

ZIMMER BIOMET INDIA — CONFIDENTIAL

Comprehensive Revival Strategy & Competitive Intelligence

Field Feedback Analysis • Root Cause Solutions • ROSA vs Market Landscape
• 90-Day Execution Roadmap

Based on Zimmer Feedback Survey

ROSA / OptimiZe vs J&J / Stryker / S&N

ADGcatalyst Strategic Consulting

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Presentation Structure

Two integrated sections: Revival Strategy from field feedback + Competitive Intelligence on ortho robotics

PART A — REVIVAL STRATEGY

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Key Problem Statements
Manpower shortage, team silos, demo machine scarcity, process delays
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3-phase 90-day sprint with measurable milestones

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Field feedback on Core Team Core Competencies, Key Offerings

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India Battlefield & Winning Formula
Territory-level threat map + combined revival + ROSA deployment strategy

Key Problem Statement #1 — Manpower & Resource Crisis

PROBLEM 1 / 3

CSR Headcount Shortage

- J&J fields 9 CSRs; ZB fields only 2 CSRs in the same territory — a 4.5x disadvantage
- In another key region, J&J has 12 CSRs + Stryker 2 CSRs; ZB has only 1 CSR
- Respondents explicitly name headcount as the "biggest problem" in the organisation
- Insufficient CSRs lead to lost evaluations, missed deal closures, and disheartened teams

Demo Machine Scarcity

- Only 3 ROSA demo machines available nationally — 1 is fixed at Gurgaon HQ (non-deployable)
- Only 2 machines available for field evaluations across all of India
- Evaluation wait times exceed 4 months — competitors deliver demos in days
- Competitors provide region-wide demo availability; ZB cannot match this coverage

Field Voice: "2024 was a blank year — a lot of customers moved out of Zimmer. Recovery is yet to be done." The resource gap is the single largest reason deals are being conceded to Stryker Mako and J&J VELYS.

4.5x

J&J CSR advantage over ZB in key regions

4+ mo

Average evaluation wait time for ROSA demo

3

Total ROSA demo machines in India — only 2 deployable

3 days

Competitor clinical evaluation turnaround vs. ZB's 20 days

Key Problem Statement #2 — Team Silos & Collaboration Failure

PROBLEM 2 / 3

Recon vs. Robotics Team Disconnect

- Severe lack of collaboration and synchronisation between the ROSA (Robotics) and Recon (Implant) teams
- Recon team does not consider ROSA part of their business because ROSA revenue does not reflect in their targets
- Recon team members explicitly do not support ROSA evaluation requests in their accounts
- Communication gaps have directly cost deals — case study: Gorakhpur deal lost due to misalignment

Exclusion from Key Meetings & Decisions

- Recon team members kept completely in the dark; not called for meetings
- Excluded from final corporate hospital discussions and tender closures
- Last-minute pricing decisions by Robotics team without consulting Implant team
- This creates wrong impressions with hospital procurement teams

Credit Allocation & Incentive Misalignment

- ROSA case credit not attributed to Recon team — no motivation to push robot cases
- Resolving credit allocation between teams flagged as a "very critical point" by respondents
- Recon reps self-train to bypass ROSA team rather than collaborate
- No unified KPI, shared goal, or joint incentive structure exists

Deals Lost Directly Due to Silos

- Gorakhpur: Distributor mapping overlap caused a lost deal due to zero coordination
- Multiple corporate hospital RFPs lost due to last-minute, uncoordinated pricing
- Recon reps give incorrect information to surgeons because they are uninformed
- Competitor teams (J&J, Stryker) operate as ONE team — ZB fields two competing teams

Key Problem Statement #3 — Operational & Process Bottlenecks

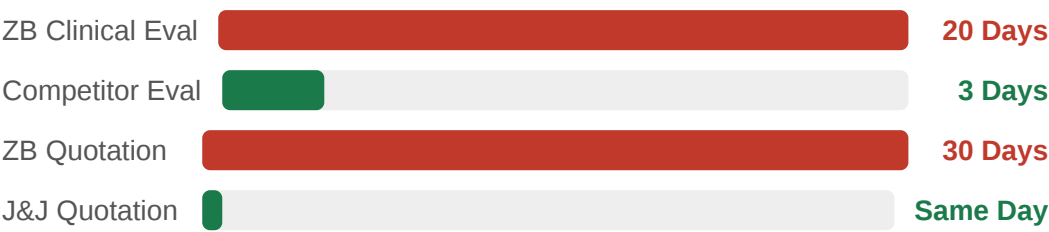
Quotation & Approval Delays

- Standard quotations take up to 1 month to convert to final approved quotations
- Price approvals are extremely slow; ROSA team does not revert promptly
- Field reps are forced to follow up repeatedly, damaging relationships
- Competitors provide same-day quotations; ZB takes weeks — deals lost in the gap

