cover, where business is today, where I'd start

A2

YOUR PREP SHEET

Know the Call Points + the Sales Approach

FACILITIES I'D CALL ON

- [ ] Hospitals / health systems
- [ ] Ambulatory surgery centers
- [ ] Physician practices / clinics
- [ ] Physical therapy / rehab clinics
- [ ] Specialty centers
- [ ] Other:

WHO I'D CALL ON

ROLE / TITLE	DECIDES, USES OR INFLUENCES?	WHAT THEY CARE ABOUT MOST

ASK / FIND OUT	WHAT I LEARNED	SOURCE
How is the product sold: to physicians, to facilities, or both?		
How long is the typical sales cycle? Is there a value analysis or purchasing step?		
What does a first meeting usually look like? (demo, in-service, lunch, case coverage)		
Who are the main competitors in this territory?		
What do the top reps on this team do differently?		

A3

YOUR PREP SHEET

Research the Map

Start where the existing business is and where they want you to focus. Existing customers first, then the best new opportunities.

SOURCES I'VE CHECKED

- ☐ Google Maps search of the focus area
- ☐ Hospital and practice "Find a Doctor" pages
- ☐ Medicare Care Compare
- ☐ LinkedIn: team, customers, competitor reps
- ☐ Company case studies and press
- ☐ My recruiter and interview notes

MY TARGET ACCOUNTS

FACILITY	TYPE	CITY / AREA	PHYSICIANS / DEPARTMENTS	EXISTING?	WHY IT'S A PRIORITY

COMPETITORS IN THE TERRITORY + HOW I'D POSITION AGAINST THEM

A4

YOUR PREP SHEET

Build My Plan

HOW I'LL LEARN Product, competitors, territory data, riding with top reps

HOW I'LL BUILD RELATIONSHIPS Existing customers first, then my focus-area targets

WEEKLY ACTIVITY GOALS

ACTIVITY	WEEKLY GOAL	NOTES

MY WEEKLY CALL PLAN Which areas on which days; overnights if the territory is broad

HOW I'LL KNOW IT'S WORKING

MY DIFFERENTIATORS

- [ ] A simple territory map
- [ ] My first 10 accounts, by name
- [ ] A weekly call plan
- [ ] Growing from existing business
- [ ] A solution to a challenge they shared
- [ ] Competitive positioning

THE CHALLENGE I'LL SOLVE + HOW When we spoke, you mentioned...

A5

YOUR PREP SHEET

Bring It Together (With or Without AI)

You've done the asking and the research. Now pull it into one page. ChatGPT can help you organize it, using your notes from A1 through A4.

> **USING AI? USE IT WITH YOUR INFORMATION**
>
> AI can help you organize your plan, but it can't do the interviews for you. Hiring managers **will know** if you simply ask AI to generate a plan. Plug in only what **you** learned in **your** interviews and **your** research, then edit until it sounds like you. Your plan should be unique to your experience and to the conversations you had.

MY INTERVIEW INSIGHTS (THIS IS WHAT MAKES YOUR PLAN UNIQUE)

Turn each one into a line for your plan: "In my interview with [Hiring Manager], she mentioned that [specific clinic] lacked [what's missing], and they would love to have someone to [what they want]."

WHO SAID IT	ACCOUNT / AREA	WHAT'S MISSING OR THE CHALLENGE	WHAT THEY'D LOVE SOMEONE TO DO

YOUR CHATGPT PROMPT: COPY IT, THEN FILL IN EVERY [BRACKET] FROM YOUR WORKSHEET

> "I'm interviewing for a **[Role]** position with **[Company]**, selling **[Product / Device]**. Help me organize a one-page, high-level territory plan to present in my **[in-person / virtual]** interview. Use ONLY the information I give you. Do not invent accounts, physicians or facts, and flag anything I should verify.
>
> Territory (A1): **[what the territory covers]**. Existing business: **[where it is today]**. Where the hiring manager wants me to focus first: **[focus area + why]**. My home base: **[city]**. Travel: **[travel / overnights]**.
> Call points and sales approach (A2): **[who I'd call on and what they care about]**; **[how it's sold, sales cycle, first meeting, competitors]**.
> Target accounts I researched (A3): **[paste my target account list]**.
> What I learned in my interviews: **[paste my interview insights]**.
> My differentiators (A4): **[weekly call plan, growing existing business, the challenge I'll solve]**.
>
> Organize it into: (1) Territory snapshot, (2) Priority accounts and why, (3) How I'll learn, (4) How I'll build relationships, (5) Weekly activity goals and call plan, (6) How I'll measure success. Write in first person, in plain, confident language. Work in my interview insights by name, for example: 'In my interview with [Name], she mentioned that [clinic] lacked [X], so I plan to [Y].' Keep it to one page, and make it something I can walk through in 60 to 90 seconds."

Then: verify every facility, physician and fact on their own websites (AI can get these wrong), rewrite anything that doesn't sound like you, and practice presenting it out loud.

MY PLAN HIGHLIGHTS, IN MY OWN WORDS The 3 points I most want them to remember, including at least one interview insight

BEFORE YOU PRESENT

- [ ] Every facility and physician verified
- [ ] Includes at least 2 of my interview insights, by name
- [ ] Rewritten so it sounds like me, not AI
- [ ] In person: printed copies. Virtual: screen-share tested
- [ ] Practiced out loud: 60 to 90 seconds, 2 minutes max
- [ ] Ready to ask: "What would you add or change?"

