Using Strategy in an Office Call

By
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07-23

I recently had a conversation with a senior lab executive that told me he wanted his field reps to "….get back to building client relationships like the good ol' days before the Covid epidemic."

Proper sales training rises to the ladder's top rung when hiring and providing refresher courses for all marketing representatives. Unlike many professional jobs that requires significant time in academics, salespeople drop into a different category. I, myself, am a good example. I didn't attend college to major in sales. In fact, I had no prior formal selling instruction when I was first hired by a laboratory (I attribute being an Army medic striking enough to help me land the job). The company initially held a two-week training class and subsequently offered periodic continuing education (like pilots, physicians, lawyers, accountants, etc.). The intent was to ensure their field staff thoroughly understood the lab's sales culture and would employ a uniform and professional sales approach. My employer wanted a strong sales organization vs. leaving it up to their reps—in a proverbial sense—to fly by the seat of their pants.

Strategy

My 50-year experience in the lab industry has revealed many salespeople give the perception of strategy short shrift. It evolves into an instinctual process typically described in a single sentence, and managers may neglect discussing details with their reps. Not good. Top salespeople fill out (for each account) a strategy page with items such as employee names, position, and influence; competitor lab data (including strengths and weaknesses); length of client/lab relationship; the name of the coach (if any); any influential affiliations (hospital/corporate ownership, friend, school mate, etc.); where the client sits in the pipeline, etc. Over time, an authentic strategy will include many amendments due to the inexorable vagaries of market conditions, competition, the client/prospect itself, and the rep's lab.

Before moving forward, let's define strategy in a business setting. One might explain it as the determination of basic, long-term objectives for target accounts, and the adoption of actions and resources necessary for carrying out these aspirations. That's pretty good. But I prefer a more laconic definition: it's the art of creating power. That's all-inclusive and put in a nutshell. Even better.

Strategy: Office Personnel/Client Commitment Objective

Any strategy involving selling lab services requires an initial understanding of a typical doctor's office. While this may appear elementary, when I first started in the industry, my focus was myopic on one individual: the physician (supporting staff was irrelevant). Given more experience, I expanded my office perception and realized there are four basic roles people play: (1) decision-maker, (2) administration, (3) user, and (4) coach. It's the "user" group I impulsively interpreted as being solely the provider since he/she is the one that orders the test and reviews the report. But it also became evident I should include the office manager in this user set because this person deals with non-clinical lab facets and can be a heavy-duty influencer in lab selection (sometimes even embracing the role of decision-maker). But, dipping to a more granular level, I realized users also encompass (to varying degrees) the receptionist, medical assistants, billing person, and, if one exists, clinical coordinator. Any of these employees can be influential when expressing opinions about a laboratory. If the lab creates irritating problems for anyone or doesn't extend a service they know a competitor offers, it's possible these tangential users can manufacture a compelling case to bring in a different lab and ameliorate the situation (so much for irrelevancy) . Trust me on this point—I've watched it occur many times. As a doctor once told me, "If my *staff* is happy, *I'm* happy." But, having said this, let me offer some words of wisdom: *always* seek to speak to the lead physician early in the sales cycle. Don't be satisfied when your contact says, "Thanks for stopping by. Let me talk to the doctor about it." In this case, your response could be something like, "I appreciate that, but my boss made it clear he wants me to talk to Dr. ____ about this. Can you help me in this regard?" This type of response exploits two notable strategies: (1) it draws on emotion (a potent factor) and (2) it asks your contact to do something for you as opposed to (so frequently) the reverse. Sales training programs call this last point "gaining a client commitment"—a judicious and significant part of any sales strategy. Best practice calls for a rep to have a client commitment objective firmly in mind for each sales call. This could be getting an appointment with the next higher-level person, making a lunch appointment, setting a date for a lab tour, obtaining specific competitor information, and the *pièce de résistance*: getting the client to agree to try your lab.

Strategy: Client Lunches

Some doctors' offices ask vendors to bring lunch to talk about their products or services. It affords an opportunity to meet the provider(s), the support staff and to start crafting a strategy. Questions should be aimed primarily at the practice manager and physician, but receiving feedback from everyone present will provide meaningful data points. Once you understand the circumstances, it's important to ask questions that guide toward your lab's competencies and differences. I've observed client lunches where salespeople (especially in a first-time visit) are inherently eager to have an audience, and they thrust immediately into a description of their lab without securing any current lab state-of-affairs. Not good.

Something else I've noticed is failing to distribute business cards to everyone. This gesture is essential business etiquette (not to mention it's *the* most inexpensive form of marketing). Do this even if your brochure includes your card. You are creating a personal and friendly one-on-one experience by introducing yourself, asking their name and position, and providing your card. People will tend to remember you, which helps in future calls. As a side point, Japanese business protocol requires what can be described as a veritable ritual when presenting a business card. If you call on a physician with Japanese heritage, you should know about this formality. If done correctly, you will elevate your status and credibility before saying much of anything.