Service & Case Support Gaps

- Main concern for 2025: inadequate case support, supply failures, and absent paramedical support
- Poor service has directly led to lost implant deals and surgeon dissatisfaction
- No dedicated regional service budgets; ad-hoc escalation process
- Inventory issue: THR shifting to new implants but stock runs out within 15 days

Turnaround Time: ZB vs. Competition



Installation & Payment Model Gaps

- ROSA installation requires 2 weeks after purchase — creating hesitancy at final stage
- J&J places first, gets payment after 1 year; Depuy offers 2-year deferred payment
- ZB has no competitive placement or deferred payment model in India
- Mid-sized hospitals cannot justify upfront capital outlay without a rental/placement option

Solutions Devised from Problem Statements

Each solution is directly mapped to the root-cause problem identified by field respondents

Solution 1: Expand CSR & Manpower Immediately

- Hire minimum 6 additional CSRs across North, South, West, East territories
- Each major territory to have at least 1 dedicated ROSA CSR + 1 Recon liaison
- Benchmark: match J&J's CSR density within 180 days

Solves: CSR shortage, evaluation delays, lost deals due to coverage gaps

Solution 2: Increase Demo Machine Pool

- Procure 3-4 additional ROSA demo units; deploy regionally (not fixed at HQ)
- Establish dedicated demo pods in 4 key metro cities
- Reduce evaluation lead time from 4 months to under 3 weeks

Solves: 4-month wait, competitor demo advantage, evaluation conversion rate

Solution 3: Form Unified Marketing Team (UMT)

- Create a single team where ROSA and Recon work under shared leadership
- Joint KPI structure: ROSA case + implant revenue counted for both teams
- Appoint Robotics Champion per region reporting to ASM Recon

Solves: team silos, credit misalignment, last-minute pricing failures

Solution 4: Streamline Quotation & Approval Process

- Implement a 48-hour SLA for all ROSA quotation approvals
- Empower regional ASMs with pre-approved pricing bands
- Eliminate multi-layer approvals for standard configurations

Solves: 1-month quotation delay, lost deals to faster competitors

Solution 5: Launch Rental & Placement Models

- Introduce ROSA placement model: hospital pays per case, not upfront capital
- Offer 1-year deferred payment option for corporate hospitals
- Pilot rental model beyond Surat to capture mid-sized hospitals

Solves: capital barrier, payment model gap vs. J&J and Depuy

Solution 6: Academic Engagement & KOL Programme

- Increase surgical training workshops, CMEs, and fellowship programmes
- Build a network of ROSA Clinical Champions in top hospitals
- Leverage GCC partnerships (Apollo, Fortis, Max, Manipal) for endorsement

Solves: trust deficit, slow surgeon adoption, weak KOL network

Prioritised Solutions — 3-Tier Action Framework

Solutions ranked by urgency, business impact, and feasibility of execution within the India context

PRIORITY 1 — CRITICAL

Fix the Foundation

- Hire CSRs immediately to close the 4.5x headcount gap vs. J&J
- Procure 3+ additional ROSA demo units for regional deployment
- Reduce clinical evaluation turnaround from 20 days to 5 days
- Implement 48-hour quotation approval SLA
- Resolve credit attribution: ROSA case credit must flow to Recon team

Timeframe: Days 1-30

PRIORITY 2 — HIGH IMPACT

Restructure & Align

- Form the Unified Marketing Team (UMT) — Recon + ROSA under single leadership
- Appoint ROSA Clinical Champions in all major territories
- Launch placement model — remove capital barrier for mid-sized hospitals
- Begin territory demarcation and distributor mapping exercise
- Launch ROSA 5-year comprehensive warranty as market differentiator

Timeframe: Days 15-60

PRIORITY 3 — STRATEGIC

Grow & Defend

- Deploy academic engagement programme: CMEs, fellowships, KOL dinners
- Seed ROSA in Apollo, Fortis, Max, Manipal chains via GCC partnerships
- Build ZBEdge Analytics dashboard for outcome data — drive evidence
- Introduce Tier-2 city surgeon onboarding programme
- Launch mymobility patient recovery app co-promotion with surgeons

