RevRx AI Consulting

MEDTECH SALES LEADERSHIP GUIDE

MedTech Sales Leader's AI Implementation Playbook

Your reps are already using AI. Give them the rules, the prompts, and the checks.

For sales leaders who want AI to save time without adding risk.

Pick · Guard · Pilot · Verify · Coach · Scale

More Tools, Same Results

Most sales teams don’t fail at AI because the tools are bad. They fail because no one set the rules, picked the use cases, or checked the work.

- [ ] Reps use different AI tools with no approved list.
- [ ] No one has said what data can and can’t go into AI tools.
- [ ] AI-written emails go out without a human check.
- [ ] Reps don’t share prompts that work.
- [ ] No one tracks whether AI saves time or helps win deals.
- [ ] Some reps avoid AI because they don’t trust it.

Two or more checks means you need a plan before you need more tools.

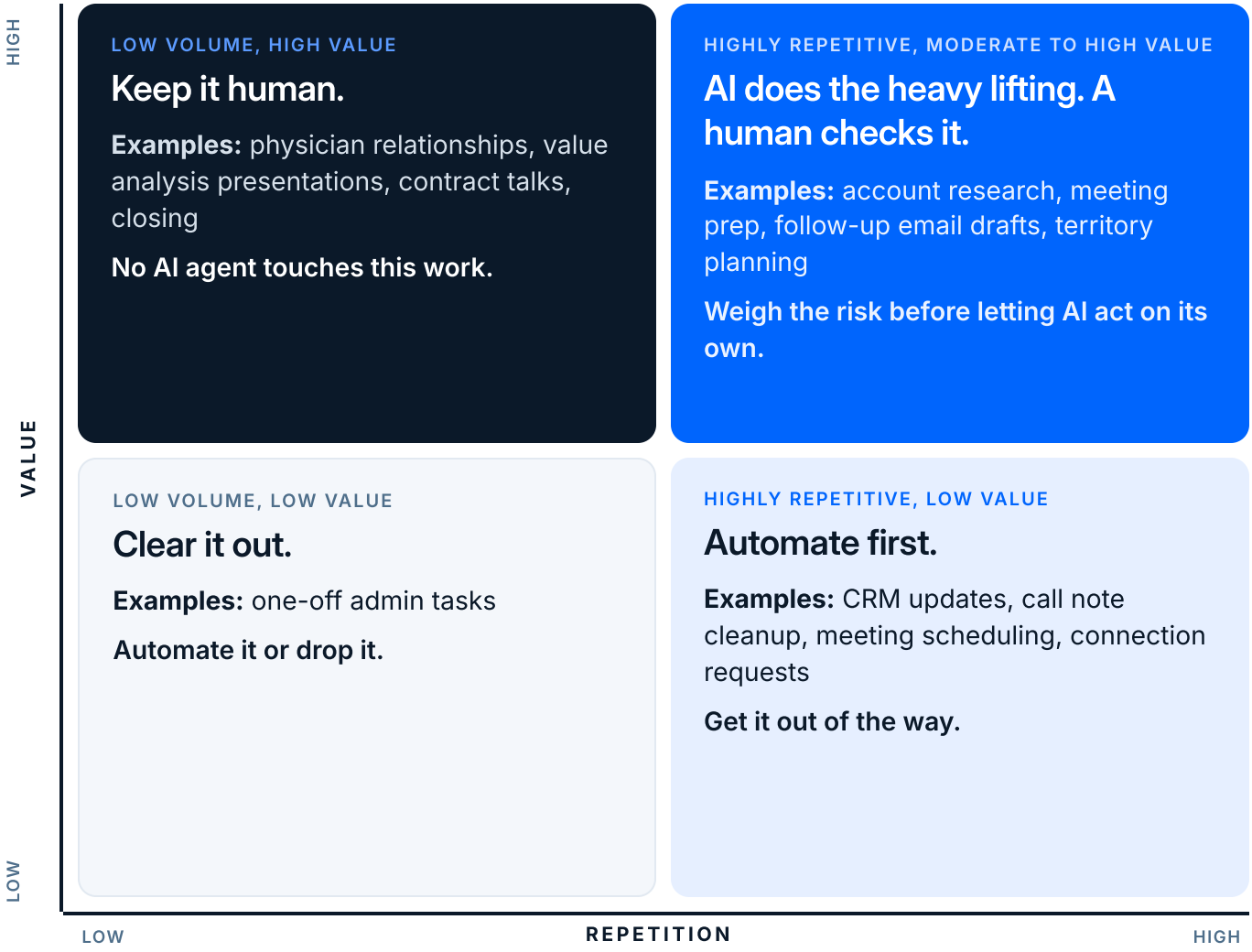
AI should help your reps do more of what matters, not replace the people your customers trust.

