The Health Tech Sales Audit

A 10-minute self-assessment for health tech founders and commercial leaders.

Health plans and health systems are flooded with compelling AI-driven solutions. Every week brings new platforms, new capabilities, new vendors - all with real ROI and solid proof points. Being worth doing used to be enough to get a deal done. Not anymore. This audit shows you where your sales approach is working, and where it's costing you deals you should be winning.

Answer honestly. "Somewhat" counts as a NO. Then count up your NO answers.

1. YOUR IDEAL CUSTOMER

Q1. Can you name the specific job title of the person who signs the contract? Not your champion, but the economic buyer? *e.g., CMO, VP Finance, Medical Director*

Yes ◯ No ◯

Q2. Do you know the top three objections that buyer raises? And do you have a specific, credible and compelling response to each? *e.g., 'too expensive,' 'not a priority,' 'we have something internal'*

Yes ◯ No ◯

2. YOUR MESSAGE

Q3. Can you describe your product's ROI in the terms your buyer uses in their own budget conversations? *e.g., 'reduces days in A/R by 12%', and not 'streamlines billing workflows'*

Yes ◯ No ◯

Q4. When discussing your solution, do prospects lean forward and ask questions? Or do they politely nod and say they'll circle back? *If it's mostly nodding, you're probably in trouble.*

Lean Forward ◯ Circle Back ◯

3. YOUR DISCOVERY

Q5. In your last five sales conversations, did you spend more time listening than talking? *If you talked more than they did, that's a NO.*

Yes ◯ No ◯

Q6. Do you know why your last lost deal was actually lost... from the buyer's perspective, not yours? *Not 'they went with a competitor.' What was the real reason?*

Yes ◯ No ◯

4. YOUR PIPELINE

Q7. Does every deal in your pipeline have a defined next step with a date and an owner? *e.g., 'CFO demo — May 3, Owner: Sarah'*

Yes ◯ No ◯

Q8. If you removed every deal that hasn't moved in 60 days, would your pipeline still look healthy?

Yes ◯ No ◯

5. YOUR PROCESS

Q9. Do you have a documented, repeatable sales process? Or does each call depend on how the conversation goes?

Documented ◯ We wing it ◯

Q10. Do your pilots have written success criteria agreed upon before they start, so both sides know what success looks like? *e.g., 'reduce no-show rate by 15% within 60 days'*

Yes ◯ No ◯

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6. IS IT 'MUST-HAVE?'

This is the section most founders skip. And the one that explains why good deals stall.

Q11. Is your solution positioned as a must-have? Or is it one of fifty valuable things your buyer could do? *Your buyer has more compelling options than capacity. In a market flooded with AI-driven solutions, 'worth doing' doesn't get you on the short list. Must-have does.*

Must-have ◯ Might-do ◯

Q12. Do you know the top three objections that buyer raises? And do you have a specific, credible and compelling response to each? *e.g., 'too expensive,' 'not a priority,' 'we have something internal'*

Yes ◯ No ◯

What Your Score Means

0–2 NOs	**Strong foundation.**	Fundamentals are in place and your frame is sharp. Refine your message, improve conversion, and scale what's working. A Sales Call Tune-Up is a great next step.
3–6 NOs	**Gaps worth addressing.**	Real holes that compound over time — longer cycles, more stalled deals, wrong rooms. A focused coaching engagement pays off fast.
7–12 NOs	**Time for a reset.**	Build the right foundation: ICP clarity, a real message, a transformational frame, a repeatable process. Fixable — but the market won't wait.

START HERE: Sales Call Tune-Up

Send a real call recording. I'll tell you exactly what's getting in the way — money-back guarantee. Coaching and sales advisory services also available.



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