THE
PRIME
LEADERSHIP

FREE RESOURCE

Breaking Into Medical Sales

For Early-Career Sales Professionals

Everything you've thought of, and everything you haven't: what you're up against, how to prove you belong, and how to land your first medical sales role.

INSIDE

PART 1 Know what you're up against, and whether it's right for you

PART 2 Your proof, your why and your plan

PART 3 How every Prime Leadership resource fits your next step

START HERE

Who This Is For

Early in your career, with some direct B2B sales experience, going after your first medical sales role.

Somewhere in between? The companion e-workbook, **Changing Industries Into Medical Sales**, is coming soon and will be free too.

THE TRUTH, UP FRONT

Medical sales is very competitive. Wanting it isn't enough. The candidates who get in know exactly what they're up against, and they show up with proof.

WHAT HIRING MANAGERS SCREEN FOR FIRST

DIRECT B2B SALES

Finding and closing your own deals.

QUOTA ATTAINMENT

Numbers, with time periods.

HUNTING ABILITY

Prospecting and new business.

PROVEN INTEREST

Research and preparation you can show.

THEY'RE ALSO READING YOUR TIMELINE

Hiring managers look for **patterns**: how long you stay, how often you move, and any gaps. Short stints or unexplained gaps raise the question, "Will this person stay?" Explain every transition honestly and briefly, add a Timeline Note for any gap of 2+ months, and list **months and years** for every role. Years alone can look like you're hiding a gap.

* Need help? My **Resume Optimization E-Workbook** walks you through dates, gaps and Timeline Notes, at www.theprimeleadership.com .

HOW TO USE THIS E-WORKBOOK

STEP 1

Read each section honestly.

STEP 2

Fill in the worksheet that follows it.

STEP 3

Go deeper with the tool each section points to.

STEP 4

Check off the final checklist before you go all in.

01 Know What You're Up Against

You're not competing against the job description. You're competing against the other finalists.

Medical sales roles attract a lot of applicants, and many of them look great on paper. Before you can stand out, you need to know who's standing next to you.

WHO ELSE IS APPLYING FOR THE SAME ROLE

1 Reps With Direct Medical Sales Experience
Including reps laid off from other medical companies, who already know the call points, the customers and the language.

2 B2B Reps With Years of Documented Quota Attainment
Rankings, President's Clubs and numbers they can prove.

3 Referred Candidates
People recommended by a current rep or manager. A referral can get your resume seen sooner, but it doesn't skip the line: referred candidates still have to qualify.

4 Candidates Who Already Did the Homework
Company, product and territory research, plus a polished story, before the first interview.

> **WHY IT'S HARD TO GET IN**
>
> A hiring manager is trusting you with physicians, patients and a territory that can be worth hundreds of thousands, often millions, in revenue. A wrong hire can cost them months of lost sales and customer trust. When in doubt, they hire proof.

WHAT THAT MEANS FOR YOU: SOFT SKILLS GET YOU NOTICED. PROOF GETS YOU HIRED.

Every candidate says they're coachable, driven and great with people. Hiring managers expect those soft skills. What takes you to the next level is showing them, with a result attached. **Stop describing your soft skills. Start proving them.**

WHAT EVERYONE SAYS	WHAT GETS YOU TO THE NEXT LEVEL
"I'm coachable."	My manager flagged my discovery calls. I rebuilt my questions, and my close rate went from 18% to 26% in one quarter.
"I'm driven."	60+ dials a day, 12 booked meetings a week, every week of 2025.
"I'm competitive."	#3 of 22 reps in 2025, up from #14 the year before.
"I build relationships."	Grew my top 3 accounts by 40% through quarterly business reviews.
"I'm a strong communicator."	Led 30+ product demos for buying committees of 3 to 6 people.

01

YOUR PREP SHEET

My Competition Reality Check

Compare yourself to a typical finalist. Be honest. Under each line is the tool that helps you close that gap.

WHAT FINALISTS USUALLY HAVE	I HAVE IT	NOT YET	MY PROOF, OR MY PLAN TO GET IT
Direct B2B sales experience **No B2B role yet? That's your next step.**	☐	☐	
Quota attainment with numbers and time periods **Tool: Resume Optimization E-Workbook (PAID)**	☐	☐	
Rankings, awards or promotions **Tool: Resume Optimization E-Workbook (PAID)**	☐	☐	
Prospecting and new business results **Tool: Resume Optimization E-Workbook (PAID)**	☐	☐	
A steady timeline: solid tenure, explained gaps **Tool: Resume Optimization E-Workbook (PAID)**	☐	☐	
Research on the company, its products and customers **Tool: Medical Sales Interview Prep E-Workbook (PAID)**	☐	☐	
A referral or connection at the company **Tool: LinkedIn Optimization E-Workbook (FREE)**	☐	☐	
A clear, practiced "why medical sales" **Tool: Career Story Generator (FREE)**	☐	☐	
A polished resume and LinkedIn profile **Tool: Resume Optimization + LinkedIn Optimization (PAID)**	☐	☐	
A territory or 30-60-90 day plan **Tool: 30-60-90 Day & Territory Plan E-Workbook (FREE)**	☐	☐	

MY BIGGEST GAP, AND WHAT I'LL DO ABOUT IT THIS MONTH

Free tools: **www.theprimeleadership.com/free-tools** Paid e-workbooks: **www.theprimeleadership.com**

02 Transferable Skills vs. Provable Experience

Transferable skills are valuable. They do not compare to actual, provable experience.

Every candidate says their skills transfer. Hiring managers don't hire potential when they can hire proof. The question isn't "Do my skills transfer?" It's "Can I prove it?"

THE PROOF LADDER: LEVEL 1 IS THE STRONGEST PROOF, LEVEL 5 THE WEAKEST

Level 1: Provable medical sales experience	You've already done the job.
Level 2: Direct B2B sales with documented quota attainment	The most common way in.
Level 3: B2B sales without a quota, with measurable results	Strong, if the results are specific.
Level 4: Customer-facing roles with measurable results	Retail, hospitality, service: harder, but possible with numbers.
Level 5: Transferable skills you can describe but can't prove	Valuable, but it rarely wins on its own.

THIS DOESN'T COUNT AS PROOF

> "I'm good with people."

> "My friend works at a hospital and can get me in the door."

> "My dad was in medical sales, so I know the job."

THIS DOES

- Numbers with time periods: "118% of quota in 2025"
- Rankings: "#2 of 24 reps"
- Promotions and awards
- No quota? The objectives you owned and how you measured up
- Never inflate a number. Estimating is fine; lying isn't.

HOW TO MOVE UP THE LADDER

Get documented numbers. If you're not in direct B2B sales yet, that is your next step: learning to sell, and proving it, beats anything else you could add. Collect recommendations that confirm your results. Every level you climb makes you harder to pass up.

02

YOUR PREP SHEET

My Proof Bank

List every skill you'll claim, with real proof. Then rate how strong that proof is using the Proof Ladder (Level 1 is strongest, Level 5 is weakest) and decide how you'll make it stronger. The first row is an example.

SKILL I'LL CLAIM	MY PROOF (NUMBER + TIME PERIOD)	LADDER LEVEL (1 TO 5)	HOW I'LL STRENGTHEN IT
Example: New business development	Closed 19 new accounts in Q3 and Q4 2022; 112% of quarterly quota	**2**	Add my 2023 numbers; ask my manager for a recommendation

MY SINGLE STRONGEST PIECE OF PROOF This leads my resume summary and my interview answers

Go deeper: the **Resume Optimization E-Workbook** (paid) turns your proof into a resume that competes, at **www.theprimeleadership.com** .

03 Is Medical Sales Right for You?

Know the job before you chase it.

Device, capital, disposables, surgical or pharma: every corner looks a little different, but the reps who last are ready for all of this.

BE READY FOR: YOUR DAY

- **Field days:** your car, clinics, hospitals and offices
- **Early mornings and late nights:** 6:30 a.m. starts, dinner programs
- **Weekends**, when a customer, case or event needs you
- **On-call and after-hours** support in some roles
- **Overnights:** big territories, training, sales meetings
- **Hours behind the wheel** between accounts
- **Clinical settings:** ORs, clinics, pharmacies, hospital floors
- **Cold calling** and unannounced office visits
- **Waiting rooms:** an hour for 2 minutes with a provider
- **Quick pivots:** plans moved, added or canceled
- **Lunch-and-learns** and in-services you run
- **Your trunk:** samples, marketing materials, sign-in sheets
- **Night admin:** CRM notes, email, tomorrow's plan
- **Gatekeepers** who turn you away, again and again

BE READY FOR: THE BUSINESS SIDE

- **A number you own**, month, quarter and year
- **Base plus commission;** comp plans can change yearly
- **A ramp period** before commission pays off
- **Rankings** against every rep on your team
- **Month- and quarter-end** pressure to close
- **Territory changes:** accounts split or taken away
- **Contracts and committees** that stall or cost you deals
- **Admin and compliance:** expenses, mileage, provider rules
- **Constant learning:** products, clinical terms, exams
- **Performance plans** if you miss your number

ENTRY-LEVEL AND ASSOCIATE ROLES ARE A GRIND

If you need a 9-to-5 schedule, medical sales is not for you. Expect long hours, long days, quick pivots and short lead times. A case or meeting moves, a customer needs you across the territory in an hour, a schedule you planned last night changes by 7 a.m.

And it doesn't change much once you promote into a Territory Manager role. Medical sales is not for the "I need a good work-life balance" type.

THE UPSIDE: WHY REPS WOULDN'T TRADE IT

- **Earning potential** tied directly to your results
- **Ownership:** your territory is your business
- **Autonomy:** deliver, and no one manages your hours
- **Purpose:** what you sell is used in patient care
- **Career growth:** associate to TM and beyond
- **Recognition:** rankings, President's Club and trips
- **No two days alike**
- **A skill set in demand** across specialties

The hard days are real, and so is the payoff. The reps who thrive go in with eyes open and build a career where their effort shows up in their paycheck and in patient care.

03 Remote vs. Work From Home

Let's get on the same page.

Before 2020, "remote" in sales meant you're out in the field. Since COVID, many people picture a laptop at the kitchen table. Medical sales didn't change with it, and that mix-up costs interviews.

TERM	WHAT MANY PEOPLE HEAR	WHAT IT MEANS IN MEDICAL SALES
Remote	*"I work from home."*	No office to report to. You live in your territory and work wherever the business takes you: hospitals, clinics, offices and your car. **Home is your base, not your workplace.**
Field-Based / Outside Sales	*"Some travel."*	Most of your week is out in the territory, face to face with customers. Your home office is for admin, when it isn't happening in your car.
Work From Home (WFH)	*"Same as remote."*	You work from your house only. Rare in medical sales; usually inside sales, customer service or support roles.
Inside / Virtual Sales	*"Remote sales."*	Selling by phone and video, often from an office or home. A different role than field sales, with a different career path.

YOUR CAR IS YOUR OFFICE

Calls, email and CRM notes happen between accounts, parked. Never while driving: pull over, park, then work.

A SMALL TERRITORY STILL MEANS BIG DAYS

Less driving doesn't mean less work. Expect the same long hours, quick pivots and short lead times.

