

Territory Plan & Brag Book Workshop

Turn assumptions and achievements into an interview file you can defend.

03

ORIGINAL CASES / WORKED EXAMPLES / EDITABLE COMPANIONS

Independent career education. No employer affiliation.

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What you are building

A useful interview plan lets another person examine your decisions. It shows what you know, what you are assuming, what you would investigate and what needs to happen before a larger commitment. A brag book, or interview evidence file, does the same for your achievements: it gives the reader enough context to understand the claim.

This workshop joins those two tasks. You will build a conditional 30/60/90-day plan and a concise evidence file. The examples are original fictional teaching cases for U.S. career preparation. They are not employer instructions, actual account intelligence or a guarantee of the work you will be authorized to do.

Use your target role's current instructions. If a recruiter has not requested a plan, ask whether a brief preparation outline would be useful. Do not assume every stage or employer expects the same artifact. A plan should support the conversation rather than overwhelm it.

The editable companion files include blank and completed examples. Read a completed case first. Keep its structure only where it helps your own situation, and replace fictional facts before sharing anything as personal evidence. Do not include patient information, confidential customer records or proprietary material you lack permission to disclose.

FIELD NOTES / 01

01 / Separate facts from assumptions

Four kinds of statement

A fact is information you have a basis to rely on, such as a responsibility in the current posting. An assumption is a provisional condition you use to think through the exercise. A question identifies information you still need. A dependency is something that must happen before an action is appropriate.

Mixing these categories creates false confidence. “I will convert three hospitals by day 60” may sound specific, but it is empty if the candidate has no account information, training timeline, authority or basis for that number. A better plan can be less certain and more useful.

Worked correction

Fictional draft: “By day 30 I will be an expert on every product. By day 60 I will cover accounts independently. By day 90 I will exceed quota.”

Revision: “First I would confirm the employer's training and readiness requirements. During the initial phase I would build product knowledge using approved materials and observe assigned work where authorized. As readiness is demonstrated and reviewed, I would agree which responsibilities I can take on. Commercial priorities and measures would be set with the manager using actual territory information.”

The revision is not a complete plan yet. It needs outputs and questions. But it removes unsupported promises and creates a structure the interviewer can challenge intelligently.

A plan statement with substance

Write an action, its purpose, evidence of completion and its dependency. Example: “Map the roles involved in one account's workflow, so I understand whom to involve in different questions. Output: a manager-reviewed account map. Dependency: appropriate access to information and direction on what I may record.”

The output is observable. It is not a revenue forecast. If the interviewer explains a different process, the candidate can revise it without abandoning the entire plan.

Practice

Label each statement in your draft F, A, Q or D. If a sentence contains more than one category, separate it. A statement with no label is often too vague. “Develop relationships” needs an actual action and a reason before it belongs in the plan.

FIELD NOTES / 02

02 / Build the role-specific brief

The role changes the plan

An associate candidate may need to emphasize structured learning, dependable support and readiness review. An experienced seller may need to show how they investigate and prioritize a territory. A clinical-support candidate may need a different set of responsibilities entirely.

Stryker's public role overview distinguishes several sales-role categories; Boston Scientific's example clinical-specialist posting includes education and commercial support. These sources establish variation, not a universal ramp schedule. [S1-S2]

Before making a calendar, write the actual responsibilities, known conditions and questions. Avoid copying another candidate's plan and changing the company name. The resulting document may promise work that does not belong to your role.

Brief template

Section	Include
Role and context	Current title, posting date, location and principal responsibilities
Known expectations	What the posting or employer has actually stated
Relevant experience	Your evidence for the work, with honest scope
Learning requirements	Gaps to address through research or employer training
Constraints	Time, access, scheduling and resources that need clarification
Questions	Information that would materially change the plan

Worked brief: associate

Fictional Northline Devices describes an associate role supporting an established territory team. The candidate knows that learning and coordination matter. The candidate does not know the product-training sequence, the allocation of account responsibilities or the criteria for independent work.

The plan therefore begins with those questions. It can still be specific about the candidate's preparation: maintain a learning log, summarize approved information, ask for feedback and document agreed responsibilities. It should not assume that every task can be completed in a fixed number of days.

Worked brief: experienced seller

Another fictional role emphasizes account development. The candidate has B2B sales experience but no access to the actual territory's account data. The plan uses a small fictional dataset to demonstrate prioritization and explicitly labels it as an exercise. It explains which real inputs would be needed before using the method in practice.

The candidate can demonstrate commercial reasoning without pretending to possess confidential intelligence. The distinction should be visible on the document itself, not buried in a verbal disclaimer.

YOUR PRACTICE RECORD

One point to apply to my target role:

One claim or assumption to check before using it:
