



 Premium Action Guide

Medical Sales: Land the Role, Fill the Pipeline, Crush Quota

Break into healthcare/medical sales and run a compliant, repeatable outreach-to-demo system. From targeting and objection handling to automation, content, and reporting — built like 100 practitioners co-authored one playbook.

 **Updated for 2026**

 **10x** Responding within 5 minutes can convert up to 10x vs 30 minutes later (source-reported).

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Start Fast

Clear first steps you can take this week.



Real Sources

Built from people who actually did it.



Honest Numbers

Source-reported pay, costs, and risks.

Get the Full Guide Vault →

 Includes checklists, scripts & source-backed insights

YOU WILL LEARN

- ☒ What you'll build
- ☒ Step 1 —  Choose your medical niche and ICP
- ☒ Platforms & tools
- ☒ Step 2 —  Build recruiter-ready assets with AI

✓ Step 3 — 🌐 Publish a one-page rep site

✓ Step 4 — 📁 Build and structure your lead list

► MODULE 01

What you'll build

A complete medical sales job-and-pipeline system: recruiter-ready assets, compliant multichannel prospecting, high-response messaging, airtight objection handling, and a speed-to-lead demo engine — all instrumented with metrics and light automation.

You'll be ready to win interviews, run live demos for practices or health systems, and show hiring managers you can build and operate a quota-carrying funnel.

- 1 Target list + ICP for healthcare buyers
- 2 Personalized outreach + video audit demos
- 3 Discovery call SOP + objection scripts
- 4 Speed-to-lead + nurture automations
- 5 Reporting dashboard with conversion metrics

► MODULE 02

Platforms & tools

Lead & Outreach

1 free · 7 paid



Apollo



Instantly



LinkedIn



Loom



Upwork



Fiverr



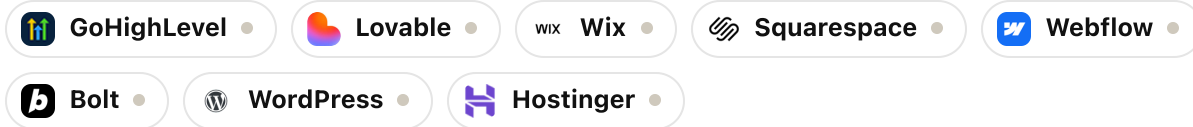
Smartlead



Cal.com

Website Builders

0 free · 8 paid



AI Models

0 free · 5 paid



Dev & Hosting

0 free · 6 paid



Automation

1 free · 3 paid



► MODULE 03

Step 1 — 🎯 Choose your medical niche and ICP

Pick one lane (device, diagnostics, SaaS, services) and one buyer type (private practices, ASC, hospital dept, MSO). Avoid low-call-volume, low-ticket niches. Define 3 expensive problems your offer solves (e.g., missed calls, no-shows, poor conversion) and the stakeholders who feel them.

Tip

Your brain will resist picking one ICP — that's normal. Specialization plus a simple, money-tied promise beats a broad pitch in healthcare.

► MODULE 04

Step 2 — Build recruiter-ready assets with AI

Ship a tailored resume, outcomes-forward LinkedIn, and a 5–10 slide deck on the buyer's pain and your solution impact. Use AI to customize quickly, but keep tone clinical and specific.

PROMPT – CUSTOMIZE MY MEDICAL SALES RESUME TO THE JOB POST

System: You are a precise resume tailor for medical/healthcare sales roles.

User: Here is my base resume: [PASTE RESUME]. Here is the job post: [PASTE JOB]. Return a one-page resume customized to this post with quantified outcomes, compliant language, and relevant keywords. Keep it factual; no exaggerated claims.

PROMPT – CREATE A 5–10 SLIDE PITCH DECK (15–30% BOOKINGS LIFT EXAMPLE-ONLY)

Create a concise deck for [PRODUCT/INDICATION] selling to [BUYER TYPE]. Slides: 1) Title with quantified outcome (example-only 15–30% lift). 2) Current state pains. 3) Economic impact. 4) Clinical/operational proof points. 5) How the solution works. 6) Workflow fit. 7) Privacy/compliance. 8) Implementation timeline. 9) Case snapshot. 10) Next step CTA.