It may seem obvious and instinctive to distribute your lab's marketing information when employees arrive to eat their lunch. There are binary schools of thought on this subject. My suggestion is to wait until after your presentation (unless you need to refer to it during your talk). If the audience has your sales pamphlet, their attention could be concentrating on it vs. listening and responding to you (this scenario extends to a one-on-one sales call as well). Your luncheon is a costly proposition. You would like everyone's attention and not have it sabotaged by people scrutinizing your brochure. Make certain, of course, the provider(s) and the office manager leave with your business card and any written material.

Strategy: Using Names

There is an oft forgotten strategy (and tactic) of saying a person's first name (except, of course, the physician). When you interject your contact's name within a conversation, it helps to "warm" the dialogue, and it acknowledges a friendly and respectful feeling. Our name is the sweetest thing we hear. Think back to a recent conversation you had with a client or prospect. Did you mention their name? Depending on the length of the exchange, one time is probably sufficient (in addition to *always* including it in your salutation and valediction). Do not, however, overdo it within your discussion because it starts sounding false and insincere.

Strategy: Finding a Coach

I mentioned a "coach" as one of the four roles inside an office. This position exists as someone who can help guide you with important intra-office and competitive information. A true coach must hold three key attributes. (1) They want to see you win the business, (2) they are respected inside the account, and (3) they regard you as being credible. Due to this, it takes time to build a relationship and uncover an internal coach (frequently it's the office manager, but not always). There resides a strong chance you won't make the sale unless you have a coach that realistically encompasses all three elements.

Strategy: Basic Differences

We all make decisions based on disparities either through our own cognition or with somebody else's help (i.e., a salesperson). Here sits an obvious point but let me accentuate something: basic differences must signify something important to the client and/or their patients. I learned this lesson early in my career. The lab I worked for had a proprietary parathyroid test and report, and I was eager to talk to physicians about it. Unfortunately, my naivety emerged when I explained this basic difference to a rheumatologist. I anticipated a flattering response, but the doctor politely informed me he would probably never order a PTH test given that it didn't align with his specialty. Ooops. As impressive as the differentiator was, it didn't meet the basic difference definition.

Within the first few months of initiating my sales career, I ran into the following unexpected situation. After sitting in a prospect's waiting room for a bit, I (somewhat nervously) walked into the doctor's office, presented my business card, introduced myself, and sat across from his desk. Before I could say anything more, he surprised me by opening the conversation:

> "Let me explain something. I don't want to hear about your lab's superior quality, daily courier pick-up, next day reporting, the supplies you provide, and your lab's terrific client service department. I get

those things now, and I expect them from any lab I use. I agreed to see you today ‘cause I’m curious what your lab does differently from what I’ve described.”

The reader may want to pause for a moment to think about what professional-sounding response you might have uttered if you were in my shoes.

OK then. I’ll admit to my inelegant response:

“My lab offers all those services you mentioned, and we do it very well as evidenced by the many clients we have. Let’s just leave it like this—if you ever become dissatisfied with any aspect of your current lab, please keep my business card on top of the pile and call me.”

It was a very brief meeting. I left humiliated, knowing it would probably be a while before I could convert this office. In fact, this siege could take years before my competitor screwed up enough to cause a change in labs.

With experience under my belt, this describes how I *should* have responded:

“I’m glad you asked the question. For one thing, I’d be the best lab representative you’ll ever have. I’ll keep you informed of the latest testing and methodologies my lab introduces. I’ll give you and your practice manager my cell number so I can respond immediately to your questions or issues. For another point, I’ll stop by periodically to check on my lab’s service levels. And here’s something you should know about our mission: my lab aims to be a strategic and valued partner with our clients versus being considered just a routine transactional vendor. Part of the way we accomplish this is through developing a win-win relationship and creating effective communications between our clients and professional staff. If you become a client, I’ll make sure to introduce our medical director, allowing you to feel comfortable calling him if you have questions about our testing. As for other differences, I’ll have to first ask you some questions.”

Bam! No sheepish or awkward reply. A retort like this demonstrates 100% self-assurance and belief in my lab. As far as the questions to ask, this entails knowing your lab inside out vs. your competitors’ capabilities. Disparities range from in-house tests and panels, turnaround time, methods, reflex testing protocols, lab location, professional staff, patient service centers, courier pick up time, supplemental monthly statistics, supplies, lab portal competences, etc. Yes, it’s a bit operose to learn in-depth aspects of your lab as well as the competition. But master-class reps sustain a focus on continually enriching their “differentiator meter.” Knowing your lab’s competitive differences will aid in (a) developing your credibility, (b) providing a skillful question-and-answer conversation and (c) preventing marauding competitors from stealing your account. I remember well a situation when I averted losing a good customer because I was “locked down” on my lab’s capabilities, and I knew my competitor very well.