Timeframe: Days 30-90

Key Action Points — Ownership & Accountability

Specific, assigned, measurable actions to be initiated immediately

A1 CSR Recruitment & Deployment

JDs issued, interviews initiated, onboarding completed within 30 days for minimum 6 CSRs across key territories

Owner: National Sales Head

A2 ROSA Demo Unit Procurement

Business case submitted to Global Supply; 3 additional units earmarked for India within Q1 2027; regional demo hubs established in Mumbai, Delhi, Bangalore, Hyderabad

Owner: ROSA Business Head

A3 Unified Marketing Team (UMT) Formation

UMT charter drafted, roles defined, Robotics Champion appointed per region, first joint meeting within 2 weeks; shared P&L view established

Owner: Country Head + NSH

A4 Quotation SLA Implementation

48-hour approval SLA enforced via CRM workflow; pre-approved pricing bands issued to all ASMs; compliance tracked weekly

Owner: Commercial Excellence

A5 Territory Demarcation & Mapping

All territories re-mapped; distributor overlaps resolved; clear ownership assigned to each account; Gorakhpur-type conflicts eliminated

Owner: ASMs + Regional Heads

A6 Clinical Turnaround Reduction

Evaluation process reengineered to 5-day turnaround; dedicated evaluation scheduling team created; progress reviewed fortnightly against 5-day target

Owner: Service & Clinical Affairs

A7 Placement & Rental Model Launch

Finance team to build India-specific per-case and deferred-payment models; pilot in 3 hospitals by Day 45; full roll-out by Day 90

Owner: Finance + Marketing

A8 5-Year Warranty Programme Activation

ROSA 5-year comprehensive warranty positioned as lead commercial offer; sales tools, one-pagers, and objection-handling scripts updated; all reps trained

Owner: Marketing + Training

Implementation Timeline — 90-Day Revival Sprint

Three sequential phases, each building on the previous, with measurable milestone gates

PHASE 1

Days 1 – 30

STABILISE & STAFF UP

- Launch CSR recruitment drive; target 6 hires
- Submit demo unit procurement business case
- Draft UMT charter; appoint Regional Champions
- Issue 48-hr quotation SLA across all regions
- Resolve territory demarcation and distributor conflicts
- Activate ROSA 5-year warranty sales toolkit

Phase 1 KPIs

- 6 CSR offers accepted
- Demo procurement case approved
- Quotation SLA compliance >80%

PHASE 2

Days 31 – 60

ALIGN & ACCELERATE

- UMT first joint review meeting; shared KPI live
- Pilot placement model in 3 hospitals
- Clinical evaluation turnaround reduced to 7 days
- Regional demo hubs established in 2 metros
- First ROSA Clinical Champion cohort trained
- ZBEdge Analytics dashboard onboarding starts

Phase 2 KPIs

- Placement model pilots active in 3 hospitals
- Evaluation TAT <7 days in pilot regions
- 8+ ROSA cases/month in pilot territories

PHASE 3

Days 61 – 90

SCALE & DEFEND

- Full placement model roll-out nationally
- Apollo / Fortis / Max — GCC partnership proposals submitted
- CME / KOL programme launched in 10+ cities
- Tier-2 city surgeon onboarding programme active
- mymobility co-promotion campaign live
- Monthly ROSA case volume review with Country Head

Phase 3 KPIs

- 30% uplift in ROSA case volume vs. baseline
- 2+ GCC MoUs signed by Day 90
- NPS score from field team improved >+20pts

Key Strategies Suggested by Respondents

Direct field voice — strategies proposed by ZB India sales team and distributor partners in the feedback survey

Respondents did not just identify problems — they proposed **specific strategic interventions**. These are not consultant-led hypotheses; they are ground-level solutions from those who interact with surgeons, hospitals, and competitors daily.

Strategy: Organisational

"One Team, One Goal"

Respondents call for a unified front where Recon and Robotics teams speak in unison to hospitals and surgeons — mirroring the successful model of J&J/Depuy, where one salesperson represents the full portfolio. This eliminates conflicting messages and pricing confusion at the account level.

