

ZIMMER BIOMET INDIA

Unified Revenue Growth Strategy

Country Head Strategic Briefing

Implant + ROSA Synergy | 5-Year Warranty Programme | Bundled Offer Architecture
Unified Marketing Team with GCC Partnership | Common Goals & Incentive Structure

Prepared for: Country Head, Zimmer Biomet India | September 2026 | ADGcatalyst Strategic Consulting | Confidential

Section 1: Five Priority Issues

Evidence from 66 field entries across 8 territories and Month 1 engagement report | Ordered by revenue impact

PRIORITY ISSUE 1

Implant and ROSA Teams Operating as Competitors

33 / 66 entries (50%)

Two teams call on the same hospital with separate targets and no shared proposition. No one owns total account revenue. Fixable with a Country Head directive — no budget required.

PRIORITY ISSUE 2

ROSA Narrative Leadership Is Unclaimed

44 / 66 entries flagged

35 reps awaiting an approved MAKO objection response. ROSA's 90-landmark advantage vs. MAKO's 36 is not being presented consistently. The window to claim the narrative is closing.

PRIORITY ISSUE 3

KOL and Institutional Access Blocked

46 entries — No surgeon champion

21 entries flag absence of CMO relationship. In corporate chains, the surgeon does not sign the contract — the group office does. Surgeon wins are not converting to chain-level preferred vendor status.

PRIORITY ISSUE 4

No Bundled Offer Exists to Present

42 accounts waiting

Rs. 1.6 Crore pipeline stalled. 9 underutilised robots costing Rs. 18L/year each. The field cannot negotiate what has not been defined and approved.

PRIORITY ISSUE 5

No Unified Marketing Function Owns the ROSA + Implant Story

Marketing fragmented across product lines — no single steward

KOL advisory structure has no owner. Outcomes evidence is not being produced or deployed systematically. A Unified Marketing Team (UMT) is the structural fix.

Section 2: Implant + ROSA Synergy — Current State

Why revenue is being left on the table | Five dimensions of structural misalignment

ROSA and knee implants are **one revenue system**. ROSA's 90-landmark mapping generates anatomy-specific data driving implant selection at every case. Without a joint commercial model, this value is lost.

Dimension	Current Situation	Revenue Impact
Account Ownership	ROSA team and Implant team call independently on same account	Hospital sees two vendors; total account revenue unmanaged
Target Structure	Separate targets: ROSA placements vs. implant volume	Neither team has incentive to support the other's conversion
Account Planning	No joint account plan for ROSA sites	Implant pull-through failing at 23% of ROSA accounts
Commercial Proposal	No combined proposition on the table	42 accounts waiting; Rs. 1.6 Cr pipeline stalled
Field Communication	No shared ROSA + implant narrative	50% of reps cite misalignment as primary barrier
Country Head action required: Issue directive designating Unified Revenue Leads for all 8 territories. Mandate joint account plans for all ROSA sites within 30 days. No budget required — this is a re-designation and governance change.		

Section 2: The Unified Revenue Engine — Proposed Operating Model

Three structural changes — all internal decisions, no new budget required

The fix requires **three structural changes**: a shared account, a shared plan, and a shared number. Each is an internal decision, not a budget item.

1

One Territory, One Revenue Lead

Appoint a Unified Revenue Lead (URL) for each of the 8 territories. The URL holds accountability for total revenue at every ROSA-active account — implant volume and ROSA case volume combined. The URL is a re-designation of the senior territory manager with a revised mandate. No new hire required.

Action: Country Head directive within Week 1

2

Joint Account Planning — Every ROSA Site

Every ROSA-active account requires a joint plan co-signed by the implant rep and ROSA specialist. Plan covers: ROSA case target per quarter, implant pull-through target per ROSA case, KOL champion status, CMO relationship status, and bundled offer proposal status. Reviewed monthly by URL and Regional Manager.

