

## OM Surgical Solutions is providing Sales and Marketing Services for Companies with Products in Spinal Deformity, Degenerative Spine Pathologies, Spinal Oncology and Neural Oncology



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**"We are important because we are trying to make a very complex subject easier to understand. We are trying to get information to who matters most, and that is the patient. We wanted to make it accessible. We wanted to make it in non-technical terms." - Shomit James**

**CEOCFO: Mr. James, what is the focus at OM Surgical Solutions, LLC today?**

**Mr. James:** Thanks for having me Lynn and thanks for asking. OM Surgical Solutions is an innovative medical device distributorship. We have a strong emphasis on spinal deformity, degenerative spine pathologies as well as spinal oncology and just entered into the neural oncology space. Essentially, OM partners with small to medium sized medical device companies either startups or well-funded companies and we essentially run their sales and marketing channels.

**CEOCFO: Why the focus in those particular areas? Was that a deliberate strategy or was it more opportunistic?**

**Mr. James:** As the founder and creator of OM I have a background in spine. I started with three of the largest spine companies out there; Medtronic, Globus and Stryker. If you want to rewind why I wanted to get into spine; it goes to watching my mom at a very young age suffering from a tremendous amount of back pain from the result of a traumatic spinal injury when she was young. I have watched her live with this debilitating back pain all her life. Therefore, when I was introduced to medical technology, mainly around the spine, I was so fascinated by the advancements and exactly how you can restore life in many of these patients, whether they are congenital spinal disorders or unfortunately, from a traumatic event, and how you can essentially alleviate pain and improve quality of life. Therefore, I am excited to play in a small part of this. However, it really does stem from watching my mom live with some pretty bad back pain.

**CEOCFO: Something good came out of it.**

**Mr. James:** Yes, absolutely!

**CEOCFO:** *For the companies that you bring into the fold, what are your criteria? How do you know when a company really has something, even though it may be patented or it may be approved?*

**Mr. James:** I like to start off with the team. The team basically has a makeup of industry vets that have been on some big projects as well as their direction. I then love to look at what is under the hood. What exactly does the technology entail? Where is their focus? I have my own surgeon advisements group that would also come in and vet over the product very intensely. These products have to have strong efficacy.

The company has to be well funded, because the last thing you want is company that will be here one day and gone the next, because these are implantable products. I would say from the team and the engineering as well as surgeon involvement; because surgeons are very key in driving the majority of the innovation around medical technology.

**CEOCFO:** *Is there a particular mix of products that you like or is it the more the merrier; if they are good they are good?*

**Mr. James:** I really moved into the spinal oncology space Lynn, more from a compassionate standpoint. Obviously, cancer affects everyone. It has affected me personally and in cancers such as breast and pancreatic and lung cancer, one of the first things that it does is metastasizes to the spine. Historically many of these patients would undergo large spinal procedures to remove all the affected areas, and the use of Titanium implants are surgically implanted which limits accuracy and dosage levels of post operative radiation therapy, but with with the advancements in the technology like Carbon Fiber Implants, we are seeing an extension of life.

We are giving these people a better quality of life as they spend their last years. That has been very rewarding! I work with some great surgeons that are pioneering this space, from the Mayo clinic in Scottsdale to Stanford; that has been revitalized for me, because you have seen these technologies actually impacting patients and giving them a fighting chance. That has been very rewarding!

**CEOCFO:** *What is new in spinal oncology?*

**Mr. James:** Thanks for asking. Carbon fiber pedicle screws. If you look at the evolution of pedicle screws, we moved from various materials like stainless steel, because of the rigidity of it. Then we looked at titanium. Those are the kinds of metals that we worked on. However, when a tumor is present, many times these patient, post-op, are getting radiation therapy. The surgeon will come in at the focal point of the tumor and resect as much of the tumor as they possibly can, which unfortunately makes the spine unstable, so you have to fixate it. When you fixate it, you put in the titanium instrumentation which is used now.

There are two companies that are spearheading the carbon fiber movement and they show great data internationally, and they are CarboFix and icotec. They have both just recently received FDA clearances. What we have noticed is that when you implant carbon fiber

pedicle screws it gives you the stability to brace the spine, because you have made it unstable, but more importantly now you can deliver radiation therapy more accurately to the tumor site. Many of your radiation oncologists are very happy, because now they can give their doses accurately and more precise, as opposed to when you have titanium present. This is a very, very exciting time in our space right now with Robotic Surgery, AI/Predictive Analytics, Virtual Reality, and of course material science.

**CEO CFO: *Are you concerned that something is good today may be found less so over time?***

**Mr. James:** What is great is that there is more accessible information and is a key reason why we acquired a new company DocsDial. We are trying to break down complex medical procedures and convey them in non-technical laymen's terms. To what you are saying, yes. It should be a concern for patients. They need to know what is going in their body. You have had documentaries like Netflix with "Bleeding Edge" that created some waves in our industry. Therefore, patients should do their due diligence to know what is going into their body. I will say, these kinds of documentaries or when you see those lawyer commercials on TV; they are honing in on some cases where there were failures. However, we do not really talk about the successes in the MedTech Space.