Tip

Skip tech jargon in interviews; hiring managers care about problems, buyers, and outcomes — not meta tags or prompt engineering.

► MODULE 05

Step 3 — Publish a one-page rep site

Create a single page with your positioning, who you help, how it works, proof, and a single CTA to book a demo. Mirror high-converting structures and keep copy minimal but meaningful.

PROMPT – CLONE A PROVEN LAYOUT FOR YOUR REP SITE

Copy the design from [DOMAIN]. But the new website needs to be for a business called [YOUR NAME OR AGENCY], which is a business that builds [SERVICES OR PRODUCT DEMOS] only within [TERRITORY]. Be sure to insert beautiful images of completed projects/case assets and list out the five to 10 biggest cities in your area. As well, there should be a form where people can request more info, too. Go.

Tip

Clients judge you by visible deliverables: emails, meetings, calls, reports, configured assets. Make the CTA obvious and the page fast.

► MODULE 06

Step 4 — Build and structure your lead list

Start with 100–300 targets. Use LinkedIn-based tools for white-collar buyers (admins, directors) and Google Maps for local practices. Store structured data in a single sheet and enrich later.

TEMPLATE – LEAD SHEET COLUMNS

Lead ID, Search query, Business name, Category, Address, Phone numbers, Emails, Owner/Physician name, Team contacts, Headcount (est.), Website, City, State, Notes, Enrichment status

Tip

Filter out recruiter/job-listing domains and oversized enterprises early. Scraping dynamic sites requires a headless browser; simple HTTP often returns empty pages.

Step 5 — 🔍 Source contacts (by platform)

Find decision makers, verify emails, and capture direct dials where possible. Use one or two primary prospecting platforms to stay consistent.

Platform	What to do in this step
Apollo	Search by industry/role (e.g., Practice Manager, Director of Operations). Filter by location and company size. Save contacts; export with verified emails/phones.
LinkedIn Sales Navigator	Build account lists (hospitals, ASCs, MSOs). Use role+seniority filters. Save leads; send customized connection requests.
Google Maps	Search specialty + city. Identify clinics with few reviews, missing websites or outdated info. Add to sheet; call the listed number to qualify.

TEMPLATE — LINKEDIN CONNECTION NOTE

Subject: [Personalized hook for [Name]]

Hey [FIRST NAME], saw [CASUAL COMPANY NAME] and your role in [DEPT]. I think we'd vibe — we help [BUYER TYPE] fix [SPECIFIC PAIN] without adding tools. Open to a quick compare?

Tip

Avoid generic company facts in icebreakers. Personal nuggets (podcasts, unique background) drive higher reply rates.

Step 6 — Verify and enrich emails

Try common naming conventions, confirm via an email finder, and verify before sending. If no email is found, route to a callback for enrichment and log results.

FLOW – SPLIT ENRICHMENT SCENARIOS

Scenario A: Send leads to [EMAIL FINDER] → If verified:true, push to [INSTANTLY] list.

Scenario B: No verified email → Callback to AI enrichment (site + LinkedIn) → If found, push to [INSTANTLY]; if not, mark for phone qualification.

Tip

Do not use newsletter tools (e.g., Mailchimp/Constant Contact) for cold emails — it violates their terms. Use horizontally scaled sending to avoid reputation hits. The 'from name' is the #1 open-rate lever.

► MODULE 09

Step 7 — Write messages that win medical responses

Use short, specific, money-tied copy. Personalize one or two lines with AI, keep the rest human. Add cognitive biases sparingly (anchoring, first-impression, mere-exposure).