B

Building Your 30-60-90 Day Plan

Show how you'd ramp: what you'll learn, who you'll build with, and what you'll deliver.

Each phase has a focus, a few specific goals, and a way to measure them. Example goals below; make yours specific to the company, product and anything you heard in your interviews.

DAYS 1 TO 30

Learn

- Complete product and company training
- Learn the CRM, processes and territory data
- Ride with top reps; meet key existing customers
- Learn the competitive landscape

Measure: e.g., Certified on the full product line by day 30

DAYS 31 TO 60

Build

- Take ownership of existing accounts
- Build relationships with key clinicians and staff
- Start prospecting new accounts
- Run first demos or in-services with support

Measure: e.g., Met with every top-10 account at least once

DAYS 61 TO 90

Generate

- Operate independently in the territory
- Build a healthy pipeline of opportunities
- Close first new business
- Set goals for the next quarter with my manager

Measure: e.g., First new account closed; pipeline of X opportunities

MAKE IT SPECIFIC

- Name the product, customer types and accounts where you can
- Tie goals to challenges you heard in earlier interviews
- Use numbers and time periods for measures

AVOID

- Generic goals that could apply to any job
- Promising results you can't support
- A long document. High-level wins.

KEY TAKEAWAY

Most candidates say they'll "hit the ground running." Your plan shows exactly how.

B

YOUR PREP SHEET

My 30-60-90 Day Plan

COMPANY / ROLE

PRODUCT / DEVICE

BY DAY 90, I WILL HAVE... The one outcome I want them to remember

DAYS 1 TO 30

LEARN

MY FOCUS

MY GOALS

1

2

3

HOW I'LL MEASURE IT

DAYS 31 TO 60

BUILD

MY FOCUS

MY GOALS

1

2

3

HOW I'LL MEASURE IT

DAYS 61 TO 90

GENERATE

MY FOCUS

MY GOALS

1

2

3

HOW I'LL MEASURE IT

YOUR PREP SHEET

Before You Present

- [ ] One or two pages, high-level
- [ ] Specific to this company and product
- [ ] Includes something I heard in an earlier interview
- [ ] In person: printed copies for each person
- [ ] Virtual: file open and screen-share tested
- [ ] Practiced it out loud: 60 to 90 seconds, 2 minutes max
- [ ] Ready to ask: "What would you add or change?"

B2

YOUR PREP SHEET

Bring It Together (With or Without AI)

Pull your phases into one page. ChatGPT can help you organize it, using your notes from the previous page.

USING AI? USE IT WITH YOUR INFORMATION

AI can help you organize your plan, but it can't do the interviews for you. Hiring managers **will know** if you simply ask AI to generate a plan. Plug in only what **you** learned in **your** interviews and **your** research, then edit until it sounds like you. Your plan should be unique to your experience and to the conversations you had.

MY INTERVIEW INSIGHTS (THIS IS WHAT MAKES YOUR PLAN UNIQUE)

Turn each one into a line for your plan: "In my interview with [Hiring Manager], she mentioned that [specific clinic] lacked [what's missing], and they would love to have someone to [what they want]."

WHO SAID IT	ACCOUNT / AREA	WHAT'S MISSING OR THE CHALLENGE	WHAT THEY'D LOVE SOMEONE TO DO

YOUR CHATGPT PROMPT: COPY IT, THEN FILL IN EVERY [BRACKET] FROM YOUR WORKSHEET

"I'm interviewing for a **[Role]** position with **[Company]**, selling **[Product / Device]** to **[call points]**. Help me organize a one-page, high-level 30-60-90 day plan to present in my **[in-person / virtual]** interview. Use ONLY the information I give you. Do not invent facts, and flag anything I should verify.

By day 90, I want to have: **[my one outcome]**.
Days 1 to 30, Learn: **[my focus, goals and measures]**.
Days 31 to 60, Build: **[my focus, goals and measures]**.
Days 61 to 90, Generate: **[my focus, goals and measures]**.
What I learned in my interviews: **[paste my interview insights]**.

Keep each phase to 3 or 4 specific goals with a measure and time period. Write in first person, in plain, confident language. Work in my interview insights by name, for example: 'In my interview with [Name], he mentioned [challenge], so in my first 60 days I will [action].' Keep it to one page, and make it something I can walk through in 60 to 90 seconds."

Then: verify every facility, physician and fact on their own websites (AI can get these wrong), rewrite anything that doesn't sound like you, and practice presenting it out loud.

BEFORE YOU GO

You've Got This

You now have everything you need to walk into your interviews with a plan that shows initiative, strategy and exactly how you think. Ask the right questions, do the research, and practice presenting it until it flows.

DID THIS WORKBOOK HELP YOU?

If it helped you build a stronger plan, stand out in an interview, or land an offer, I would be truly grateful for a LinkedIn recommendation. It helps the next candidate know this resource is worth their time.

1. **Connect with me on LinkedIn.**
   linkedin.com/in/carollee-lockwood-12751744
2. **Leave a recommendation from my profile.**
   Recommendations can only come from connections, so connect first.
3. **Share what changed for you.**
   A standout interview, a final round, an offer. Specifics help most.

KEEP GOING

Your plan sets you apart. The full Medical Sales Interview Prep E-Workbook shows you exactly when and how to present it, plus how to close every interview and ask for the job. Find it, plus my free Career Story Generator, Thank-You Follow-Up and LinkedIn Optimization resources, at **www.theprimeleadership.com**.

Rooting for you,

Carollee Lockwood
The Prime Leadership

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