As a medical device professional it is frustrating, because there are so many great things out there! However, I do think that there is a responsibility of a patient and of their caregivers to look into whatever devices that is going into them and ask your physician and your surgeon. There is plenty of information on line.

**CEO CFO: *Would you tell us about the talent development side of OM Surgical?***

**Mr. James:** The talent development side was something that we are kind of playing around with. As we become more visible through social media channels we get a lot of young, inspiring medical device professionals that are very interested in getting into this industry. There was no real clear path. Now there has actually been the advent of a medical sales college and they have done a great job of training the next crop of medical sales professionals.

What we really stress to our young device professionals is that there is one thing that is imperative. That is "patient first." Just like a doctor takes the Hippocratic Oath, we believe that patients come first and that should be paramount. Many times your medical device professional will come into surgery and support their various devices. It is extremely important to remember, that could be a father, a mother, a brother, a sister, a family member, a friend; and to take your job very seriously! The talent development side of that is how we stress that. We have invited new reps into the operating rooms with our trained specialists. We have brought in new representatives into surgeon offices so the surgeons can explain exactly how they want their technical representative to be. Nothing is better than mentoring! It is a gratifying feeling that we all have at OM; to mentor someone as they progress through their career.

**CEOCFO: *What is your geographic reach today, both from where companies might be or who is buying your products?***

**Mr. James:** We are looking to be a nationwide company. We are about a year and one half old. We are currently playing in California and Arizona and parts of Nevada. As we scale we see taking over the Pacific North West, we see moving out more Midwest. We go where the market is, so areas like Texas and areas like Florida, where there is a huge aging population that are suffering from back pain; we start looking at those areas. It is a slow move, but we definitely want to be a nationwide company.

**CEOCFO: *What have you learned in the last year and a half? What has changed in your approach?***

**Mr. James:** What I have learned is that there are many innovative technologies out there. The great thing is, companies are innovating. More VC, more private equity are investing in startup companies with great concepts, with surgeons that have great concepts, to engineers that have great concepts. I came from some of the biggest players in the market and we had an agenda and we looked at whatever their technology was. Obviously, we had to know the competitive landscape, but what I see now is that I get to see a larger field. I get to see so much coming down the pipe, not only domestically, but internationally. Some of the most innovative technologies are being done overseas. I do have a group that I work with in India, in China and other parts of Southeast Asia. What is exciting is just is going to be coming, hopefully, to the US market. Again, the importance of making an impact on patients in a positive manner has been exciting for the last year and a half.

**CEOCFO: *Are you seeking funding, partnerships of investment as you move forward?***

**Mr. James:** No, we are organically driven. At some point we might look into it. I talked to my CFO about it, but we currently, we are all organically driven.

**CEOCFO: *What does the next year look like for OM Surgical?***

**Mr. James:** The next year looks like the team is growing quickly. With the acquisition of Docs Dial we are going to be moving more into a media focus. The division of device is holding strong, so that will continuously grow. However, we are moving into a media center and content creation and what you are going to see from OM is a new podcast that we will be launching. It is a podcast that will basically about industry, doctor facing, engineer facing and explaining in the latest trends and medical devices as well as what is currently out there. Hopefully it will be engaging for the medical community.

We have also acquired two niche media sites that are going to be patient facing. We forecast really building the content out, Q3 of 2020, Q4 and that is [www.spinedeformity.com](http://www.spinedeformity.com) and [www.spineoncology.com](http://www.spineoncology.com). They are going to be all patient facing where they can understand more about whether you have a spine deformity or whether you have a spinal tumor and where to get the right information and hopefully to get to the right place for your care. That is what we see for next year.

**CEO/CFO:** *How do you gain attention in that realm? There are many sites, lots of blogs, lots of patient interaction. How do you get the attention of the groups that have their favorite go-to now?*

**Mr. James:** Digital presence is very big. We are based in Silicon Valley. We have some of the biggest social media area platforms right in our backyard, like the Facebooks, the Googles the LinkedIns. We know we have to use these channels. We know these channels are very impactful. We know that they are actually quite inexpensive. Our CMO is a wiz on that. I brought him into this medical technology world.

He was a dotcom guy who exited on a company a couple of years ago and he is very in tuned on creating a digital presence. Social media is very big as well. However, the medical space is still very grass roots. Conferences are big. We travel all over the country to attend conferences.

**CEO/CFO:** *Why is OM Surgical Solutions an important company?*

**Mr. James:** We are important because we are trying to make a very complex subject easier to understand. We are trying to get information to who matters most, and that is the patient. We wanted to make it accessible. We wanted to make it in non-technical terms. We also want to essentially focus on companies that are doing the right things. The way we can do that is essentially building their brand and getting more visibility to them. However, I want to stress that the patient must be at the forefront. Everyone must think about the outcome. There is a lot of money being made in this industry and just do not want that to tarnish what is exactly the important thing. Therefore, "patient first," is the last thing that I will leave you with. That is very important to us.



**OM SURGICAL SOLUTIONS**