Action: Mandated within 30 days of URL designation

3

Shared P&L for Corporate Accounts

Apollo, Fortis, Max, and Manipal accounts move to a shared P&L model. Implant revenue from a ROSA account is credited to both the implant rep and the ROSA specialist. This removes the structural incentive to compete and creates a financial reason to co-sell.

Action: Commercial policy revision in Week 3

Section 2: Common Goals Framework — Implant + ROSA Teams

Shared targets that reward the unified outcome, not the individual product metric

Goal	Implant Team Metric	ROSA Team Metric	Shared KPI
Revenue Growth	+30% knee implant revenue at ROSA accounts	+40% ROSA case volume at installed sites	Combined account revenue vs. baseline
Pull-Through	Implant units per ROSA case >= 1.5	ROSA cases per month per installed robot >= 4	Pull-through conversion rate by territory
Institutional Access	CMO meeting at 4 corporate chains	ROSA demonstration at 4 corporate chains	LOI signed with >= 2 chains by Day 90
KOL Activation	5 surgeon champions identified per region	5 surgeon champions trained on ROSA	10 KOLs active across 8 territories
Bundle Adoption	20+ bundled proposals submitted	20+ accounts receiving bundle proposal	Bundle close rate >= 40%
Governance: Country Head chairs monthly commercial review. Pull-through rate below 1.2 implants/ROSA case triggers mandatory joint review within 10 working days — URL, ROSA Business Head, and NSH all attend.			

Section 3: ROSA 5-Year Comprehensive Warranty Programme

Converting ROSA from a capital risk to a managed clinical partnership

A **5-year comprehensive warranty** changes the group office conversation from capex evaluation to outcomes partnership. This is the commercial vehicle that opens corporate hospital procurement committees.

PROCUREMENT

Defines Total Cost of Ownership

Corporate procurement committees require a defined TCO before approving a capital item. Without a warranty framework, ROSA's TCO is undefined and unacceptable to group finance.

COMPETITIVE

Neutralises MAKO's Service Objection

Stryker MAKO field teams use service uncertainty as an active objection against ROSA. A 5-year comprehensive warranty eliminates this narrative entirely — before it is raised.

REVENUE

Protects Rs. 18L per Robot per Year

Each underutilised ROSA installation costs ZB India Rs. 18 Lakh/year in unrealised implant pull-through. A warranty that keeps the robot operational protects both the hospital's investment and ZB's recurring revenue.

INSTITUTIONAL

Creates Preferred Vendor Route

A warranty programme creates a formal, recurring service relationship with the hospital — the structural route to preferred vendor status. The ZB service team has a reason to be in the building every quarter.

Positioning language: "ROSA does not come as a piece of equipment. It comes as a five-year clinical partnership — dedicated service, latest protocols, digital care, and annual outcomes reporting from day one."

Section 3: Warranty Tier Options — Field Promotion Policy

All four tiers exist. Only one is to be promoted. This is a commercial policy, not a product limitation.

Warranty coverage is available in **four durations**. Internal pricing policy supports all four. **External promotion policy is explicit**: only the 5-Year Comprehensive tier is named or sold in any external context.

Tier	Duration	Coverage Scope	Field Promotion Policy
Standard	1 Year	Hardware warranty, response SLA only	Internal use only
Extended	2 Years	Hardware, scheduled PM visits, SLA	Internal use only
Enhanced	3 Years	Hardware, PM, software updates, SLA	On request only
Comprehensive	5 Years	Full programme: hardware, PM, software, ROSA Optimize, mymobility, annual clinical review	PROMOTE — only external tier

Field instruction: Lead with 5 years in every conversation. Never proactively offer a shorter tier. If procurement requests flexibility: "Shorter options exist, but our 5-year programme is the only one with ROSA Optimize, mymobility, and annual outcomes review — the evidence package your finance committee needs." Any deviation requires Commercial Head approval.

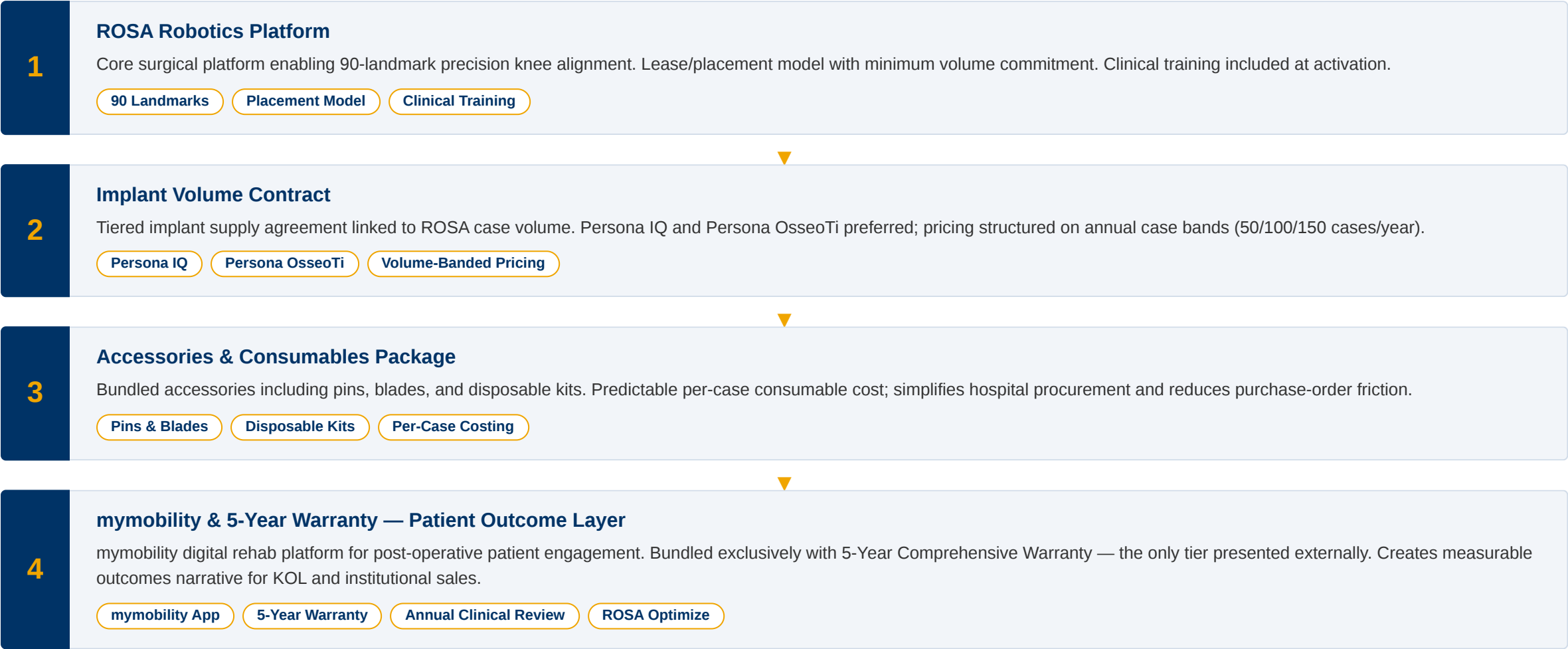
Section 3: What the 5-Year Warranty Programme Covers

Programme architecture — seven components that define the clinical partnership

Component	Coverage Detail	Commercial Value
Hardware Warranty	Full parts and labour for all ROSA system components for 5 years from installation	Removes capital risk for hospital CFO
Preventive Maintenance	Two scheduled PM visits per year with certified ZB service engineer, fully documented	Ongoing partnership; regulatory compliance support
Software Updates	All ROSA software and navigation platform updates included — no upgrade negotiation	Hospital always on latest protocol; removes future cost ambiguity
ROSA Optimize Access	Full ROSA Optimize programme — protocol documentation, case data platform, outcome reporting	Drives pull-through and outcomes evidence; no MAKO equivalent
mymobility Integration	mymobility licence for warranty period — pre-op education, post-op rehab, surgeon dashboard	Only robotic orthopaedic solution with end-to-end digital care pathway in India
Response SLA	4-hour remote response; 24-hour on-site for critical failures; 48-hour full restoration	Addresses group hospital OR downtime concern directly
Annual Clinical Review	Annual outcomes review with hospital clinical leadership using ROSA case and implant data	Deepens institutional relationship; creates KOL and reference selling evidence

Competitive advantage: Stryker MAKO requires separate service contracts, CT-based planning fees, and has no equivalent to mymobility or ROSA Optimize. The 5-year programme creates a total value gap that hardware specifications alone cannot close.