Strategy: Commercial

Bundle Pricing & Price Bracketing

Establish clear price brackets to avoid losing face value in negotiations. Offer comprehensive bundle pricing (robot + implants + accessories + mymobility) to counter competitors who offer low-price bundling. Bundles must be pre-approved so field teams can respond in real time.

Strategy: Market Development

Seeding Sites — Stryker Playbook

Implement seeding strategies modelled on Stryker's approach: place ROSA in a key institutional hospital at near-zero margin to establish market presence, generate peer influence, and create reference sites for surgeon-to-surgeon advocacy. One strong seeding site can unlock an entire region.

Strategy: Capability

Target High-Volume Surgeons

Prioritise surgeons performing 300+ joints per year. These individuals create disproportionate case volume, serve as KOLs, and influence peers. A single high-volume surgeon converted to ROSA can deliver more value than 10 average accounts.

Strategy: Field Enablement

Recon Self-Sufficiency in ROSA Sales

Train Recon representatives to handle basic ROSA conversations independently, without waiting for dedicated CSR availability. This bypasses the current coverage gap and ensures ROSA is represented in every surgeon conversation, regardless of CSR availability.

PART B — COMPETITIVE INTELLIGENCE

Ortho Robotics: The Battlefield

How ROSA OptimiZe compares to J&J VELYS, Stryker Mako, and S&N CORI — and how ZB India can win every competitive conversation

STRYKER

Mako

Highest Threat

- 2.5M+ procedures; 47 countries
- 800+ clinical studies
- CT-based, 36-landmark planning
- Dominant India hospital presence

J&J MEDTECH

VELYS

Major Threat

- 9 dedicated CSRs in India
- Bed-mounted; compact footprint
- ACCUBALANCE + PROADJUST
- Attune/DePuy implant ecosystem

SMITH & NEPHEW

CORI

Emerging Threat

- Handheld; no large robot arm
- Image-agnostic; broadest scope
- TKA + UKA + Revision + THA
- Limited India presence today

ZIMMER BIOMET

ROSA + OptimiZe

Our Platform

- 90 landmarks — most precise
- Only automated KA in industry
- FDA cleared Nov 2025; 46% faster
- Persona IQ + mymobility + 5-yr warranty

Feature-by-Feature Comparison: ROSA vs. Competition

Based on publicly available information from official manufacturer websites, October 2026

Feature	ROSA + OptimiZe	VELYS (J&J)	Mako (Stryker)	CORI (S&N)
Bone Registration	90 Landmarks	ADAPTIVE Tracking	36 Landmarks (CT)	Image-agnostic
CT Scan Required	No (Image-free)	No	Yes (Mandatory)	No
Kinematic Alignment	Automated (Only in Industry)	Manual	Manual	Manual
Bone Pin Required	No (Active Track)	No	Yes	No
Planning Speed	46% Faster (OptimiZe)	Standard	CT adds time	Fast (no imaging)
Smart Implant	Persona IQ	None	None	None
Patient Recovery App	mymobility	None	None	None
Warranty Programme	5-Year Comprehensive	Standard	Standard	Standard
India Market Presence	Established	Growing (9 CSRs)	Dominant	Early-stage

ROSA OptimiZe: 5 Unmatched Differentiators

FDA cleared November 2025 — no competitor platform matches this combination of capabilities

01

90-Landmark Bone Registration

The most precise bone registration in the industry — 2.5x more data points than Mako's CT-based 36-landmark approach. Greater precision = better implant positioning = better patient outcomes.

vs. Mako: 36 landmarks + mandatory CT scan

02

Only Automated Kinematic Alignment

ROSA OptimiZe is the ONLY robotic system in the world with automated Kinematic Alignment. Competitors rely on manual KA adjustments — ROSA does it automatically, reducing surgeon variability.

vs. VELYS, Mako, CORI: all manual KA

03

46% Faster Surgical Planning

Active Track technology eliminates bone pins entirely, and OptimiZe's workflow delivers 46% faster intra-operative planning vs. prior ROSA. Less time in OR = lower cost per case for hospitals.

vs. Mako: bone pins required, longer setup

04

Persona IQ Smart Knee + mymobility

Only ROSA integrates with Persona IQ — the industry's first smart knee implant with embedded sensor — and mymobility, the Apple Watch-enabled patient recovery app. Zero competitors offer this ecosystem.

vs. VELYS, Mako, CORI: no smart implant, no recovery app

05

5-Year Comprehensive Warranty

ZB India's 5-year comprehensive warranty includes ROSA OptimiZe access, mymobility patient app, annual clinical review, and full service coverage. No competitor in India offers a matching programme.