WANT LESS WINDSHIELD TIME?

If a broad territory is a dealbreaker, you're probably looking for an **inside sales** role. That's okay; know it now.

READ THE JOB POSTING LIKE A RECRUITER

- **"Remote" plus a list of cities** = field-based: you live in that territory and work it daily. **"Home-office based"** = no corporate office, not a desk job.
- **"Up to 50% overnight travel"** = up to half your nights away from home.

DON'T SAY

- "I'm looking for a remote role so I can work from home."
- "I want the flexibility of remote work."
- "I want better work-life balance."

SAY AND ASK INSTEAD

- "I'm looking for a field-based role where I own my territory."
- "How much of a typical week is in the field vs. the home office?"
- "How much overnight travel should I expect?"

KEY TAKEAWAY

Rarely home, your car as your office, and a territory that's all yours. For the right person, that's the appeal.

03

YOUR PREP SHEET

My Honest Gut Check

These are the things most candidates never get the chance to think about until they're in the job. This page isn't here to talk you into medical sales. No one sees your answers but you.

BE HONEST	YES	NOT SURE	NO
I'm okay starting some days at 5 a.m. and finishing others at 8 p.m.	☐	☐	☐
I'm okay making calls and doing admin parked in my car between accounts.	☐	☐	☐
I'm okay with a schedule I planned last night changing by 7 a.m.	☐	☐	☐
I'm okay working some evenings and weekends when a customer needs me.	☐	☐	☐
I'm okay being away overnight, including weeks of training.	☐	☐	☐
I'm okay being turned away by the same office many times before I get in.	☐	☐	☐
I'm okay being ranked against my teammates, every month.	☐	☐	☐
I'm okay with my income rising and falling with my results.	☐	☐	☐
I'm okay with a ramp: my first months may pay less than I expect.	☐	☐	☐
I'm okay if my territory, comp plan or products change after I've built them up.	☐	☐	☐
I'm okay keeping my car stocked and organized as my office and warehouse.	☐	☐	☐
I'm okay that a small territory still means long days and quick pivots.	☐	☐	☐
I'm willing to start at an associate title if that's my way in.	☐	☐	☐
My family or support system understands what this schedule means.	☐	☐	☐

WHAT YOUR ANSWERS MEAN

Mostly yes? Keep going. **Several "not sure" or "no" answers?** Pause and think hard before you go all in. That isn't failure. It's clarity, and it can save you from a role you'd resent. **Financially motivated?** Good. Medical sales rewards that. Just know the money follows the work, and the work comes first, every day.

WHAT I ANSWERED "NOT SURE" OR "NO" TO, AND WHAT IT WOULD TAKE TO CHANGE THAT

04 Why Medical Sales?

You'll be asked in every interview, often more than once.

Hiring managers absolutely care whether you want to help patients, and the best ones can see it in your demeanor and the choices you've made. But caring isn't what sets you apart. Nurses, clinicians, moms and dads all love helping people. The real question is: **can you sell? Lead with the business. Let the heart come through.**

WHAT EVERYONE SAYS (AND WHY IT FALLS FLAT)

WHAT EVERYONE SAYS	WHY IT FALLS FLAT	GO DEEPER (BUSINESS FIRST)
"I want to help people."	It's true for a lot of people. Nurses, clinicians, moms and dads love helping people too. The question is: can you sell?	What about selling in healthcare drives you? Then, how does your selling help patients?
"I've always been interested in healthcare."	Interest without action is a wish.	What have you done about it? Then, what about the healthcare sales model fits how you sell?
"My friend / family member is in medical sales."	It explains how you heard about it, not why you'd be good at it.	What did they show you about the job that matches how you sell?
"I want a more meaningful career."	Vague, and it implies your current work isn't meaningful.	Name the result you want to drive, then what makes it meaningful.
"The earning potential."	Being financially motivated is a strength in sales. On its own, though, it doesn't answer "why medical?"	Pair it with what drives your earning, and why here: competition, results, building something.
"I'm passionate about medicine."	"Passion" is a claim. Recruiters hear it all day.	Show how your selling already fits healthcare. *Example: "In logistics sales, I learned my warehouse buyers' busiest hours and called around them. In healthcare, that's learning a clinic's procedure days and showing up when the office manager can actually talk."*

REASONS THAT RESONATE Pick what's true for you, then back it with proof.

- **"I want my results to matter beyond a spreadsheet."** What you sell helps someone get diagnosed, treated or home sooner.
- **"I want to be the expert in the room."** Clinicians rely on reps who know their product cold.
- **"I want to earn trust with people whose time is precious."** Winning a provider's ten minutes means something.
- **"I want to own something and build it."** A territory is yours to grow.
- **"I want my effort to be rewarded."** Medical sales pays for results, and results are yours.
- **"I want a career, not a job."** There's a real path to grow, and a skill set that lasts.

THEN LET THE HEART COME THROUGH

Your care for patients should already show in how you carry yourself and the choices you've made. If you have a real story about an experience that moved you, share it. It's valuable. One specific, true sentence beats a paragraph: "...and knowing that when I win the account, patients recover faster, makes the grind worth it."

THE FORMULA

[The business reason] + [My proof I can win at it] + [The patient impact that makes it meaningful] + [Why this company].

EXAMPLE: B2B PAYROLL SALES

"I want a sale that's more consultative and more competitive than what I'm doing now. In B2B payroll sales I hit 118% of quota in 2025 by educating owners on problems they didn't know they had, and medical sales takes that further: you're educating providers and administrators in the same deal. Knowing my work would show up in patient care is what makes this the career I want. Your growth in [specialty] is why I'm here."