INTEGRATED OFFER STRUCTURE — FROM PLATFORM TO PATIENT OUTCOME



Bundle Offer Summary — What the Hospital Receives

FULL BUNDLE ACTIVATED BY 5-YEAR COMPREHENSIVE WARRANTY COMMITMENT

Bundle Component	What Is Included	Standalone?	Bundle Advantage
ROSA Platform Placement	Robotic surgical system, installation, and annual software update	Yes	No capital outlay; linked to volume commitment
Persona IQ / OsseoTi Implants	Full implant supply at volume-banded pricing (50 / 100 / 150 cases/yr)	Yes	10–15% cost benefit vs. catalogue pricing
Accessories & Consumables	Pins, blades, drapes, disposable instrument kits — per-case cost agreed upfront	Yes	Single PO, no stock management for hospital
mymobility Digital Rehab	Patient app, surgeon dashboard, rehab protocol library, 90-day post-op monitoring	No	Exclusive to 5-Year bundle — differentiator
5-Year Comprehensive Warranty	Full parts + labour + ROSA Optimize annual calibration + remote diagnostics	No	Only tier presented externally; GCC-backed support
Annual Clinical Review	Outcomes data review with ADGcatalyst/ZB clinical team; publication support	No	KOL activation and institutional evidence generation

Field Instruction: Always present as a single integrated offer. Do not unbundle. Shorter warranty requests redirect to the 5-Year value narrative — any deviation requires Commercial Head approval.

Unified Marketing Team (UMT) — Structure & Roles

SLIDE 11

UMT reports to Country Head — single P&L accountability for Implant + ROSA + Digital + Institutional + GCC

#	Role / Function	Primary Mandate	Key Interface
1	Head of Unified Marketing	Single owner of combined Implant + ROSA revenue target; P&L reporting to Country Head	Country Head, Sales Director
2	ROSA Clinical Marketing Manager	Clinical adoption narrative, surgeon training, ROSA Optimize programme, outcomes data	KOLs, OT Teams, Clinical Affairs
3	Implant Marketing Manager	Persona IQ / OsseoTi portfolio positioning, implant volume contracts, pricing strategy	Distributors, Purchase Committees
4	Institutional Access Manager	Apollo, Fortis, Max, Manipal chain-level agreements; NABH/JCI evidence packaging	Hospital CMO / CFO, Procurement
5	Digital Health & mymobility Lead	mymobility deployment, patient outcome tracking, digital rehab integration	Hospital IT, Patient Experience Teams
6	KOL & Advisory Board Manager	KOL engagement, evidence repository, publication support, congresses	ZB Medical Affairs, Academic Centres
7	GCC Partnership Liaison NEW	Interfaces with ZB India GCC for market intelligence, chain analytics, clinical evidence packaging, institutional briefs for Apollo/Fortis/Max/Manipal	ZB GCC India, Institutional Access Mgr

ZB INDIA GCC AS INSTITUTIONAL INTELLIGENCE & EVIDENCE ENGINE

1. HOSPITAL CHAIN PARTNERSHIPS

Target Chains

Apollo Hospitals, Fortis Healthcare, Max Healthcare, Manipal Hospitals — chain-level institutional agreements, not facility-by-facility.

[Apollo](#) [Fortis](#) [Max](#) [Manipal](#)

GCC Deliverable per Chain

ROSA outcomes dashboard (facility-level), NABH/JCI accreditation evidence pack, Total Cost of Ownership (TCO) model, co-branded institutional brief prepared by GCC analytical team.