MESSAGE – AFTER-HOURS COVERAGE (CLINICS/PRACTICES)

Subject: [Personalized hook for [Name]]

Hey [NAME], noticed you might be missing leads after business hours – nights/weekends go to voicemail. We help [SPECIALTY] automate follow-up so more inquiries become booked patients, no extra tools. Open to a 10-min compare?

MESSAGE – WEBSITE FOUND (OPTIMIZE CONVERSIONS)

Subject: [Personalized hook for [Name]]

Hey [NAME], I was searching for [SPECIALTY] in [CITY] and came across your site. Great reviews. I spotted a few things that may be costing booked patients, so I drafted an optimized version built for more calls and appointments. Ok to send the link?

MESSAGE – NO WEBSITE (STARTER ASSET)

Subject: [Personalized hook for [Name]]

Hey [NAME], I tried finding your website while searching for [SPECIALTY] in [CITY] but couldn't find one. I went ahead and built you a simple version to capture calls/appointments. Mind if I send a quick look?

MESSAGE – LEAD-GEN POSITIONING

Subject: [Personalized hook for [Name]]

Hey [NAME], I help [SPECIALTY/DEPT] turn website visitors and calls into booked appointments without more ad spend. Would you be open to seeing how that could work for [PRACTICE/DEPT]?

MESSAGE – AI RECEPTIONIST (ANCHOR VS STAFFING)

Subject: [Personalized hook for [Name]]

Hey [NAME], noticed missed calls after hours. I can add a system that answers every call and books appointments automatically so you don't lose leads. It takes ~10 minutes to set up. Want me to add it for you to test?

TEMPLATE – AI ICEBREAKER PROMPT (JSON RESPONSE)

Using this LinkedIn profile and website: [LINKEDIN URL] [SITE URL], write a one-sentence icebreaker in a Spartan, casual tone. Avoid generic company facts; reference something personal or specific. Return JSON only:
{`"icebreaker": "..."`}.

TEMPLATE – RESEARCH-DRIVEN PERSONALIZATION

Given this message template: [TEMPLATE], research [BUSINESS NAME] online and find one specific, money-tied detail about their services, reviews, or booking process. Write a succinct, non-flamboyant opener using that detail.

VERBATIM COLD_EMAIL – EXAMPLES (EXAMPLE-ONLY; ADAPT TO COMPLIANCE)

Subject: [Personalized hook for [Name]]

Hey Nick, love your channel man. Very no BS and has helped me get started in management consulting. Think I can help you with something and maybe return a bit of the favor you've unwittingly done me.

I currently work with a 10 mil sub YouTuber, Mr. X, to help him build landing pages. We have made 3 mil in the last month alone.

I went through your landing page on Maker School and frankly you are bleeding money, my friend. I'm so confident that even a couple minor changes here could fix this that I bet I could generate at least 100k for you in the next 60 days. I do this 100% up front, no strings, would take 5 minutes of your time and only if I hit 100k would I ask you for small cut, maybe 15 to 20%.

Would you be open to a 50-minute call? If so, how's 3:30 p.m. tomorrow?

Peter

VERBATIM COLD_EMAIL – 20 MEETINGS (EXAMPLE-ONLY; ADAPT TO COMPLIANCE)

Subject: I will get you 20 booked meetings in the next 60 days or you don't pay
I will generate you 20 booked appointments in the next 60 days or you don't pay.

VERBATIM COLD_EMAIL – \$10K IN 30 DAYS (EXAMPLE-ONLY; ADAPT TO COMPLIANCE)

Subject: I will help you close \$10,000 in the next 30 days or I'll keep working for free until I do
I will help you close \$10,000 in the next 30 days or I will continue working for free until I get them for you.

VERBATIM COLD_EMAIL – 100 SEO+AI POSTS (EXAMPLE-ONLY; ADAPT TO COMPLIANCE)

Subject: I will write your next client 100 free SEO and AI optimized blog posts
I will write your next client 100 free SEO and AI optimized blog posts you can use to cross-sell them or value your offer. Plus, give them an in-depth SEO audit for free for \$0. Only if you absolutely love it will I ask you to pay mostly on performance, and I won't unless you're 100% satisfied.