COPY THIS PROMPT INTO YOUR AI TOOL. FILL IN THE BRACKETS.

I lead a **[size]**-person MedTech sales team selling **[device category]**. Here is how my team uses AI today: **[describe tools, uses, and any rules]**. List the biggest risks, the quickest wins, and the first three steps I should take. Ask me questions if you need more detail.

Sort the Work Before You Add the Tool

Sort every sales task by two questions: how often is it repeated, and how much value does it create? The answers tell you what to automate, what to assist, and what to keep human.



Start your pilot in the top-right box. That is where AI saves the most time on work that matters.

COPY THIS PROMPT INTO YOUR AI TOOL. FILL IN THE BRACKETS.

Here is a list of tasks my sales team does each week: **[list tasks with how often each happens]**. Sort them into four boxes by repetition (high or low) and value (high or low). For each box, say whether to automate, have AI assist with human review, keep it human, or clear it out. Explain each choice in one line.

Rules First, Tools Second

Write these rules down before the pilot starts. Share them with every rep. Review them every quarter.

ALLOWED	ALLOWED WITH REVIEW	NOT ALLOWED
Researching public information on accounts	Emails and messages to customers	Entering patient information
Summarizing your own meeting notes	Account plans and territory plans	Entering confidential pricing or contract terms into unapproved tools
Drafting internal agendas	Proposal and presentation drafts	Making clinical or product claims not in your approved materials
Organizing CRM notes	Coaching feedback	Sending AI-written content without a human check

Data rules

- Use only the AI tools your company approves.
- Never enter patient information.
- Never enter another customer's confidential information.
- Use only product and clinical claims from your approved, reviewed materials.
- Check every fact before it goes to a customer.

Have your compliance, legal, and IT teams review these rules before rollout.

COPY THIS PROMPT INTO YOUR AI TOOL. FILL IN THE BRACKETS.

Create an approved-use-case policy for AI in a MedTech field sales organization. Cover account research, call preparation, email drafting, confidential information, review, and prohibited uses.

Five Places AI Saves Your Reps Time

1

Account research

AI DOES
summarizes public information on a hospital or system.

REP DOES
picks what matters for the next meeting.

CHECK
confirm every fact with the source link.

2

Territory planning

AI DOES
sorts accounts by the criteria you give it.

REP DOES
adds local knowledge AI can't see.

CHECK
the manager reviews the final plan.

3

Meeting prep

AI DOES
drafts an agenda, questions, and likely concerns by role.

REP DOES
tailors it to what they know about the people.

CHECK
remove anything you can't confirm.

4

Follow-up drafting

AI DOES
drafts a follow-up from the rep's own notes.

REP DOES
edits for tone and accuracy.

CHECK
no claims outside approved materials, and a human sends it.

5

Coaching

AI DOES
summarizes call notes against your sales process.

MANAGER DOES
uses the summary to coach, not to score.

CHECK
the manager confirms the summary with the rep.

COPY THIS PROMPT INTO YOUR AI TOOL. FILL IN THE BRACKETS.

For a MedTech rep selling **[device category]** in **[territory]**, suggest how AI could help with account research, territory planning, meeting prep, follow-up drafting, and coaching. For each, list what AI does, what the rep does, and the check before anything reaches a customer.

Five Prompts Your Reps Can Use Today

Give every rep the same starting prompts. Each one lists what to put in, what comes out, and the check before it's used.

1 Account research

"Summarize public information on **[hospital or system name]** that matters for selling **[device category]**: size, service lines, recent news, and leadership changes. Give a source link for every fact. If you can't find a source, say so."

