

FIELD INTELLIGENCE — BASED REVIVAL STRATEGY

Zimmer Biomet India ROSA & Recon Revival Strategy

Derived from Primary Field Feedback | ADGcatalyst Strategic Consulting

SOURCE

Primary Field Feedback

AUDIENCE

Country Head / MD

CLASSIFICATION

Confidential

PREPARED BY

ADGcatalyst

The Crisis at a Glance — What the Field is Telling Us

Primary feedback distilled into measurable signals of revenue at risk

15+

Deals Lost

Across regions due to service failure, headcount gaps & team misalignment

2 vs 9

ZB CSR vs J&J CSR

Zimmer has 2 CSRs; J&J fields 9 in the same territory

20 Days

ZB Turnaround

vs. 3-day competitor turnaround — a 6x process disadvantage

4+ Months

ROSA Evaluation Time

Only 2 demo machines available for evaluation across all regions

2024 Declared a Blank Year

Significant customer attrition in 2024. Recovery is ongoing. Trust deficit requires structured re-engagement, not just product promotion.

ROSA & Recon Operate in Silos

ROSA team not sharing deal updates with Recon. Recon reps not invited to corporate meetings. 4–5 deals lost per region due to this fragmentation.

Competitor Momentum Growing

J&J speaks in unison; Stryker seeds sites aggressively. Zimmer lacks unified messaging, regional budgets, and field presence to compete effectively.

Headcount Crisis & CSR Deficit

Identified by field as the single biggest barrier to deal conversion

Zimmer is Critically Outnumbered in the Field

J&J deploys 9 CSRs versus Zimmer's 2 in the same territory. Stryker fields dedicated sales + CSR pairs per account. Zimmer has a single rep managing everything — sales, service, and clinical support simultaneously.

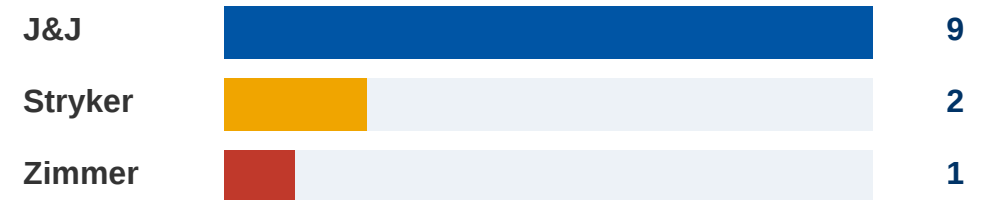
Direct Revenue Consequence

Insufficient headcount means evaluations get delayed, after-sales service is absent, and surgeons feel abandoned. Multiple respondents directly attributed 2–4 lost deals per person to this factor alone. Team morale is disheartening.

Paramedical & Case Support Absent

Case support and paramedical assistance are reported as lacking across regions. Without this, even willing surgeons cannot adopt ROSA or upgrade implant protocols.

CSR Count Comparison (Sample Territory)



FIELD VOICE

"Headcount is the Biggest problem. 9 CSR — J&J. 2 CSR — Zimmer. 2 to 4 deals lost, team is disheartened."

FIELD VOICE

"Max is facing a lot of heat due to a breakdown — more than a year. Lost interest due to support lacking."

ROSA–Recon Team Fragmentation

Silo operations between Robotics and Implant teams are directly costing deals

Revenue Attribution is the Root Cause

ROSA cases are not counted in Recon team revenue targets. As a result, Recon reps have no financial incentive to support ROSA placements — leading to active indifference and passive obstruction.

Communication Blackout Between Teams

Recon reps are not invited to ROSA corporate meetings. Post-evaluation outcomes are not shared. Last-minute pricing by ROSA team creates confusion and wrong impressions with institutional clients.

Competitor Contrast: J&J Speaks in Unison

DePuy J&J deploys a single unified voice — surgical robot + implant + service presented as one integrated offer. Zimmer fields two separate teams with conflicting narratives and no shared goal.

Documented Deal Losses from Silo Behaviour

- 4–5 deals lost in one region alone where ROSA and Recon operated separately
- Gorakhpur deal lost due to lack of synchronisation — communication gap the cited reason
- 3–4 deals lost because Recon rep was not called for the meeting at all
- Fortis Escort: Surgeon asked for update; Recon rep completely in the dark
- Max IP: No post-evaluation meeting happened at corporate level

FIELD VOICE

"Recon team does not consider ROSA as their business as ROSA is not part of their revenue. He requested the Recon team of North — he did not receive support."