VERBATIM COLD_EMAIL – AUTOMATE BRAND SNIPING (EXAMPLE-ONLY; ADAPT TO COMPLIANCE)

Subject: I will completely automate brand sniping for your next campaign for \$0
I will completely automate brand sniping for your next campaign for \$0. It'll cost you nothing and only if you love the system would I ever ask you to pay.

VERBATIM COLD_EMAIL – 10 YOUTUBE SCRIPTS (EXAMPLE-ONLY; ADAPT TO COMPLIANCE)

Subject: I will write you 10 YouTube video titles, outlines, and scripts for free in the next 72 hours
I will write you 10 YouTube video titles, 10 YouTube video outlines, and 10 YouTube video scripts for free in the next 72 hours. Only if you absolutely love them would I ask you to pay.

VERBATIM COLD_EMAIL – FREE WELCOME SEQUENCE (EXAMPLE-ONLY; ADAPT TO COMPLIANCE)

Subject: I'll write you a free welcome sequence plus email course the next 72 hours

I'll write you a free welcome sequence plus email course the next 72 hours guaranteed to make you X the next 30 days or you wouldn't pay a cent.

VERBATIM COLD_EMAIL – LINKEDIN FOUND (EXAMPLE-ONLY; ADAPT TO COMPLIANCE)

Subject: [Personalized hook for [Name]]

Hi I found you on platform I help Niche do really cool thing last year I made amount of money for other clients and I'm confident I can do the same for you I guarantee and if you don't love it you wouldn't pay a cent would this be worth a call

In practice:

Hi I found you on LinkedIn I help B2B agencies make \$50,000 a month or more in an added Revenue last year I made \$2.3 million for insert big client name here and I'm confident I can do the same thing for you I guarantee you at least 20 booked meetings and a three times Roi and if you don't absolutely fall in love with it you won't pay a scent would this be worth a quick call

VERBATIM COLD_EMAIL – SAMPLE JOB RESPONSE (EXAMPLE-ONLY; ADAPT TO COMPLIANCE)

Subject: [Personalized hook for [Name]]

Hey how's it going my name is Nick I just came across your job post looking for a python developer splitting large CSV files for context I run a YouTube channel with 35,000 subscribers and I make thank you rise about \$130,000 a month currently I'm talking about stuff like this development and and Automation and so on and so forth what I want to do in this video is actually just want to create the thing that you're asking for or at least show you how to create it get you about half the way there so that if you do choose to work with me it's going to be easier for me to do it's going to be easier for you to do okay great so here I would open up my vs code I would create a sample CSV file and then I would literally try doing the thing that the guy is hiring me for basically

VERBATIM DM — FOLLOW-UP NUDGE

Subject: [Personalized hook for [Name]]

Hey Peter you know what were you planning on using my sop for it's super cool that you know you do X Y and Z just wanted to just wanted to see if I could still help something along those lines

Tip

AI is flexible — add lane-guards. Personalize only the opener or one line; let a human write the rest to avoid flamboyant tone. If stuck, have ChatGPT ask you 2–3 questions before drafting.

► MODULE 10

Step 8 — Go omnichannel and warm your network

Send your best asset via email, LinkedIn DM, and (if relevant) Instagram or X. Ask your warm network for intros and post a small, specific ask to trigger interest.

TEMPLATE — WARM NETWORK OPENER

Subject: [Personalized hook for [Name]]

Hey [NAME]. I just started helping [SPECIALTY/DEPT] get [SPECIFIC RESULT]. Do you know anyone who might need that?

TEMPLATE — MICRO-POST FOR WARM LEADS

I'm looking to help five [NICHE] owners get 10–15 leads per month using a simple three-step system without paid ads. If that sounds useful, DM me "interested" and I'll walk you through it free.

Tip

The final line ('Comment/DM to get...') is the microtrigger — it drives replies and lets you measure interest.