YOU PROVIDE	YOU GET	CHECK BEFORE USE
account name and device category.	a one-page account summary with sources.	**open every source link and confirm.**

2 Territory planning

"Here are my accounts with **[case volume, contract status, champion, last contact]**: **[paste list]**. Rank them into three groups: focus now, nurture, and low priority. Explain each choice in one line. Flag missing data instead of guessing."

YOU PROVIDE	YOU GET	CHECK BEFORE USE
an account list with your data.	a ranked list with reasons.	**your manager reviews the ranking.**

3 Meeting prep

"I am meeting with **[roles]** at **[account]** about **[device]**. Draft a short agenda, five open questions, and the concerns each role is likely to raise. Do not invent facts about the people or the account."

YOU PROVIDE	YOU GET	CHECK BEFORE USE
roles, account and goal.	an agenda, questions and likely concerns.	**remove anything you can't confirm.**

4 Follow-up email

"Using my notes from today's meeting **[paste notes]**, draft a short follow-up email that recaps what we agreed, lists next steps with owners and dates, and asks one question. Use only what is in my notes. Do not add product claims."

YOU PROVIDE	YOU GET	CHECK BEFORE USE
your meeting notes.	a follow-up email draft.	**read it fully, confirm the facts, and send it yourself.**

5 Call review for coaching

"Here are my notes from a sales call **[paste notes]**. Compare them to our sales stages **[paste stages]**. List what went well, what was missed, and one question I should ask next time. Keep it short."

YOU PROVIDE	YOU GET	CHECK BEFORE USE
call notes and your sales stages.	a short coaching summary.	**review it with your manager.**

COPY THIS PROMPT INTO YOUR AI TOOL. FILL IN THE BRACKETS.

Draft five copy-ready AI prompts for **[device category]** field reps, each with inputs, expected output, source-verification requirements, and a human approval checkpoint.

Start Small, Then Prove It

Run a short pilot with a few reps before you roll out to the whole team. Decide what success looks like before you start.

AI Pilot Plan

Use cases (pick 1 or 2) _____

Pilot reps _____

Pilot length _____

Approved tools _____

Success measures

- Time saved per rep per week (reported by reps) _____
- Quality of outputs after review (manager score) _____
- How often reps use it _____

Weekly check-in day and time _____

Decision date _____

Decision ☐ Roll out ☐ Refine and retest ☐ Stop

COPY THIS PROMPT INTO YOUR AI TOOL. FILL IN THE BRACKETS.

Design a **[length]** AI pilot for **[number]** MedTech sales reps using AI for **[use cases]**. Include the approved tools, the rules, how we measure time saved and output quality, the weekly check-in agenda, and how we decide to roll out, refine, or stop.

Make It a Habit, Not a Launch

AI sticks when managers coach it every week, the same way they coach calls and pipeline.