vs. All competitors: standard warranty only

India Battlefield: Territory Strategy & Objection Handling

Territory-level competitive threat map + ready-to-use ROSA vs. Mako / VELYS objection responses

Territory-Level Competitive Priority

NORTH	Highest Mako Presence; VELYS Expanding Corporate hospitals (Fortis, Max) are primary Mako strongholds. VELYS aggressively targeting with 9 CSRs. UMT deployment + GCC partnership critical here.
SOUTH	Strong Corporate Chain Presence Apollo, Manipal chains are high-priority battlegrounds. ROSA utilisation audit urgent; CMO engagement in Apollo/Max/Fortis must begin in Phase 1.
WEST	High-Volume Surgeons; Mixed Competitive Landscape Focus on 300+ joints/year surgeons. Placement model pilot should begin here. Surat rental model to be expanded.
EAST	New Distributor; Market Recovery Phase New distributor on board. Assign ROSA Clinical Champion immediately. Tier-2 surgeon onboarding programme priority here.

Objection Handling: ROSA vs. Competitors

"Mako has more cases and data globally."

ROSA has 90 landmarks vs. Mako's 36; no CT scan required; no bone pins; and automated KA — Mako cannot match these. More cases does not mean better technology.

"J&J VELYS has more CSRs in my region."

VELYS offers no smart implant, no patient app, no 5-year warranty. ROSA + Persona IQ + mymobility is the only complete digital care ecosystem in the market today.

"CORI is cheaper and doesn't need a robot arm."

CORI has no smart implant integration, no outcomes analytics, no recovery app, and no long-term India registry data. It is a navigation tool, not a full robotic solution.

The Winning Formula: Revival + ROSA + Competitive Advantage

Integrating all elements into a single unified commercial strategy for ZB India

P1

People First

Solve the CSR gap, form UMT, appoint Champions — no strategy succeeds without the right people in the right places. This is the non-negotiable foundation.

P2

Process Overhaul

48-hour quotation SLA, 5-day evaluation turnaround, streamlined approval chains. Speed kills competitors — every delay today is a deal lost tomorrow.

P3

Platform Differentiation

90 landmarks, automated KA, Active Track, Persona IQ, mymobility, 5-year warranty. No competitor offers this combination. Own the narrative in every surgeon meeting.

P4

Penetration Strategy

GCC partnerships, KOL seeding, Tier-2 expansion, placement model for mid-markets. Compete everywhere Mako and VELYS are present — and win on value, not price.

The Revenue Equation

Right People & Structure

+

Faster Processes

ROSA OptimiZe Platform

+

GCC Penetration

30%+ ROSA Case Volume Growth in 90 Days

Combined Impact Target

- ROSA cases: +30% in 90 days
- Implant pull-through: +20% with UMT
- Corporate hospital MoUs: 2+ by Day 90
- Evaluation TAT: 4 months to 5 days



Stryker Mako
CT-based | 36 Landmarks | Haptic Arm

HIGHEST THREAT

ZB COUNTER-STRATEGY

- **90 Landmarks vs. 36:** Lead every demo with the landmark superiority argument — "more data points = better outcomes"
- **CT radiation cost:** Quantify per-patient CT cost & time (INR + days) vs. ROSA's intraoperative-only workflow
- **Registry proof:** Counter Mako's 19% survivorship claim with ROSA's European RCT data & Persona IQ sensor outcomes
- **Faster surgery:** 46% planning time reduction (Optimize) vs. Mako's CT planning burden — shorter OR time = revenue for hospital



J&J VELYS
Bed-mounted | TKA + UKA | ACCUBALANCE

MAJOR THREAT

ZB COUNTER-STRATEGY

- **Footprint advantage:** ROSA's dedicated floor-based arm = no bed-compatibility risk; stress-free OR integration
- **Full portfolio:** VELYS is TKA + UKA only; ROSA covers TKA, UKA, spine & hip — one platform ROI for hospital CFO
- **mymobility + Persona IQ:** End-to-end patient journey from pre-op app to implant sensor data — VELYS has no equivalent
- **5-Year Warranty:** Only ROSA offers 5-yr comprehensive warranty — reduce CAPEX risk objection for private hospitals