EXAMPLE: FREIGHT AND LOGISTICS SALES

"In freight sales, I learned that when a shipment is late, someone downstream pays for it, so I built my book of business on being the rep who never let that happen: #2 of 15 reps in 2025. In healthcare, when a product isn't there, a patient waits. I want my reliability to matter at that level, and I want to earn it in a territory I own."

EXAMPLE: OFFICE TECHNOLOGY SALES

"I've sold copiers and managed print to small businesses for two years, finishing #3 of 18 reps last year, mostly by getting past front desks that didn't want to see me. I'm best when a customer relies on me to solve a problem fast. When my grandmother had her knee replaced, I watched how much the right product mattered, and I want to be the rep a provider relies on like that."

KEY TAKEAWAY

Lead with the business, prove you can win it, and let your care for patients be the reason you'll never quit.

04

YOUR PREP SHEET

My Why

MY EASY ANSWER (WHAT EVERYONE SAYS) Write it down so you can move past it

1. THE BUSINESS REASON What about selling in healthcare drives me?

2. MY PROOF I CAN WIN AT IT Numbers, rankings, results

3. THE PATIENT IMPACT THAT MAKES IT MEANINGFUL A real story or one specific sentence

4. WHY THIS COMPANY Specific to each company I interview with

MY FINAL ANSWER, BUSINESS FIRST (UNDER 60 SECONDS)

PRACTICED OUT LOUD

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8

05 Know the Landscape

"Medical sales" isn't one job. Know which part of it you're going after.

SEGMENTS

SEGMENT	WHAT IT'S LIKE
Medical Device	Implants, instruments, monitors and wearables; physicians, surgeons and clinical staff
Surgical / OR	Case coverage, early mornings, working alongside surgeons and OR staff
Orthopedics / Spine	Implants, bracing and biologics; surgeons, ASCs and hospitals
Cardiovascular / Neurovascular	Stents, valves, rhythm management; cath labs and specialists
Capital Equipment	Imaging, robotics, beds and large systems; long cycles, committees and budgets
Hospital Disposables / Med-Surg Supplies	High-volume single-use products; nursing, supply chain and contracts
Durable Medical Equipment (DME)	Braces, mobility and home equipment; clinics, DME suppliers and patients
Diagnostics / Lab	Tests, analyzers and lab services; lab directors and clinicians
Wound Care / Biologics	Dressings, skin substitutes, therapies; wound clinics, hospitals, long-term care
Pharma / Biotech	Prescription drugs and specialty therapies; prescribers, often structured call cycles
Specialty Pharmacy / Infusion	Complex therapies; specialists, infusion centers and access teams
Healthcare IT / Software	Records, scheduling, analytics; administrators, IT and clinical leaders
Dental / Ophthalmic / Aesthetics	Specialty practices: dentists, eye care, dermatology and med spas
Distribution	Many manufacturers' products in one bag; often 1099 or independent reps

COMMON ROLE LEVELS

ASSOCIATE / APS

The most common way in. You learn alongside a senior rep before owning a territory.

INSIDE SALES

Phone and video selling. A common entry path at some companies.

TERRITORY MANAGER / SALES REP

You own a territory and a number.

CLINICAL SPECIALIST

Clinical support and education, often a clinical background.

WHO AND WHERE YOU'LL SELL: COMMON CALL POINTS

- Surgeons and specialty physicians (ortho, cardio, neuro, GI, urology and more)
- Primary care physicians (PCPs)
- Physician assistants (PAs) and nurse practitioners (NPs)
- Nurses, nurse managers and OR staff
- Practice and office managers
- Hospital C-suite (CEO, CFO, COO, CNO) and department directors
- Purchasing, supply chain and materials management
- Value analysis committees (VACs)
- GPOs and IDNs (health system contracting)
- Hospitals and ambulatory surgery centers (ASCs)
- Federal facilities (VA medical centers, military and IHS)
- Pharmacies and pharmacists
- Labs and lab directors
- Therapy clinics (physical, occupational, speech)
- DME suppliers, orthotics and prosthetics
- Long-term care, home health and hospice
- Wound clinics and infusion centers
- Biomedical / clinical engineering and IT (capital and software)

HOW TO PICK YOUR SEGMENTS

IF YOU...	LOOK AT...
Thrive on early mornings, adrenaline and being needed in the moment	Surgical / OR medical device, orthopedics, cardiovascular
Love strategy, long deals and big numbers	Capital equipment, healthcare IT
Like high activity, many customers and fast wins	Office- and clinic-based medical device, DME, distribution
Prefer structure, routine call cycles and science-heavy conversations	Pharma, biotech, diagnostics
Want to see patient impact up close	Medical device, wound care, DME, therapy-focused products

KEY TAKEAWAY

You don't need to know your perfect segment yet. You do need a reason for each one you pursue, because "I'm open to anything in medical sales" tells a hiring manager you haven't done the research.

SPEAK THE LANGUAGE

You don't need to know all of these before your first interview. You do need to recognize them when a hiring manager uses them.

TERM	MEANING
Account / Key Account	A customer you manage; key accounts drive the most revenue.
ASC	Ambulatory surgery center: outpatient surgery outside the hospital.
Bill-Only / Consignment	Product kept on a customer's shelf and billed only when used.
Book of Business	The accounts and revenue you manage.
Call Cycle	How often you visit each customer, common in pharma.
Call Points	The people and places you sell to.
Capital vs. Disposables	Big one-time purchases vs. products used up and reordered.
Case Coverage	Supporting a surgeon during a procedure that uses your product.
Clinical Evaluation / Trial	A short trial of your product before a customer commits.
CPT / HCPCS Codes	Billing codes that tie a product or procedure to payment.
Credentialing	Approval reps complete before entering a hospital (often through Symplr, Vendormate or RepTrax).
DME	Durable medical equipment: braces, mobility and home equipment.
Field Ride	A day in the field with a manager or rep, often part of interviews.
FDA Clearance / 510(k)	How many devices are cleared to be sold in the U.S.
Formulary	The list of drugs or products a hospital or plan has approved.
GPO	Group Purchasing Organization: negotiates contracts for many hospitals.

