



If Socrates Sold Lab Services

Part 1

By Peter T. Francis

Socrates, the Greek philosopher, lived from 469 BC to 399 BC. At around 2,400 years ago, he became a master at something withstanding the test of time: asking questions as a means of persuasion. Huh? Socrates could persuade extremely effectively, and he was a teacher of sorts—not a salesperson. With this great facility of persuasion, we need to consider what it would have been like for Socrates if he had sold laboratory testing services.

Before getting into the specifics, let's look at what may typically happen within a client/rep interaction—especially a first-time visit by an inexperienced sales representative whose name is John Phillips. He's calling on Dr. Johnson's office, an internist. John approaches the young lady sitting behind the front window.

John: “Hi, my name is John Phillips from Acme Laboratory, and I'd like to speak with your office manager about our testing services. We have a new cardiac testing profile that would benefit your patients. What is your office manager's name?”

Front Desk Person: “Her name is Betty Cozen. I'll check to see if she has a minute. *(leaves and returns)*. “She said you can go back to her office. It's the second door on the left.”

John steps into Betty's office and hands over his business card with a brief introduction, and Betty says: “I don't have much time—I'm in the middle of a project.”

John: “Oh, OK. I'll be brief. As my card states, I am with Acme Laboratory. Here, let me show you our capabilities marketing piece *(hands it to Betty, and she starts scanning it)*. As you can see, we are a full-service clinical lab, offering high quality results and next day turnaround time. Our Client Services Department has an excellent reputation, and the technical staff is always available in case the doctor has questions. We have a courier that picks up your specimens, and we offer EMR integration for results. We also

give the necessary specimen supplies, and bill insurances. One of the things that separates us from our competition is a special profile aimed at evaluating patient wellness in cardiac disease and risk assessment. Let me show you our literature on this (*hands Betty another sheet*). I was hoping this office would like to give my lab a trial run to see how it compares with your current lab service. Out of curiosity, what lab does this office use?"

Betty: "We use ABC Lab as our primary lab, and we've been doing business with them for a few years. Their service has been fine, and we don't have any complaints. We're not looking to change labs right now. I agreed to see you today because I wanted to be informed of your lab in case we run into problems. I'll keep your business card and information on file. Thanks for stopping by. I'll call you if we have problems."

John: "I see. Well.... OK then. Thanks for seeing me today. I'll see you later."

If Socrates were sitting in on this sales call, he would be jumping out of skin with frustration. Let's see what might happen if Socrates made this sales call from Acme Lab.

Socrates to Front Desk Person: (*Handing out his business card*). "Hi, my name is Socrates from Acme Laboratory. I hope you can help me. What's your first name?"

Front Desk Person: "Mary."

Socrates: "Mary, I have some updated information on advanced cardiac testing that's not available from other laboratories. I'd like to speak with your office manager about this important information." What's his or her name?"

Mary: "Her name is Betty Cozen. I'll ask her if she has a minute." (*Leaves with his business card and returns*) "She said you can go back to her office. It's the second door on the left."

Socrates steps into Betty's office and hands her his business card with a brief introduction, and Betty says: "I don't have much time—I'm in the middle of a project."

Socrates: "I understand, and I'll be brief, Betty. I'll say up front that I'm not selling anything today. My card indicates I'm with Acme Lab but, because this is our first meeting, I only want to ask questions to get some background on your office and the labs you use."

Betty: "That sounds fine. What do you want to know?"

Socrates: "First off, who is your primary lab?"

Betty: "We use ABC Lab as our primary resource."

Socrates: Do you use any other labs for special reasons?

Betty: “Yes. We also use DEF Labs because of a sole source insurance contract situation.”

Socrates: “Do you draw blood in the office or send patients to a patient service center?”

Betty: “We give them the option. Most people prefer the convenience of getting blood drawn here. Also, we like doing it because it helps with compliance. You’d be amazed at the number of patients that forget to get their labs drawn.”

Socrates: “I certainly understand—it’s a nice service to offer your patients. Is there anything ABC Lab obliges you to use them such as hospital ownership or friendship with a pathologist at the lab?”