[Outcomes Dashboard](#) [TCO Model](#) [NABH/JCI Pack](#)

2. KOL ECOSYSTEM DEVELOPMENT

Evidence Repository

GCC builds and maintains a living evidence library — real-world ROSA outcomes, peer-reviewed publications, conference abstracts — curated for India-specific surgical environments.

Data Collection & Publication Support

GCC provides data collection protocols, IRB coordination support, statistical analysis, and manuscript preparation for KOL-led publications from participating centres.

[IRB Support](#) [Statistical Analysis](#) [Publication Track](#)

GCC as Competitive Differentiator — The "Built in India" Narrative

Zimmer Biomet established its GCC in India — a commitment to local intelligence, local talent, and local outcomes. No competitor can match this depth of institutional support. The 5-Year Warranty is backed by the GCC. The message to every hospital CMO: "We are committed to year 5 — not just the sale."

DESIGN PRINCIPLES + KPI SCORECARD FOR COMBINED IMPLANT & ROSA TEAMS

DESIGN PRINCIPLES

- 1 **Shared Revenue Pool:** 30% of incentive pool is collective (Implant + ROSA combined target), eliminating internal competition.
- 2 **ROSA Activation Bonus:** Rs. 25,000 per new robot activated beyond existing base; Rs. 10,000 per robot exceeding 8 cases/month.
- 3 **Bundle Conversion Multiplier:** 1.5x incentive for accounts that upgrade from implant-only to full bundle (ROSA + implant + warranty).
- 4 **KOL Activation Credit:** Rs. 15,000 credited to field rep for each KOL who publishes or presents a ROSA case series within the year.
- 5 **mymobility Adoption:** Quarterly bonus for territories achieving >60% mymobility adoption in ROSA cases.

KPI SCORECARD — FY TARGET

KPI	Target	Review
ROSA cases/month (all territories)	120+	Monthly
New ROSA activations	6 robots	Q1 + Q3
Bundle conversion accounts	42 accounts	Quarterly
Implant revenue per ROSA case	Rs. 1.8L+	Monthly
KOL cases published/presented	8 KOLs/yr	Annual
mymobility adoption rate	60%+	Quarterly
Corporate chain agreements	2 chains	H1 + H2

Decision & Action Timeline — Country Head Mandate

SLIDE 14

8 STRATEGIC DECISIONS REQUIRED TO ACTIVATE UNIFIED REVENUE STRATEGY

#	Decision / Action Required	Owner	Timing	Enabling Outcome
1	Approve UMT Structure — appoint Head of Unified Marketing	Country Head	Immediate	Single P&L ownership; end of silo operations
2	Ratify GCC Partnership Liaison as UMT role	Country Head + GCC Lead	Immediate	Institutional brief capability for Apollo/Fortis/Max/Manipal
3	Lock 5-Year Warranty as the only external-facing tier	Commercial Head	Immediate	Consistent field messaging; eliminates warranty confusion
4	Approve Bundle Pricing Architecture (implant + ROSA + accessories + mymobility)	Country Head + Finance	Day 30	42 waiting accounts can be converted to full bundle
5	Commission chain-level institutional briefs for top 2 hospital groups	Institutional Access Mgr + GCC	Day 30	Apollo/Fortis chain agreements pipeline opened
6	Launch ROSA Optimize annual calibration for all 9 active robots	ROSA Clinical Marketing Mgr	Day 60	Rs. 1.6 Cr latent value from underutilised robots recovered
7	Activate 5 priority KOLs — evidence collection protocol signed	KOL & Advisory Board Mgr	Day 60	Publication pipeline; 46/66 accounts pending KOL activation
8	Implement unified incentive scorecard; retire separate quotas	Country Head + HR	Day 90	Team aligned on shared ROSA + implant KPIs; no internal competition

"The ROSA platform is not a product sale — it is a 5-year institutional partnership. Structure, support, and strategy must reflect that commitment."

ADGcatalyst Strategic Consulting