► MODULE 11

Step 9 — Send a 2–3 minute Loom audit/demo

Record a short video showing the current state and a tangible fix or demo. End with a no-pressure CTA to compare options, not a hard close.

STRUCTURE – 3-PART LOOM

- 1) 15s intro: what you found and why it matters.
- 2) Evidence: Google listing, review count, booking flow, competitor compare, site issues.
- 3) 30s: Biggest problem + how you'd fix it; CTA to a quick compare.

TEMPLATE – 1-MINUTE PRE-MEETING LOOM NUDGE

Subject: [Personalized hook for [Name]]

Hey [NAME], looking forward to [DATE]. In 60s: what we'll cover, the outcome to expect, and a quick look at [ASSET]. See you then.

Tip

A 1-minute Loom before meetings significantly boosts show rates and takes ~5 minutes to make.

► MODULE 12

Step 10 — Book the meeting and handle objections

Use one clear hook, then handle the most common pushbacks. If timing isn't right, get a small 'yes' (send one useful thing) and set a light follow-up path.

PHONE HOOK — EXAMPLE

Subject: [Personalized hook for [Name]]

Hey, this is [YOUR NAME] with [COMPANY]. I'm not sure if you've heard our name tossed around, but we help [BUYER TYPE] increase booked appointments without extra ad spend. We're offering quick, no-pressure audits right now.

OBJECTION — 'NOT INTERESTED / ALREADY HAVE SOMEONE'

That's great. Most of the [PRACTICES/HOSPITALS] we work with already had someone, too. Would it be okay if I showed you one thing we do differently – just so you have something to compare to? No pressure either way.

OBJECTION — 'WE TRIED THIS BEFORE'

That's actually useful to know. A lot of teams said the same before we started. Usually the issue is the system, not the idea. Would it be okay if I showed exactly how we handle that so you can see what's different?

OBJECTION — 'NOT LOOKING / BAD TIMING'

Totally understand – timing matters. Would it be alright if I sent one quick thing that's useful whenever the timing is right? Takes about two minutes to look at. No pressure.

IF THEY STILL SAY NO – OFFER THE AUDIT

In that case, I think the audit could still be beneficial. It's a quick 15-minute call showing how peers use similar systems. We do it free to build relationships because most teams will adopt in the next 12–18 months. Would a short slot sometime this week be fair?

ASK FOR THE SALE EXPLICITLY (PILOT/TRIAL)

Subject: [Personalized hook for [Name]]

Hey [NAME], are you ready to move forward with this [PILOT/TRIAL] tomorrow? If you'd like, I can set this [RECEPTION/BOOKING WORKFLOW] up for you tomorrow so you can see it live.

Tip

Don't over-explain when you hear 'not interested.' A small ask (see one thing / send one item) keeps the door open and uses commitment/consistency bias.

► MODULE 13

Step 11 — Run discovery the buyer-friendly way

Structure calls to learn, quantify, and align on outcomes before presenting. Confirm urgency and next steps clearly.

SOP – DISCOVERY CALL

- Build rapport.
- Ask why your note stood out.
- Diagnose problems and cost (missed calls, no-shows, conversion leaks).
- Confirm urgency/timeline.
- Share relevant experience and a short demo.
- Agree on next step or proposal.

TIME ALLOCATION – 70/20/10

70% discovery questions. 20% solutions framed by outcomes. 10% objections/next steps.

MANAGE TIMING – KITCHEN/REFRIGERATOR/FREEZER

Kitchen table: decision soon. Refrigerator: decision in months. Freezer: decision ~year. Set nurture cadences accordingly.

Tip

Clients don't need technical deep-dives. Keep it problem → impact → workflow fit → next step.

► MODULE 14

Step 12 — ⚡ Build a speed-to-lead workflow

Ensure every inquiry gets a personalized follow-up in seconds. Route to the right rep, confirm meetings, and stop sequences when a reply arrives.