TERM	MEANING
IDN	Integrated Delivery Network: a health system that buys as one.
In-Service	Training clinical staff on how to use your product.
KOL	Key Opinion Leader: an influential physician other clinicians follow.
Off-Label	Use not approved by the FDA. Reps may not promote it.
PAR Level	The stock level a customer keeps on the shelf.
Payers	Who pays: insurers, Medicare and Medicaid, workers' compensation and veterans' benefits.
Prior Authorization	Insurance approval required before a product or drug is covered.
Purchase Order (PO)	The customer's official order to buy.
Quota	The sales number you're measured against.
Ramp	The time it takes a new rep to reach full productivity.
Reimbursement	How a provider gets paid for using your product. It can make or break a sale.
Ride-Along	Spending the day with a rep to see the job.
Sunshine Act / AdvaMed / HIPAA	Rules on payments to physicians, ethical interactions and patient privacy.
Territory	The geography or accounts you're responsible for.
Tier Pricing / Contract Price	Negotiated pricing based on volume or agreements.
VAC	Value Analysis Committee: approves new products for a hospital.

05

YOUR PREP SHEET

My Targets

SEGMENTS THAT FIT ME

SEGMENT	WHY IT FITS MY BACKGROUND

ROLE LEVELS I'M TARGETING

- ☐ Associate / APS
- ☐ Inside Sales
- ☐ Territory Manager / Sales Rep
- ☐ Other:

MY 10 TARGET COMPANIES

#	COMPANY	SEGMENT / PRODUCT	WHY THEM / WHO I KNOW THERE
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

06

What You've Never Thought Of

The things that surprise candidates, often after it's too late. (General information, not legal or financial advice.)

YOUR CURRENT JOB

- **Non-compete and non-solicit agreements.** Read what you signed before you apply. If you're unsure, have an employment attorney review it.
- **A confidential search.** Set #OpenToWork to recruiters only. Keep your search off company devices and email.
- **References.** Line them up early, especially if your manager doesn't know you're looking.

GETTING HIRED

- **The process takes time.** 3 to 6 rounds are common, including a field ride and a presentation. Keep applying.
- **Background check, drug screen and driving record.** You'll drive a lot. A poor driving record can be a dealbreaker.
- **Hiring slows** around the holidays and fiscal year-end. Plan for it.

GETTING INTO HOSPITALS

- **Vendor credentialing.** Many hospitals require it before you can enter: background checks, immunization records, training modules.
- **OR protocols.** Sterile fields, attire and staying out of the way.
- **Industry rules.** HIPAA (patient privacy), the AdvaMed Code (ethical interactions with healthcare professionals) and the Sunshine Act (payments to physicians are publicly reported).

THE JOB ITSELF

- **Physical demands.** Early mornings, long days on your feet, and lifting equipment or product in some roles.
- **Your car.** Company car or car allowance, mileage, and a reliable vehicle.
- **Training.** Often weeks at headquarters, with product exams you're expected to pass.
- **Associate roles.** Promotion to a full territory may depend on relocating. Ask up front.

THE MONEY

- **Comp plans vary widely:** base vs. commission mix, capped vs. uncapped, ramp guarantees, clawbacks and expense reimbursement.
- **1099 and commission-only roles.** They can be legitimate, but they're very different from a W-2 salaried role. Know which one you're signing.
- **Your first year:** commission can take time to build. Budget around your base.

YOUR LIFE AND IMAGE

- **Your support system.** Travel, on-call and early mornings affect your family too.
- **Your online presence.** Hiring managers look you up. Review what's public.
- **First impressions.** Facial piercings: best practice is to remove them for a client-facing role.
- **Rescheduling.** Avoid it, especially with a hiring manager. The role may not wait.

06

YOUR PREP SHEET

My "Never Thought Of" Checklist

- [ ] Read my non-compete / non-solicit
- [ ] Set #OpenToWork to recruiters only (if employed)
- [ ] Lined up 3 references
- [ ] Prepared for a 3 to 6 round process
- [ ] Confident in my background check and driving record
- [ ] Know what vendor credentialing involves
- [ ] Know what HIPAA, AdvaMed and the Sunshine Act are
- [ ] Ready for the physical demands
- [ ] Reliable vehicle
- [ ] Ready for training away from home
- [ ] Know to ask about associate-to-territory relocation
- [ ] Understand base vs. commission vs. bonus
- [ ] Know the difference between 1099 and W-2 roles
- [ ] Have a financial plan for my first year
- [ ] Support system is on board
- [ ] Reviewed my public social media
- [ ] Ready to present myself for a client-facing role
- [ ] Committed to not rescheduling

QUESTIONS I NEED ANSWERED BEFORE I ACCEPT AN OFFER

NOTES

07 Your Resume, Built to Compete

The highlights from the Resume Optimization E-Workbook.

1 A Professional Summary, In Bullets
How you sell, quota proof, recognition (always here), and a truly different differentiator. You're not the only athlete.

2 A Context Line for Every Role
What you sold and who you sold to.

3 Numbers With Time Periods
"$850K /yr," not "$850K." No quota? Objectives owned and how you measured up.

4 Months and Years, Plus a Timeline Note for Gaps
Any gap of 2+ months that isn't obvious gets a short, honest note, last in the role that follows it.