S&N CORI
Handheld | Image-agnostic | TKA+UKA+Revision

EMERGING THREAT

ZB COUNTER-STRATEGY

- **Full robot vs. hand-held:** CORI = assisted cutting, not true robotics — ROSA's haptic arm provides quantified precision
- **Clinical evidence depth:** ROSA backed by 800+ peer-reviewed studies (shared with Mako family); CORI clinical data limited in India
- **Cost positioning:** In tier-2/3 cities where CORI targets price-sensitive segments, deploy ROSA rental/seeding model to match CAPEX
- **Recon pull-through:** ROSA inherently drives Persona Knee implant volume — CORI does not lock in S&N implants as strongly

90-Day Combined KPI Tracker — Revival + ROSA Metrics

SYNTHESIS

ROSA ROBOTICS KPIS

ROSA CASES — DAY 90 30+ Evaluated cases in pipeline	EVALUATION CLOSURES 6+ Signed evaluation agreements	KOL SURGEONS ENROLLED 10 ROSA OptimiZe programme	DEMO-TO-EVAL RATE 40% Demo sites converting to eval	PLANNING TAT (OPTIMIZE) 46% less vs. pre-OptimiZe baseline
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IMPLANT + REVENUE KPIS

IMPLANT REVENUE Q1 +15% vs. same quarter prior year	PULL-THROUGH RATIO 1:8 1 ROSA case = 8 implant sets	QUOTATION TAT < 2 days End-to-end (was 30 days)	CORPORATE HOSPITAL CLOSSES 3+ Apollo/Fortis/Max/Manipal	DEMO MACHINE DEPLOYMENT 4 units North + South + West + East
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PHASE MILESTONES

Phase 1 — Days 1-30 - CSR hiring complete (4 new); UMT structure signed off - Demo units dispatched to all 4 regions - Quotation SLA portal live; first KOL programme enrolled	Phase 2 — Days 31-60 6+ ROSA evaluations initiated; rental model launched in 2 cities 3 corporate hospital agreements in final negotiation - Implant revenue tracking vs. target monthly; unified incentive active	Phase 3 — Days 61-90 - First ROSA purchase order received from GCC hospital 30 ROSA cases documented; Persona IQ case series published - All-India review: KPI dashboard shared with Country Head + MD
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Next Steps, Accountabilities & Decision Requests

Decisions required from Country Head and MD within 7 days

COUNTRY HEAD — DECISIONS NEEDED

People, Structure & Budget

- 1 Approve CSR headcount (4 new hires) and regional allocation plan by Day 7
- 2 Sanction Unified Marketing Team (UMT) structure with 7 defined roles including GCC Partnership Liaison
- 3 Authorise ROSA rental / seeding pricing model for tier-2 cities and private hospital chains
- 4 Mandate cross-functional KPI tracker — shared between Recon and Robotics BUs with monthly review cadence

MD — STRATEGIC ENDORSEMENTS

Platform, Warranty & GCC Mandate

- 1 Formally launch 5-Year Comprehensive Warranty as ZB India's primary ROSA market differentiator — press release + sales kit
- 2 Ratify GCC corporate hospital mandate: Apollo, Fortis, Max, Manipal as Priority 1 targets with C-suite engagement plan
- 3 Approve mymobility + Persona IQ bundled commercial offer to position ROSA as end-to-end patient journey platform
- 4 Commission 90-day all-India competitive intelligence refresh — counter Mako 4 launch and VELYS expansion

ROSA BUSINESS HEAD — IMMEDIATE ACTIONS

Pipeline, KOL & Demo Deployment

- 1 Deploy 4 regional demo units (North, South, West, East) by Day 14 — confirm logistics with Operations by Day 3
- 2 Enrol first cohort of 10 KOL surgeons into ROSA OptimiZe programme — case series target: 3 published by Month 6
- 3 Build 30-case ROSA evaluation pipeline by Day 60 — weekly deal-stage review with NSH and field CSRs
- 4 Conduct Mako 90-landmark vs. 36-landmark surgical demo at 2 key accounts per region — Q1 completion target

Combined Revenue Target — 90 Days | **ROSA Cases: 30+ in evaluation** | **Implant Revenue: +15% YoY** | **GCC Hospital Closes: 3 agreements** | **Review Date: Day 30 & Day 60**
 Implant + ROSA combined pipeline | Pipeline conversion target by Day 90 | Driven by pull-through from ROSA accounts | Apollo / Fortis / Max / Manipal | All-India KPI review with MD + Country Head