WORKFLOW – SPEED-TO-LEAD

Capture lead → qualify basics → route to owner → auto-send personalized reply in seconds → stop if reply/booked → notify team in Slack.

SETUP – GOHIGHLEVEL QUICKSTART (SOURCE-REPORTED TIMES)

Open HighLevel (2m) → Import template (30s) → Add business info (5m) → Activate workflows (2m) → Add logo/colors (5m) → Connect calendar (5m). ≈20 minutes total.

Tip

Respond in under 5 minutes — it can be up to 10x more effective (source-reported).

► MODULE 15

Step 13 — Automate replies with Make.com + AI (optional, powerful)

Use Make.com to orchestrate enrichment, AI-written replies, and CRM updates. Start simple; add delays and fallbacks. Keep emails plain text for deliverability.

BUILD – CORE MAKE.COM FLOW

Trigger (new lead) → OpenAI (GPT-4.1) craft reply from website/notes → Gmail send (plain text) → Slack notify → Delay 4m → Send thank-you → Delay 3m → Send next-steps → Update CRM stage.

PROMPT – SUCCINCT REPLY GENERATOR

System: Write a short, specific reply using [FIRST NAME], [COMPANY], and [UNIQUE VALUE] from this site text: [SCRAPE]. No fluff. End with one clear CTA to book or reply.

FALLBACK – NO SITE TEXT PARSED

If no website data, send a human-sounding templated email using available fields like [FIRST NAME] and [PHONE]. Keep it personalized but concise.

EMAIL API – OAUTH SETUP (GOOGLE CLOUD)

Create new project → Enable Gmail API → Configure OAuth consent → Publish app → Create OAuth client credentials with Make.com redirect URL → Use 'Make an OAuth 2.0 request' module if needed.

PIPELINE WATCHER

Set a second automation to watch deal stages. On 'Request Trial' → trigger a paid-trial form email; on 'No Show' → trigger reschedule sequence; stop sequences when a reply occurs.

Tip

Use delays between emails; send plain text to avoid weird formatting. If 'unknown mailbox' errors appear, verify mailbox connection and target folder.

► MODULE 16

Step 14 — Track outcomes and report daily

Instrument your funnel end-to-end. Roll up daily metrics and push formatted updates to Slack. Back up your data and evaluate performance with objective checks.

METRICS – TRACK PER CHANNEL

Open rate, Response rate, CTR, Booked calls, Cost per lead, Conversion rate, Cost per acquisition, Proposals sent/accepted, Closed deals, Inbound leads.

AUTOMATION – INTERNAL REPORTING

Aggregate from CRM + email + calendar → analyze anomalies → send a daily Slack report to the team without forcing new tools (source-reported 45 minutes/day saved).

DATA HYGIENE – 3-2-1

3 copies, 2 different formats, 1 off-site backup.

Tip

Use automated measurement tools (e.g., Lighthouse for page speed, API analytics for reply rates) and define precise eval criteria to match your quality bar.

► MODULE 17

Step 15 — Proposals, pilots, and pricing anchors

For trials/pilots or contractor scenarios, send a concise proposal with deliverables, outcomes, and timeline. Anchor against status-quo costs. Work backward when building proposal automations.

ANCHOR – AI RECEPTIONIST VS STAFFING (EXAMPLE-ONLY)

Many teams pay ~\$2,500/month for front desk staff plus ~\$2,500/month for after-hours answering. Our automated coverage replaces gaps and routes to staff, often at a fraction of the combined cost (example-only, outcomes vary).

GENERATOR – PROPOSAL PROMPT (RETURN JSON)

Create a high-quality, specific proposal from this form data: [JSON FIELDS]. Return all fields in one JSON object: {title, client, scope, outcomes, timeline, pricing, next_steps}. Keep language precise and compliant.

AUTOMATION – BUILD BACKWARDS

Start with email send module → add Google Slides generation → then AI content → then data sources → finally triggers/trackers.

Tip

Legal docs add friction internationally; for small to midsize accounts, money received is often the stronger signal. Always follow your compliance requirements.