5 Clean and Focused
1 page, 2 max for entry-level and associate roles. City and state. No GPA or objective.

PAID

Resume Optimization E-Workbook
A fillable worksheet, a sample resume and every rule above, step by step.
www.theprimeleadership.com

08 Your LinkedIn, Built to Be Found

Highlights from the free LinkedIn Optimization E-Workbook.

FIRST IMPRESSION

- A professional, realistic headshot
- Headline: [Role] + [Industry] + [Proof]
- Passes the 10-second test

SEARCHABILITY

- Skills from job descriptions, not traits
- City and state (+ relocation plan)
- #OpenToWork set to fit your situation

CONSISTENCY + CREDIBILITY

Companies, titles, dates and numbers match your resume exactly (how you present them can differ). Ask for 2 or 3 recommendations covering results and character.

FREE

LinkedIn Optimization E-Workbook
Headline formulas, an About section builder and a profile checklist.
www.theprimeleadership.com/free-tools

09 Applying, Recruiters and Ghosting

Be intentional about how you apply, not just where.

WHERE TO FIND MEDICAL SALES ROLES

- LinkedIn Jobs, with alerts for your titles and city
- MedReps and other medical sales job boards
- Career pages of your 10 target companies
- Recruiters who specialize in medical sales
- Reps and managers in your network

APPLY WITH INTENTION

- Read the whole posting, especially location and must-haves
- Match your resume to its language, honestly
- Apply early: the first week or two of a posting
- Then reach out to the recruiter or hiring manager on LinkedIn

FREQUENT MISTAKES

- Applying to everything ("spray and pray")
- Not reading the job description
- Ignoring location requirements
- Not meeting basic qualifications
- Applying, then never following up

RECRUITER VS. COMPANY LINK

Want a recruiter to represent you? Don't apply directly first.

Ask: "Do you submit candidates directly to the hiring manager, or are you working with a recruiting partner?"

WORKING WITH RECRUITERS

- Respond the same day
- Be honest about location, timing and pay expectations
- Keep them updated when anything changes
- One recruiter per opportunity: the first one who told you about it. Already know about it? Say so.

KEEP RECORDS

Log every application: date, company (or recruiting firm), role, contact, status and next step.

Never say "I've applied to so many." Say, "Let me check my records."

GHOSTING: IT'S PART OF THE GAME

You're going to get ghosted by recruiters, by reps you reach out to, and by hiring managers, sometimes after a great interview. It doesn't matter why. Don't take it personally, and don't let it stall your search. **Do your follow-up. Stay professional. Move on.**

IT'S A BIG INDUSTRY, BUT A SMALL NETWORK

Recruiters and hiring managers talk. How you show up with one, including how you handle being ghosted, can follow you to the next. What they're saying about you, and how to make sure it's good, is in the **Medical Sales Interview Prep E-Workbook** at www.theprimeleadership.com .

10 Your Career Story

You'll tell it at the start of almost every interview. It should flow back to where you are now.

STEP 1
Set the Context
Where you're starting from, in 10 to 15 seconds.

STEP 2
Your Path, In Order
Your roles in order, with results. Address any gap before anyone asks.

STEP 3
Loop Back to Now
"Which brings me to where I am now..."

STEP 4
Close With Your Why
Your business-first why, with the heart behind it.

EXAMPLE: ABOUT 90 SECONDS

> "I grew up working in my family's restaurant, so talking to strangers and staying calm under pressure came early. After graduating from [University] in 2022, I joined [Company] selling payroll software to small businesses. My first year I finished #6 of 20 reps. By 2024 I was #2, at 121% of quota, mostly from new business I prospected myself. Along the way I noticed my best deals came from teaching customers about problems they didn't know they had, and that's the heart of medical sales. Which brings me to where I am now: I'm ready to take that into a sale where the outcome is patient care, and that's why this role stands out to me."

HOW LONG?

- 30-minute call: 90 seconds to 2 minutes
- 60-minute interview: 2 to 3 minutes

EARLY-CAREER TIP

Not much sales history yet? Lead with your strongest results, wherever they came from, and let your preparation for medical sales carry the story.

WHERE STORIES GO WRONG

- Starting in high school, or reading your resume line by line
- No numbers, so nothing sticks
- Skipping a gap and hoping no one notices
- Talking negatively about a past manager or employer
- Never looping back to why you're in this interview

Don't know how to tell your story? Don't even know where to begin?

That's exactly what the free **Career Story Generator** is for. Enter short notes for each step, and it weaves them into a natural, spoken story timed to your call length. Then practice it out loud until you can tell it without notes.

www.theprimeleadership.com/free-tools

11 The Interview Gauntlet

Every stage is an interview, and every stage has a goal.

STAGE 1
Recruiter Screen
Goal: get moved forward to the hiring manager.

STAGE 2
Virtual Interview
Goal: show you can represent the company.

STAGE 3
In-Person / Field Ride
Goal: show you're already operating at their level.

STAGE 4
Final
Goal: bring it together and ask for the job.

IT'S NOT "JUST" A SCREENING CALL

Recruiters advocate for you. They're summarizing your demeanor, how you talk about your employer, the maturity of your answers, and whether you closed and followed up.

RESPECT THE TIME

Concise answers, and watch the clock. Running long signals low social awareness. Answer, add one proof point, stop.

FIELD RIDES

Arrive 15+ minutes early. Confirm attire first. Read the room, know when to engage and when to observe, and treat every staff member like the decision-maker.

