

Symmetry Surgical

Running an Evaluation

ORC PORTFOLIO



symmetry surgical®

Running an Evaluation

Post Approval

Pre-Eval Determination & Preparation

Clinical Evaluation

Conversion

Post-Conversion

Post Approval / Pre-Eval Determination

Do you need to move forward with Product evaluation?

If yes- move to next step

If no, Move to step 4... But make sure that you are driving home the value proposition of our products with all users.

Step 1) Evaluation Parameters

Setting up Parameters:

For evaluation success, there needs to be an up-front discussion PRIOR to setting up the evaluation

Set duration of Evaluation	Definition of Success of Evaluation leading to conversion
Provide Usage	Agree to communicate with OR Staff
Provide list of mandatory evaluators	How to address potential derailers
Agree to set up review meetings	How to address any clinical issues
Help support in-servicing	Keep competition out during evaluation

Note: Some hospitals will cover cost of evaluation product

Step 1 cont.) Pre-Eval Matrix

The whos, whats and hows:

- Stakeholders
 - Who are they?
 - What surgeons are mandatory to complete evaluation?
- Logistics
 - Who will be the main point of contact?
 - What are the credentialing needs?
 - How many ORs will be conducting evaluation?
 - How will in-services be handled?
 - How will this be communicated?
 - Determination of alternate distribution channel?
- Conversion
 - What is the definition of success for the evaluation (ex: no. of eval forms, >80% satisfaction, etc...)?
 - How will issues be resolved?
 - How will competition/ product be handled?

Step 2) Preparing for Evaluation

- Set up meeting with evaluation lead to:
 - Agree upon evaluation start and end date
 - Walk through evaluation parameters
 - Complete pre-evaluation information matrix
- Obtain/Verify usage by facility (Sizes, types, preferences)
Note: May need to assess how much evaluation product is really needed (be judicious)
- Confirm if account is receiving any ORC product via sterile packs (through whom)
- Confirm credentialing procedures for the sales rep
- Customer contract verification and communication (e.g. Healthtrust, Ascension)
- Ensure pricing/codes are in the system
- Provide announcement poster to eval lead
- Schedule meeting with OR Educator (to provide IFU and schedule training)
- Schedule OR Table Display and Hands-On In-services
- Obtain Purchase Order if possible for evaluation samples
- Competitive Inventory Count-Return of Excess product or relocation
- Order all product required for evaluation so that it is available 3-5 days prior to cases starting

Step 2 Cont.) Preparing for Evaluation

- Provide an OR Table Display with any announcement signage if applicable (Make sure to bring samples of SC-01(trocar swabs) and any other applicable products)
- Ask account to stop all orders of competitive product and review competitive representative handling during evaluation
- Complete List of Clinical Evaluators : Who are the main stakeholders?
- Confirm Case Schedule and coordinate coverage
- Conduct Hands-on In-service to OR staff : Sell clinical advantages before price

Step 3) Conducting the Evaluation

- Conduct In-Services
- Conduct surgeon Scrub-sink and circulating/scrub nurse product overviews at each target case
- Ensure all target cases have adequate rep coverage
- Solicit product feedback and ensure completion of evaluation form following each case
- Gather daily evaluation forms and provide daily feedback to coordinator
- Field any questions regarding eval product
- Conduct Weekly Review Meeting with coordinator
- Provide support for any clinical outliers and resources to address additional questions on product
- Provide any assistance and collateral for Cross Reference Sheet and Review Product Identifiers
- Prior to eval end, conduct check-in with eval lead and review parameters for success

Sample Evaluation Form



Clinical Evaluation Form

Sales Rep: _____ Hospital: _____

Date: _____ Specialty: _____

Circ. Nurse: _____

Procedure: _____

PRODUCT (circle)

Uterine ElevatOR Pro with OccludeOR Balloon™ Uterine ElevatOR Pro™ ColpotomizOR Tube™

Suture PassOR Pro™ Port ClosOR Pro™ InsufflatOR Needle/Tubing

Liquid Scope HelpOR™ Liquid Scope WarmOR™ Scope HelpOR™ Scope CleanOR™

Holstor PRO™ LapPakOR™ OTHER: _____

Performance: (circle one)

Clinical Performance: Very Good Good Acceptable Unacceptable

Ease of Use: Very Good Good Acceptable Unacceptable

Inclusion of Trocar Swabs Very Good Good Acceptable Unacceptable

Overall Performance Very Good Good Acceptable Unacceptable

Comments: _____

Purchase recommended: Yes _____ No _____

Reasons: _____

PRINT NAME: _____

SIGNATURE: _____

Step 4) Conversion

- Post evaluation review meeting with summary of results
- Reminder of parameters and definitions of success (Best if they are written down and agreed upon before evaluation starts)
- Communication on how to transition all codes in systems/labels etc...
- How will new product be communicated to staff?

Step 5) Post Conversion

- Set up final review meeting with Evaluation Lead
- Prepare summary and provide all completed evaluation sheets for review meeting
- Conduct post-Evaluation Meeting – Formalize Decision
- Agree on communication to Staff and roll-out of conversion
- Preference Cards – Changes
- Inventory Cleanup>Returns/Exchanges (Symmetry & Competitive)
- Post Conversion: 30, 60 & 90 Day Follow Up and Review Meetings

Best Practices for ORC evaluation

- Sell on clinical features and benefits to make the product more valuable to the account
- Fine tune the timing of the “value” message around price
- Don’t oversell- Just as good as... with some additional F&B
- Carry samples of the trocar swabs with you at all times
- Make sure you make the customer aware of the “sharpness” of the Suture PassOR product and sell on that as an advantage
- Utilize vertical selling to penetrate account with ORC products (make sure what goes with what, and what doesn’t)
- If afforded the opportunity to be present during the eval cases, explore opportunities to sell the entire bag