► MODULE 18

Step 16 — Train teams and validate adoption

Support HCP/admin adoption with short, structured trainings. Offer quick quizzes and share performance reports to reinforce behavior change.

RUN A QUICK TRAINING

Create classroom → Set time, duration, roster, coach → Add Zoom/Meet link → Create.

Create quiz → Set attempts, schedule, time limit, points → Assign.

Share performance: In academy, open student → Three dots → Student report → Copy URL → Share.

ONBOARDING CALL SCRIPT

Thanks for partnering → Review schedule and timelines → Communication expectations → Any platform signups + 2FA → Q&A → Next steps email.

Tip

Clients expect more communication than they receive; increasing frequency improves retention and upsells.

► MODULE 19

Step 17 — Build your watering hole (inbound engine)

Publish useful insights for your ICP on one channel consistently. Drive traffic to a single opt-in page and nurture with your best content.

90-DAY CADENCE

Post one video per week + promote a relevant lead magnet in each + send one helpful email per week. Build a warm, problem-aware list.

CONTENT FORMATS

- Search tutorials (trust starters)
 - Credibility builders (proof points)
 - Deep dives (differentiators)
- Route all to one page → tag by source → auto-nurture.

VIDEO HELPER

Enter a video idea into your faceless video agent → generate hooks → full script → voiceover → visuals. Optionally summarize source videos quickly.

Tip

Media amplifies what exists: clear offers get amplified; unclear offers amplify confusion. Inbound builds slower; outbound starts now — do both.

► MODULE 20

Step 18 — Demo after-hours coverage (voice/chat)

Show a live 'never-miss-a-lead' demo: voice agent + site chat + automated follow-up. Price-anchor against current answering costs and book a short trial.

OFFER — CONNECTED SOLUTIONS BUNDLE

AI phone answering, live website chatbot, automated follow-ups, review generation, staff notifications, lead segmentation.

VOICE AGENT SETUP (EXAMPLE WORKFLOW)

Create agent → Name it → Select AI voice → Configure: collect caller info + reason → Connect to calendar.

If using a programmable voice API, set a system prompt (agent identity/goals) and POST a minimal body (dimensions, voice id, input text). Poll for call details (two API requests needed).

Tip

Use the simplest tool that works — you don't need a 'Ferrari model' to book calls. Host audio on S3/Dropbox instead of Google Drive for public access.

► MODULE 21

Step 19 — Agentic workflows + AISDR (advanced)

Move from manual hustle to agent-orchestrated fulfillment. Plan, then grant execution permissions. Test commands via chat or Telegram before scaling.

DO FRAMEWORK

Directive (precise instructions) → Orchestration (agent manages steps) → Execution (scripts run by the agent).

AISDR – LINDY SETUP

Lead finding → Qualification → Research → Personalized emails → Objection handling → A/B tests. Upload inbox exports as knowledge base. Remember Lindy context stacks across nodes.

ICEBREAKER SHEET

Create 'multi-line icebreaker generator' with columns: URL, First name, Last name, Email, Website URL, Headline, Location, Phone, Multi-line icebreaker.

PLAN MODE FIRST

Have the agent draft a detailed plan and questions (plan mode) before enabling bypass/auto-execution.

Tip

Use Cloud Code (or similar) to fix logic/data errors directly. Prompts are noisy — evaluate repeatedly before trusting at scale. Computer-use features may be off by default; enable explicitly.

► MODULE 22

Step 20 — Optional: Upwork channel to practice selling fast

Use Upwork to sharpen prospecting and demos. Ship custom Looms with each proposal and follow up via multiple channels for visibility.

PROFILE SETUP

Fill all fields (video, languages, education, portfolios, skills, project catalog, testimonials, certifications, employment). Use keyword-rich titles and visible social proof. Keep the 'online' badge active.

APPLY LIKE A PRO

Apply to 3–5 jobs/day → Create a custom asset from the job post using AI → Attach Google Doc + Loom → Send via platform and a second channel.