THE FINAL INTERVIEW FLOW

Your plan, then a solution to a challenge they shared earlier, then ask for the job. Everything you gathered in earlier interviews comes together here.

YOUR QUESTIONS SAY MORE THAN YOUR ANSWERS

FORGETTABLE	MEMORABLE
"What does a typical day look like?"	"You mentioned [account] is the territory's biggest opportunity. What has kept it from growing, and what would you want a new rep to try first?"
"What's the company culture like?"	"What separates the reps who get promoted here from the ones who don't?"

WANT ALL THE HELP?

The **Medical Sales Interview Prep E-Workbook** covers everything on this page, plus what most candidates never prepare for:

- A prep sheet for every stage, from the recruiter call to the final
- How to ask thoughtful, meaningful questions that make hiring managers remember you
- Scripts for your story, your why, tough questions and your close
- Field ride and final presentation prep, plus FAQs

PAID www.theprimeleadership.com

12 Close and Follow Up Like It's Sales

Because it is. You're interviewing for a job where closing IS the job.

EVERY INTERVIEW ENDS WITH A CLOSE. NO EXCEPTIONS.

Hiring managers are hiring someone to ask physicians for the business. If you won't ask them for the next step, they'll assume you won't ask their customers either.

YOU KNOW THE NEXT STEP (BEST)

Find it out **before** the interview. Ask the recruiter or scheduler: "What's the next step after this interview, and who is it with?" Then close hard on that exact step:

> "Based on everything we talked about, I'm confident I can [their need]. I know the next step is a field ride with [Name]. I'd love to get that on the calendar. I'm open Tuesday or Thursday. Which works better?"

YOU DON'T KNOW THE NEXT STEP

Then ask, **and still close on it.** Asking alone is not a close.

> "What's the next step in your process?"

> "Great. I'd love to move forward to that. Can we get it scheduled now? I'm open Tuesday or Thursday."

ASK ABOUT HESITATIONS. ADDRESS THEM HEAD ON.

Before you close, ask: **"Is there anything about my background that would keep you from moving me forward?"** Then acknowledge it, answer it with proof, and close again.

> "That's fair. I haven't sold to surgeons yet. In my current role I went from zero accounts to #3 of 22 reps in 18 months by learning a new customer fast, and I'd ramp the same way here. Does that address your concern? Then I'd love to get the field ride scheduled."

STRONG VS. SOFT

SOFT (DON'T)	PLEASANTLY ASSERTIVE (DO)
"What are the next steps?" ...and nothing else	"What's the next step? Great, let's get it on the calendar. Does Tuesday or Thursday work?"
"I hope to hear from you soon."	"I'm confident I'm the right fit, and I'd like to move forward. What would keep that from happening?"
"Thanks for your time."	"Thank you. Based on today, is there any reason you wouldn't move me to the next round?"

FOLLOW-UP IS NON-NEGOTIABLE.

Follow up with every person you speak with (recruiter, hiring manager, rep, field ride) immediately after, by email, the same day. If you don't, the perception is that you're not excited enough, not interested enough, or not the right fit, because they need reps who follow up with physicians immediately. **Your follow-up is a preview of how you'll treat their customers.**

CAPTURE THE DETAILS

A voice memo app (with permission) lets you stay present. Paste the transcript into an AI tool to pull out what to mention, then write the email in your own words: thanks, one memorable detail, one proof point, any hesitation answered, and the next step with dates.

WHO GETS A FOLLOW-UP, AND WHEN

AFTER...	SEND...
A recruiter call	A short email within the hour: thanks, your interest, and your availability for the hiring manager
A hiring manager or final interview	A same-day email that addresses any hesitation and asks for the next step (or the job) with dates
A field ride	Same-day emails to the manager **and** the rep you rode with, each with something specific from the day

EXAMPLE: SAME-DAY FOLLOW-UP

Subject: Thank you, [Name]: next steps for the [Role]

Hi [Name],

Thank you for your time today. Your point about [specific detail] stuck with me, because it's exactly the kind of challenge I took on at [Company] when I [one proof point with a number].

You mentioned [hesitation]. [One sentence that answers it with proof.]

I'm excited about the field ride with [Name]. I'm available Tuesday the 14th or Thursday the 16th. Which works best?

Best,
[Your Name] | [Phone]

FREE

Thank-You Follow-Up E-Workbook
Templates and an email builder for every stage of the interview.
www.theprimeleadership.com/free-tools

13 Your Plan Sets You Apart

It isn't required. That's exactly why it works.

For entry-level and associate roles, a territory plan isn't a required step. It's how you differentiate yourself from every other finalist. But it only helps if you do the work: research the company, ask the right questions, and figure out how you'd solve what they need in a rep.

RELEVANT

Built from what they told you this role needs, not a template.

REALISTIC

Activity a new rep can actually deliver during ramp.

OPEN TO DIRECTION

"This is my starting point. I'll adjust with your guidance."

ASK IN YOUR INTERVIEWS

- "What does success look like in this role in the first 90 days?"
- "Where is the existing business, and where is the biggest opportunity?"
- "What is the biggest challenge in this territory right now?"
- "What do your top reps do differently?"
- "How would you want a new rep to spend the first month?"