Demo Machine Scarcity & Evaluation Delays

Surgeons wait 4+ months for ROSA evaluation — by then, competitors have already closed

Only 2 Demo Machines Available Nationwide

Zimmer has 3 ROSA demo units in total — one is permanently fixed at the Gurgaon office, leaving just 2 available for all field evaluations across the entire country. This creates a queue that stretches beyond 4 months in peak demand periods.

No Region-Wide Demo Availability

Competitors maintain region-specific demo units that can be deployed quickly. Zimmer has no regional demo inventory. Evaluation booking requires central coordination, creating bottlenecks and extended lead times.

Installation Delays Add to Evaluation Gap

Each evaluation requires a 2-week installation window before a surgeon can assess the system. Combined with the demo machine queue, deals are effectively halted for months — during which time competitor systems are already being trialled.

4+

Months average wait for
ROSA evaluation

Demo Resource Comparison

Zimmer

2

Demo units available
nationally

Competitors

Regional

Dedicated units per
region

FIELD VOICE

*"Evaluation could not be done, deal got halted.
Region-wide demo is not available unlike
competitors."*

Service Failure & Process Bottlenecks

After-sales service collapse and 6x slower processes are the primary reasons deals are lost

Service Failure is the No. 1 Deal Killer

Multiple respondents explicitly stated that deals were lost because of poor service. Max Healthcare has faced service issues for over a year — no resolution. Breakdowns without timely repair permanently damage relationships with high-value accounts.

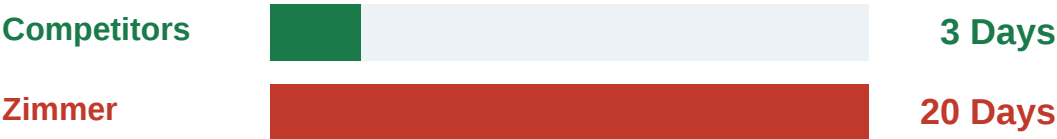
Budget Not Allocated Regionally

There is no dedicated budget allocated at regional level for ROSA activities, seedings, or evaluations. Field teams cannot respond to opportunities without central approval — which adds further weeks to an already slow process.

Inventory Management Failure

THR implant inventory runs out within 15 days of stocking new products. Recon teams cannot support customers requiring replacement implants mid-cycle. This creates surgical schedule disruptions that damage ZB's reliability reputation.

Process Turnaround Comparison



FIELD VOICE

"Lack of service is the major reason for getting deals lost. The deal got lost because of poor service."

FIELD VOICE

"Competitors have a 3-day turnaround. Zimmer — 20 days. Dedicated budget needs to be allocated in the regions."

Quotation & Price Approval Delays

Slow internal approvals and poor ROSA team responsiveness are losing deals at the closing stage

Standard to Final Quotation Takes Weeks

Converting a standard quotation to a final customer quotation involves multiple rounds of internal approval. The process takes weeks — often a full month — by which time competitor pricing has already been submitted and accepted.

ROSA Team Non-Responsive on Pricing

Price approval for ROSA placements takes very long. The ROSA team does not revert proactively — field reps have to chase for basic pricing information. This creates a negative impression with surgeons and hospital purchase committees.

Last-Minute Price Closure Creates Confusion

Instances where ROSA team closed price at the last minute without coordinating with Recon — giving the wrong impression to the hospital and undermining the Recon relationship built over months.

Current Quotation Process (Problematic)

- 1 — Standard quotation raised **Day 1**
- 2 — Internal review & pricing query **+5 days**
- 3 — ROSA team chased for response **+7 days**
- 4 — Price escalation for approval **+7 days**
- 5 — Final quotation issued to customer **~Day 25–30**

FIELD VOICE

"Time of approval is very long for price. ROSA team don't revert. He had to ask repeatedly for the information. Quotation takes up to one month."