Tip

Being upfront about being new can earn leniency. Many stall at \$3–4k/month from lack of productization, lead gen, and retention — practice those.

► MODULE 23

Step 21 — Retain, expand, and reactivate

Turn pilots into ongoing work. Reactivate old databases, send follow-ups that stop on reply, and grow into adjacent problems. Document wins as case studies.

DATABASE REACTIVATION

Segment by drop-off stage → Personalize based on history → Restart conversations → Re-qualify warm leads.

CASE STUDY ASK

Subject: [Personalized hook for [Name]]

Hey [CLIENT], I'm glad we achieved [SPECIFIC RESULT]. Would you mind if I documented this as a short case study? It'll help others in the same spot.

WARM OPERATIONS BUNDLE (EXAMPLE)

Appointment booking automation, no-show recovery, estimate follow-up, review generation, payment collection.

Tip

Retention beats acquisition. Converting cold → retainer is hard; one-time project → retainer converts better (example ~9% overall).

► MODULE 24

Step 22 — 12-month plan to shift outbound → inbound

Blend channels and compound trust. Outbound starts revenue; inbound sustains it. Keep learning boring but critical sales routines.

TIMELINE

Months 1–3: Warm outreach + content basics. Months 4–6: Mixed outreach + early inbound. Months 7–12: Mostly inbound + referrals.

Tip

Growth solves many problems: it lets you choose better clients/roles, simplify systems, and invest in what works.

► MODULE 25

Mistakes to avoid



WRONG TOOLS FOR COLD OUTREACH

Mailchimp/Constant Contact prohibit cold to scraped/purchased lists — accounts can be suspended.



OVERBUILDING BEFORE SELLING

Sell before you build. Shipping pilots fast beats weeks of unseen backend work.



TALKING TECH, NOT OUTCOMES

Deep dives on SEO tags or prompt jargon lose buyers. Keep it problem → impact → workflow.



SPRAY-AND-PRAY EMAILS

Over-automation triggers blocks. Personalize a line, keep tone human, use plain text.



SLOW FOLLOW-UP

Past 5 minutes, conversion drops sharply (source-reported). Automate speed-to-lead.



ONE-RUN AI EVALS

Prompts are noisy; test repeatedly. Use objective eval criteria to avoid false wins.



TRYING TO BE EVERYTHING

One niche, one system. Overstuffing offers confuses local buyers and stalls deals.



IGNORING REGULATED OVERHEAD

Healthcare can require HIPAA-compliant tools and adds 5–10x work without proportional pay. Scope wisely.

Salary Estimate

\$500–\$3,000/mo

Example tiered monthly service price points used by sellers (source-reported/example-only).

Annual ÷ 10

Offer price often set as annual outcome divided by 10 (source-reported/example-only).

\$25,000/mo

Five clients at \$50,000/year each, annualized (source-reported/example-only).

\$33,829/mo

Example added monthly value from AI-led lead gen for a B2B agency (source-reported/example-only).

**\$100k–\$250k/mo
per person**

Solo operators reported potential with automated distribution (source-reported/example-only).

► **MODULE 27**

Resources

RESOURCES



MedReps

Medical/healthcare sales job board. ↗



**FDA 510(k) Premarket Notification
Database**

Research competing devices and clearances. ↗



NPPES NPI Registry

Find provider details and locations. [↗](#)



CMS Care Compare

Hospital and facility quality data. [↗](#)



Open Payments (Sunshine Act)

View industry payments to physicians/facilities. [↗](#)



Becker's Hospital Review

Healthcare news and hospital insights. [↗](#)



MassDevice

Medical device industry news. [↗](#)



Premier Inc.

GPO ecosystem to understand purchasing. [↗](#)



Vizient

GPO and health system analytics context. [↗](#)



HealthTrust

GPO procurement landscape. [↗](#)



HIMSS

Health IT knowledge and community. [↗](#)



Indeed

General job search for medical sales roles. [↗](#)

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