WHERE TO DO YOUR RESEARCH

- The company's website, product pages and press releases
- LinkedIn: reps and managers in the territory, and what they post
- Hospitals, surgery centers and clinics in the territory, and who they serve
- Industry news on the company and its competitors
- The job posting itself: every requirement is a clue
- Your own interviews: write down every challenge they mention

WHAT A STRONG TERRITORY PLAN INCLUDES

SECTION	WHAT GOES THERE
Territory Snapshot	The geography, key accounts and call points, from your research and their answers
Target Accounts	Where you'd focus first, and why, tied to what the manager told you
Activity Plan	Realistic weekly calls, visits and in-services for your first 30, 60 and 90 days
Learning Plan	How you'll learn the products, the customers and the competition fast
Where I'll Ask for Direction	The decisions you'll make with your manager, not without them

MAKE IT YOURS: AN AI PROMPT FOR ONCE YOU HAVE THE ANSWERS

AI PROMPT: COPY, PASTE AND FILL IN THE BRACKETS

```
I interviewed for a [role] at [company], selling [product] to [call points] in [territory]. Here are my notes from my interviews: [paste what they told you: existing accounts, focus areas, challenges, what top reps do]. Here is my background: [paste 3 or 4 resume bullets]. Using ONLY this information, outline a one-page territory plan with: 1) my top 3 priorities for the first 90 days, tied to what the manager said; 2) the account types I'd target first and why; 3) realistic weekly activity goals for a new rep; 4) how I'll learn the products fast; 5) where I'll ask for my manager's direction. Do not invent numbers or facts. Flag anything I should confirm.
```

Then rewrite it in your own words. Hiring managers can spot a generic plan, and they'll ask you about every line.

SHORT ON INFORMATION? AN AI PROMPT THAT ASKS YOU THE QUESTIONS

AI PROMPT: COPY, PASTE AND FILL IN THE BRACKETS

```
I'm interviewing for a [role] at [company], selling [product] to [call points] in [territory]. I don't have much information yet. Ask me 10 questions, one at a time, that will help me research and think through a realistic territory plan on my own. Do not write the plan for me.
```

This keeps the thinking yours. Think outside the box: company news, product pages, the hospitals and clinics in the territory, and what you learned in each interview.

PRESENT IT WELL

- **Lead with their words:** "You told me [challenge], so my plan starts there."
- **One page, two minutes, eyes up.** Printed copies in person; screen share tested if virtual.
- **End open, then close:** "This is my starting point. What would you add or change?" Then ask for the next step.

FREE

30-60-90 Day & Territory Plan E-Workbook
Build either plan step by step, with examples and a one-page template.
www.theprimeleadership.com/free-tools

YOUR NEXT STEPS

Every Resource, In the Order You'll Need It

Each one picks up where the last leaves off.

1. **Breaking Into Medical Sales** FREE
   You are here. Know what you're up against, your why, your proof and your plan.
2. **Changing Industries Into Medical Sales** COMING SOON
   The companion workbook, if you're somewhere in between. It will be free too.
3. **Resume Optimization E-Workbook** PAID
   A resume that competes: bullet summary, numbers, context lines, Timeline Notes.
4. **LinkedIn Optimization E-Workbook** FREE
   A profile built to be found and to pass the 10-second test.
5. **Career Story Generator** FREE
   Your story, timed and ready to say out loud.
6. **Medical Sales Interview Prep E-Workbook** PAID
   Every stage, from the recruiter call to asking for the job, plus how to ask questions that stand out.
7. **Thank-You Follow-Up E-Workbook** FREE
   A same-day email that asks for the next step.
8. **30-60-90 Day & Territory Plan E-Workbook** FREE
   The plan that sets you apart in later interviews.

FREE TOOLS

www.theprimeleadership.com/free-tools

PAID E-WORKBOOKS

www.theprimeleadership.com

COMING SOON

- **Relocating for a Medical Sales Role**
- **Handling Verbal and Written Offers**
- **Networking on LinkedIn**

Want to know when they're ready? **Register at** www.theprimeleadership.com and I'll email you when new resources are available.

Ready to Make the Move

Check every box before you go all in.

KNOW

- [ ] I know who I'm competing against
- [ ] I know where my proof sits on the Proof Ladder
- [ ] I know the grind and the upside, and I still want it
- [ ] I know "remote" means field-based, with my car as my office
- [ ] I know my target segments, roles and companies
- [ ] I've worked through my "Never Thought Of" checklist

PROVE

- [ ] My Proof Bank is full, with numbers and time periods
- [ ] Every soft skill I claim has a result attached
- [ ] My resume and LinkedIn are updated and match
- [ ] Every gap and transition is explained
- [ ] I've researched each company's products and customers

SAY IT

- [ ] My why is business first, with real care for patients
- [ ] My career story is practiced out loud
- [ ] I find out the next step before each interview
- [ ] I close hard on the next step, and ask about hesitations

FOLLOW THROUGH

- [ ] I follow up immediately after every conversation
- [ ] I'm applying with intention, not to everything
- [ ] I stay professional and move on if I'm ghosted
- [ ] If I build a plan, it's relevant, realistic and open to direction

KEY TAKEAWAY

Most candidates want it.

Strong candidates prepare for it.

TOP CANDIDATES KNOW WHAT THEY'RE UP AGAINST, SHOW UP WITH PROOF, AND CLOSE.

BEFORE YOU GO

You've Got This

You now know what you're up against, what you've never thought of, and exactly how to prove you belong. Build your proof, practice out loud, close every conversation, and follow up every time.

DID THIS WORKBOOK HELP YOU?

If it helped you get clear on your move, land interviews, or break into medical sales, 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 first interview, a field ride, an offer, your first medical sales role. Specifics help most.

KEEP GOING

This is the first step. The Resume Optimization and Medical Sales Interview Prep E-Workbooks take you from the application to asking for the job. Find them, plus my free Career Story Generator, LinkedIn Optimization, Thank-You Follow-Up and 30-60-90 Day & Territory Plan resources, at **www.theprimeleadership.com**.

Rooting for you,

Carollee Lockwood
The Prime Leadership

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