Weekly manager rhythm

1
Review two AI-assisted outputs per rep.

2
Ask: “What did you check before you used this?”

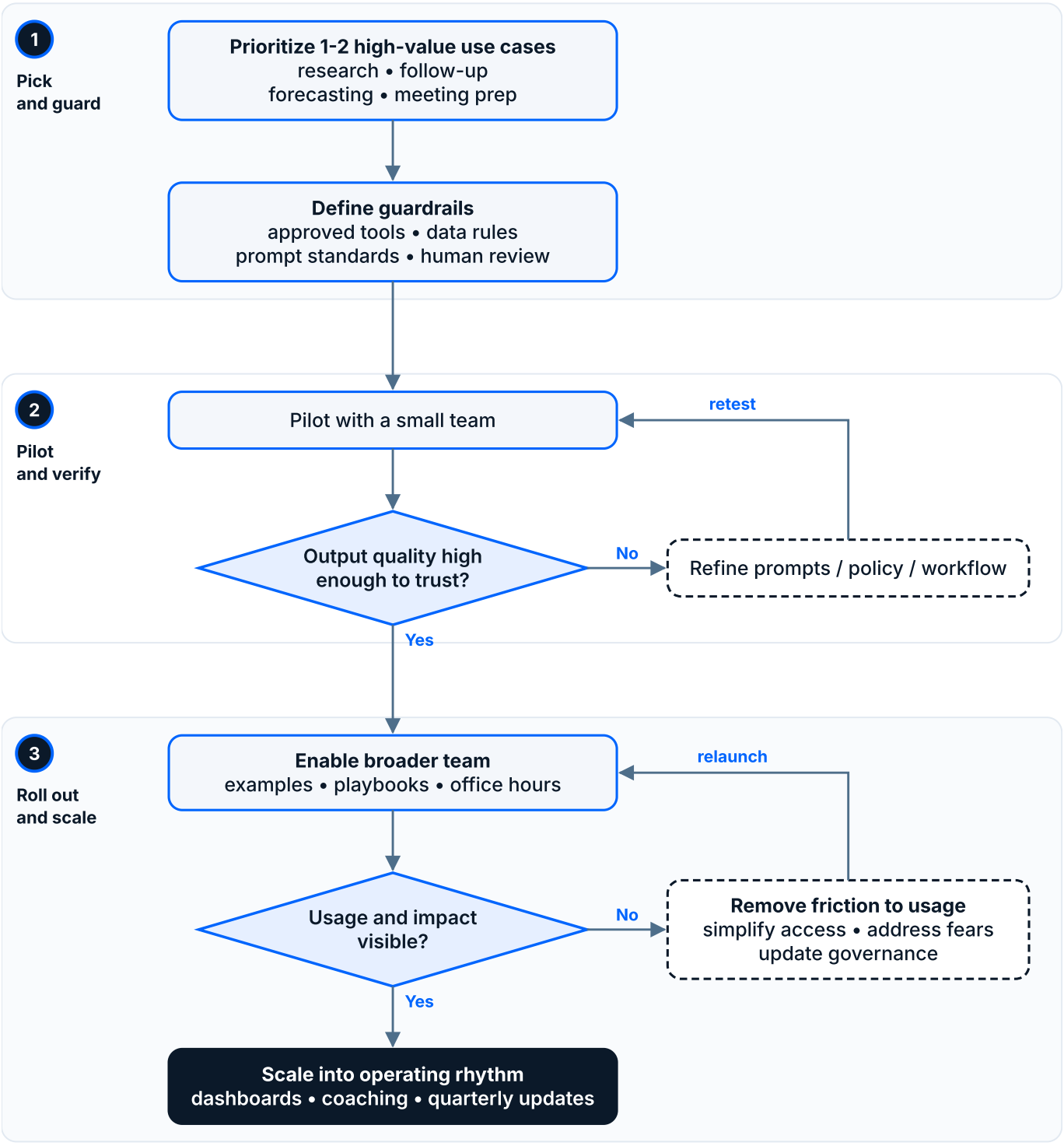
3
Share one prompt that worked with the whole team.

WHAT TO WATCH	HOW TO MEASURE	WHY IT MATTERS
Usage	How often reps use the approved prompts	Shows whether reps trust the process
Time saved	Hours saved per week, reported by reps	Shows the time freed for selling
Quality	Manager review score on outputs	Keeps the work accurate and on-message
Rule follow-through	Outputs checked before use	Keeps risk low
Selling time	Customer-facing time per week	Shows whether time saved goes to customers

COPY THIS PROMPT INTO YOUR AI TOOL. FILL IN THE BRACKETS.

Here are this week’s AI-assisted outputs from my rep **[paste examples]**. Review them for accuracy, tone, and whether they follow our rules: **[paste rules]**. Give me three coaching points and one example of what good looks like.

From First Use Case to Team Habit



Solid boxes are the main path. Dashed boxes are where you stop and fix before moving on.

09 | NEXT STEP

Find Where AI Can Help Your Team Sell

RevRx AI helps MedTech sales teams put AI to work with clear rules and real results.

STEP 1

Take the Revenue Friction Scorecard

Answer a few short questions and see where friction is slowing your revenue path.

Take the Revenue Friction Scorecard

revrxai.com/medtech-tools

STEP 2

Book a Discovery Call

A 30-minute call to walk through where AI fits in your sales process.

Book a Discovery Call

https://api.revrxai.com/widget/bookings/30-minute-meeting-with-terryrovrku

RevRx AI Consulting

Terry Coutsolioutsos
Founder and Revenue Architect
linkedin.com/in/terry-coutsolioutsos/
revrxai.com | 941-400-1352