Solutions Framework — Problem-to-Solution Mapping

Each solution is directly derived from a documented field problem statement

Five core problems mapped to five evidence-based solutions — each traceable to specific field feedback:

#	Problem	Solution Devised	Primary Owner	Impact
1	Headcount & CSR Deficit	Immediate field-force expansion: add 1 dedicated CSR per key territory + 2 paramedical case-support specialists nationally	Country Head + HR	Critical
2	ROSA-Recon Team Silos	Merge revenue targets: ROSA cases counted in Recon P&L. Appoint a ROSA Champion per territory reporting to Recon ASM. Mandatory joint meetings on all active accounts	Country Head + Sales Director	Critical
3	Demo Machine Scarcity	Deploy 2 additional demo units regionally (ROM and South first). Remove permanent Gurgaon fixture — all 3+2 units to be field-deployable on a 5-day turnaround SLA	ROSA Clinical Marketing Mgr	High
4	Service Failure & 20-Day Process	Establish regional service SLA: all breakdowns attended within 48 hours. Allocate dedicated regional ROSA service budget. Reduce process turnaround to 5 days through pre-approved evaluation kits	Service Head + Regional Mgrs	High
5	Quotation & Approval Delays	Introduce price bracket authority: field managers pre-authorised within a defined discount band. Standard-to-final quotation SLA: 5 working days maximum. ROSA + Recon joint quotation template mandatory	Commercial Head + Finance	High

Prioritised Solutions — Ranked by Revenue Impact

Sequenced by urgency, revenue risk, and implementation feasibility

Rank	Solution	Revenue Risk if Delayed	Feasibility	Priority
1				Critical
2	Field-Force Expansion — Add CSRs & Case Support Per Territory	Very High — 15+ deals already lost; competitor CSR advantage is compounding daily	30 days — HR activation needed	Critical
3	Streamline Quotation to 5-Day SLA — Pre-Authorised Price Brackets	High — deals are lost at final closure stage due to speed disadvantage	30 days — Commercial Head sign-off	Critical
4	Regional Demo Unit Deployment — 5-Day Demo Turnaround SLA	High — 4-month evaluation delays are killing pipeline velocity	60 days — procurement + logistics	High
5	Service SLA: 48-Hour Breakdown Response + Regional Budget Allocation	High — trust with existing accounts being eroded daily; Max breakdown is over 1 year old	60 days — budget + service ops	High
6	Academic Engagement Programme — KOL Activation & Trust Re-Building	Medium — brand rehabilitation takes time but must begin immediately	90 days — KOL identification & outreach	Medium

Key Action Points — What Must Happen Now

10 concrete actions, each directly traceable to field feedback

1 Merge ROSA + Recon Revenue Targets

Country Head to issue directive: ROSA cases count in Recon territory revenue. Single P&L from next quarter.

Immediate

2 Appoint ROSA Champion per Territory

One field person per region designated as ROSA Champion, reporting to Recon ASM — bridges the two teams on all active accounts.

Immediate

3 Mandatory Joint Account Reviews

Biweekly joint meeting: ROSA + Recon on every account with active evaluation, pending quote, or post-evaluation follow-up. No solo closures permitted.

Immediate

4 Resolve Max Healthcare Breakdown

Escalate immediately — breakdown has been pending over 1 year. Assign dedicated service engineer within 48 hours.

Immediate

6 Hire & Deploy Additional CSRs

Minimum 1 additional CSR per key territory (ROM, South, North). Paramedical case support: 2 national specialists for ROSA OT support.

Day 30

7 Territory Demarcation & Distributor Mapping

Clear territory boundaries drawn for all regions. All distributors mapped in East, UP, Gujarat. New East distributor fully onboarded with training.

Day 30

8 Deploy Regional Demo Units

2 new demo units procured and assigned regionally (ROM and South). All existing units freed from Gurgaon fixture. Demo-to-evaluation SLA: 5 working days.

Day 60

9 Regional Service Budget Allocation

Dedicated quarterly budget per region for ROSA service, evaluations, and seeding activities — no central approval required within band.

Day 60

Implementation Timeline — 90-Day Revival Plan

Phased execution across Immediate, 30-Day, 60-Day, and 90-Day horizons

Immediate Within 1 Week	Phase 1 — Day 30 Structural Fixes	Phase 2 — Day 60 Resource Deployment	Phase 3 — Day 90 Market Re-Engagement
Merge ROSA + Recon P&L Country Head directive — effective next reporting cycle	CSR Hiring Activated Offers to 1 CSR per key territory + 2 paramedical	Regional Demo Units Deployed ROM + South: dedicated demo units, 5-day turnaround	KOL Engagement Programme 5 priority KOLs per region activated; CMEs initiated
ROSA Champion Appointed One per territory, reporting to Recon ASM	Price Bracket Authority 5-day quotation SLA; pre-approved discount bands	Regional Budgets Allocated Quarterly ROSA activity budget per region — no central approval within band	Bundle Offer Launched ROSA + implant + accessories + mymobility full offer live in field
Max Breakdown Resolved Dedicated engineer assigned within 48 hrs	Territory Demarcation All regions mapped; East distributor onboarded	Inventory Cycle Fixed THR stocking rhythm corrected; 30-day buffer maintained	Seeding Sites Identified Top 10 high-volume hospitals targeted for seeding placements
Joint Account Reviews Begin Biweekly ROSA + Recon reviews for all live accounts	Service SLA Issued 48-hr breakdown response; SLA published internally	New CSRs On-Ground All hired CSRs inducted, trained, and territory-assigned	Academic Trust Rebuilt First round of evidence sessions and publication support in motion