Betty: “No, we have no ties to anyone or institution.”

Socrates: “Tell me, Betty, how long have you been using ABC as your primary lab?”

Betty: “I guess it’s been about 5 years.”

Socrates: “What sold you and the doctor on using them in the first place?”

Betty: “We were having specimen pick-up issues from the previous lab. The sales rep from ABC stopped in at just the right time because we were upset. That was the day we had to ask patients to come back and have their blood re-drawn. It was time-consuming, embarrassing, and inconvenient for our patients *and* my staff.”

Socrates: “I see what you mean. So, should I assume things have been satisfactory since you changed to ABC? Or have there been any problems along the way?”

Betty: “The service has been going OK, but, like anyone else, we’ve had our little issues every now and then. But the lab fixes them, and we get back on track.”

Socrates: “Can you tell me about these little issues?”

Betty: “Well..... it’s been things like sometimes duplicate reports don’t get transmitted to the specialist when we’ve stated it on the requisition. And sometimes waiting on hold for Client Services. Maybe there’s a billing problem every now and then... you know, those little itch-it things.

Socrates: “You mentioned waiting on hold. How does that affect your staff’s productivity?”

Betty: “Well... it can bog them down. Like anyone, we’re impatient. We have a busy practice, and I want my staff doing their regular jobs. Having to wait on the phone is irritating.”

Socrates: “How else does waiting on hold impact on your staff’s productivity?”

Betty: “Sometimes if it’s a medical assistant on hold, and the doctor needs her, it’s frustrating. One time, our MA had to ask our receptionist to pick up the line—and that caused *her* to be held up.”

Socrates: “It sounds obvious you’d find it more productive for your staff if they didn’t have to wait on hold for extended periods. Right?”

Betty: “Yes, of course! But I’m sure no lab can promise that kind of service. I mean, who doesn’t have to wait on hold? It’s just the way businesses operate these days.”

Socrates: “You’re right, Betty. It would be hard to guarantee no wait times. But let’s keep this thought for a second, because there’s another thing I want to ask you related to this subject. When you call your lab, do they have a recorded auto-attendant answer the phone requesting you to push certain buttons for various departments like Billing, Client Services and so forth?” (*Socrates already knew the answer, but he wanted Betty to tell him*).

Betty: “Sure do. But we’ve come to accept it. Very few companies have someone that picks up the phone. *That* would be novel. I don’t think we work with any vendor that doesn’t have a recorded answering message.”

Socrates: “I know what you mean. My lab, however, takes personalized service very seriously.”

Betty: “Oh? You mean your lab has a receptionist answering the phone?”

Socrates: “Yes, we do. Personalized service is very important within our culture. We take great pride in it because most of our competitors don’t offer it. But let’s return to the other issue you mentioned about waiting on hold. I have something here you might find interesting. Acme Lab monitors the in-coming hold-time statistics each day. At the end of each month we calculate the median. Our lab prints a report that shows a hold-time daily average for the month. Let me show you a copy of last month’s statistics (*hands her a typed sheet*). As you can see from the daily statistics, our monthly average was 7.7 seconds for hold times. Depending on the time of day, our clients connect through immediately. When you consider our personalized service and minimal phone wait times, do you see those as improvements over the service you receive from ABC Lab?”

Betty: “Yes, it looks good. But I’m not ready to go through the hassle of changing labs just because of wait times or someone answering the phone.”

Socrates: “I understand, Betty. But just keep these operational and strategic benefits in mind, because we offer other unique aspects as opposed to ABC Lab. I’d like to build what I’ll refer to as a “benefit bucket” so, during any subsequent discussions, I can make deposits. For example, part of my responsibility is being an educational conduit to keep our clients abreast on general healthcare and lab-related topics. It could be a new test, a more sensitive methodology, an update on clinical practice guidelines, an important study from the CDC, a disease algorithm..... things like that. As an example, I want to give you this brochure from our lab that describes a unique cardiac profile not available from other labs (*hands over the marketing piece*). It contains esoteric cardiac tests that help Dr. Johnson evaluate the patient’s complete heart profile and future cardiac risk. Will you pass this on to him?”