Here are some additional insights on this subject to keep in mind: You need to develop a value-driven strategy by turning your lab’s distinctions into *client benefits*—and stay out of commoditization. A commodity sale should only exist when you consciously choose it as a strategy. Commoditization encourages clients to ignore value—value only you can describe.

Strategy: What Offices Say They Want

I have had the benefit of asking hundreds of individuals over many years what they would like to see in a laboratory service above the obvious of testing and returning results. Most admitted those two aspects were the primary things they expected from a lab. But there were some people that gave my question more serious thought. Their responses distilled into three primary buckets.

Bucket #1: Keep me informed of new tests and methodologies; support me with clinical decision tools.
Bucket #2: Make things convenient for me, the staff, and patients to use your lab.
Bucket #3: Help control healthcare costs.

These segments drive customer interest and loyalty. It's important to uncover facets of your lab that you can put into each one (a meeting with your medical director and operations manager might be able to support you with ideas). A portion of your strategy should be to re-frame what a customer *ought* to consider when selecting a lab (far above the expected and vanilla-sounding things like specimen pick-up, quality results, phlebotomy centers, and rapid turnaround time). When you mention these three buckets, it offers two primary advantages: (1) it helps differentiate you and your lab and (2) it will raise their interest (generating curiosity in sales is good; people are eager to hear more). Most individuals regard labs as a commodity service and don't inherently think of these three areas as part of a lab's overall functions. As an FYI, some laboratory executive thought leaders refer to this as changing from simple Lab 1.0 to a more value-driven Lab 2.0. After mentioning your three "buckets," the conversation naturally shifts to a detailed explanation of how your lab coalesces with each point—and to show examples. Visual aids keep the eyes busy and the brain active. If you fail to stimulate the eyes, you fail to stimulate the brain—and their attention. Not good.

I need to address an important point about Bucket #1. Any education material you distribute can relate to a test or method, but it doesn't always have to (that's good; it shows you're not self-serving). It should, however, be pertinent to their specialty. Examples are a clinical abstract, announcement from the CDC, USPSTF, FDA, or medical society. This didactic approach can be especially helpful as a valid reason when introducing yourself to anyone in a doctor's office. It's a good pathway to "break the ice." We humans are biased to appreciate it when someone gives us something. Once you give your material, it makes for an easy and casual conversational flow to continue with, "By the way, I was wondering……." Providing relevant info gives you license to garner intelligence via questions about the current lab (or whatever). Think of it as quid pro quo.

Strategy: e-Mail

One additional way to cultivate credibility involves e-mailing a relevant information piece. The following are some key details to consider about this strategy:

1. It creates "soft" visibility (vs. a personal visit)—and keeps your name in front of him/her.
2. It supports an efficient use of time by contacting many people within a short timeframe.
3. You should send your e-mail to *one* individual (i.e., not a broadcast). A sample note might say, "This article from ____ publication came across my desk today, and I thought you might be interested in reading it." That's it. No sales pitch. No lengthy verbiage.

4. This type of correspondence speaks to the fact you regard this person as important. Feeling valued is man's strongest non-biological hunger (and you can carve that in stone).
5. Your e-mail and attachment "grease the skids" when you make a personal visit. People may be more apt to see you since you have previously sent informative material.
6. Do not use this strategy only one time; but don't overdo it either. Once a month (or every other month) might be sufficient.
7. As for attachments, be cognizant of the person's job. For providers, it obviously means something they can apply in a clinical sense (abstracts, testing disease algorithm germane to their specialty, medical society recommendations, etc.). For the support staff (in addition to doctors), it might include more general healthcare information (CDC, USPSTF, FDA, etc.). Once you become friendly with someone, and you know their outside interests, attach an article relating to a subject the person enjoys.

Summary

Using strategy in sales—that is, creating power—sits equally aside employing effective tactical measures. Besides the office manager and lead provider, there exists other staff that can provide important background comments, explain current lab likes/dislikes, and potentially become a strong advocate for your lab. The rep must distill these comments and ask questions that flow toward his/her lab's capabilities and differences. Explaining the benefits of your lab's attributes—and staying away from commoditization—endures as a central theme. Using e-mail with an educational attachment keeps your name visible, allows you to become more time efficient, and helps enhance your credibility.

When properly employed, the approaches mentioned in this paper help foster relationships—the foundation of sales. Targeted strategies steer the sale forward in incremental steps and establish your integrity as opposed to appearing like the Energizer Bunny. This translates to visiting prospects where conversations keep going….and going…..and going….with no successful conclusion in sight. "How are things going with your lab?" is a typical and insipid sales refrain. Let's flip that to, "I've got an interesting article on ……., and I'd like to talk about it with the doctor and/or the office manager. Is either one available for a brief minute?"

The message is crystal clear. You may not have needed much of a diverse strategy when Covid emerged. But you surely need it now. Create more sales power. Benefit yourself and your lab by exercising proven lab industry strategies.

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