Strategies Suggested by Respondents — Voice of the Field

Verbatim strategic thinking from sales teams, ASMs, and clinical representatives on the ground

Strategy 1

"One Team, One Goal" — Mirror DePuy J&J

Respondents explicitly cited DePuy J&J's unified team model as the benchmark. Recon and ROSA must present and execute as a single integrated force — one narrative, one price, one account plan.

Cited by multiple respondents across North, South & ROM regions

Strategy 2

Target High-Volume Surgeons (300+ Joints/Year)

Field recommends focusing all ROSA and implant efforts on surgeons performing 300+ joint replacements annually. These accounts have the volume and infrastructure to maximise ROSA case throughput and justify the platform investment.

Cited specifically in territory feedback — North & South

Strategy 3

Seeding Sites Strategy — Replicate Stryker's Playbook

Stryker's seeding approach — placing limited disposables and instruments at key hospitals to establish a foothold before a full sale — was highlighted as an effective competitive tactic that Zimmer should replicate immediately.

Strategy 4

Self-Sufficient Recon Team — Train Recon to Close ROSA

Given the inadequacy of dedicated ROSA support, field suggests training senior Recon reps to handle routine ROSA sales conversations independently. This creates backup capability and reduces dependency on the chronically understaffed ROSA team.

Cited by Recon reps who lost deals waiting for ROSA team

Strategy 5

Rental & Deferred Payment Models — Beyond Surat

Respondents suggest expanding rental and placement models to mid-sized hospitals nationally. Also recommend adopting J&J's deferred payment model (payment after 1 year) and DePuy's 2-year deferred model to compete on commercial terms.

Cited in pricing strategy discussion — multiple regions

Strategy 6

Clear Price Bracket & Bundle Pricing — No Face Value Loss

Field recommends a defined, published price bracket so reps can hold value confidently. Comprehensive bundle pricing (ROSA + implant + accessories) presented as a single offer counters competitors offering

Competitive Benchmarking — ZB vs J&J vs Stryker

Field-reported competitive intelligence across key commercial and clinical dimensions

Dimension	Zimmer Biomet	J&J / DePuy	Stryker / Mako
CSR per Territory	1–2 CSR	9–12 CSR	2–4 CSR + Sales pair
Demo Machine Availability	2 nationally; 4+ month wait	Regional units; rapid deploy	Regional; 3-day turnaround
Evaluation Turnaround	20 days	3 days	3 days
Team Alignment (Recon + Robotic)	Separate P&L; no collaboration	Unified — "speaks in unison"	Integrated sales model
Market Placement Model	Limited placement; Surat only	Placement + 1-year deferred payment	Seeding + aggressive placements
Quote-to-Close Speed	25–30 days	7–10 days	7–10 days
Academic & KOL Engagement	Limited; trust deficit post-2024	Strong — structured KOL programme	Active seeding + evidence generation

REVIVAL ROADMAP SUMMARY

The Path Forward — 5 Problems, 6 Actions, 90 Days

- **Week 1:** Merge P&L targets, appoint ROSA Champions, resolve Max breakdown, begin joint reviews
- **Day 30:** New CSRs hired, price bracket authority active, territory maps finalised, service SLA published
- **Day 60:** Regional demo units deployed, budgets allocated, inventory cycle corrected
- **Day 90:** KOL programme active, bundle offer live, seeding sites identified, academic trust rebuilding

The Non-Negotiable First Step

Merging ROSA and Recon revenue targets is the single action that unlocks every other fix. Without structural alignment, no service investment, no CSR hire, and no demo unit will deliver sustained results.

Credit Must Follow Effort

Field explicitly flagged the credit attribution question as "very critical." The team that supports the deal must share the incentive. Without this, the "One Team" culture is a slogan — not a reality.

Decision Required — Country Head

Three decisions this week: (1) Merge P&L, (2) Appoint ROSA Champions, (3) Escalate Max breakdown. These cost nothing and stop the bleeding immediately.