Betty: “Yes I will. I imagine Dr. Johnson might find this interesting.”

Socrates: “Thanks. My personal philosophy is not to bother clients with needless visits. I like to stop in when I can provide something that you, your employees and/or Dr. Johnson may find helpful. May I stop back another time when I have something else?”

Betty: “Sure, Socrates. I’ll admit I’ve always felt labs are all basically the same. But you’ve explained some discrepancies and provided an interesting cardiology piece. I feel a little more educated.”

Socrates: “I hear similar comments from other people. I can assure you there are several other disparities we have that you and the doctor might find interesting and beneficial. But, as I initially said, I’m not here to sell you today. I wanted to gain some background information and explain a few things about Acme Lab. I’d to build that important element of trust—which means understanding your situation before I start spouting all kinds of features that don’t have any relevance to your practice. Thank you for seeing me. I’ll stop in again sometime to talk about ways in which my lab can benefit you, your patients, and Dr. Johnson.”

Betty: “Nice to meet you, Socrates. Thanks for stopping in.”

Commentary: John’s Interaction

John’s initial introduction to the front desk person—while not horrible—could have added a couple of things that would have made his intro a little more effective. He should have asked her name, then used it. Adding “I hope you can help me” is a brief statement that creates an emotional component; most people’s natural reaction is to want to help other people when asked, and it “softens” the interaction. John did well by giving a legitimate reason why he was there and asking for the name of the office manager.

As is a common reaction from a client, Betty said she didn’t have much time for this meeting. She was being polite to see John—but there was no sincere interest in

changing labs. John, however, interpreted her comment at face value, and he thought he should do a “data dump” in one fell swoop—so off he went. He immediately handed his lab’s capabilities brochure and began to blabber without taking a pause. This is a very unsophisticated sales approach for a couple of reasons: (1) he didn’t ask any pertinent questions about their current lab and (2) Betty divided her attention between what John was saying and the content of the brochure. A good sales rep *always* wants the client’s undivided attention.

In addition to this disjointed focus, John didn’t think about what he was really doing in this situation: immediately pushing Betty to think of the *future* (i.e., using his lab). But it’s the *past* that Betty knows, and she is—like most prospects that are satisfied with their lab—not ready, nor willing, to think about the future. John interacted with Betty only twice. He presented his lab’s services without uncovering any background data about the office practice. He had no idea what was important to Betty (or Dr. Johnson), so he might as well have been a circus barker, blurting out features to anyone who will listen. Betty was bored by John’s blabbering approach, so her reaction was to shut him down and get him out of the office. Finally, notice John tried to close the business by suggesting a trial run of his lab, but he committed another cardinal sales sin: he didn’t wait for a response. He quickly followed it with a question.

After the call, John felt somewhat satisfied with Betty’s answer of keeping his literature on file. He reported back to his sales manager: “I had a nice exchange with the office manager, Betty, at Dr. Johnson’s. While the office appears to be happy with ABC Lab, Betty said she’d keep my brochure and thanked me for stopping by. This is a good sign, and I think I’ve got a good strategy with this client by dropping in on occasion. I hope they eventually have problems with ABC, because it will put us in a good position to get our foot in the door.”

Hmm-m-m-m. Sounds like John doesn’t know that the words “strategy” and “hope” should not exist in the same frame of reference. He will eventually learn an important sales slogan: hope is not a strategy.

Commentary: Socrates’ Interaction

Socrates’ first interaction with the front desk person included the statement, “I hope you can help me,” and he asked her name. He subsequently used it when giving his valid reason (people love to hear their name).

Out of eighteen times he spoke to Betty, there were fifteen questions. Was Betty eager to get rid of Socrates? It didn’t appear so. His queries were focused on *her* situation. He began the visit by stating a clear objective: he was not there to sell anything—only the seeker of information. This was music to Betty’s ears. Socrates knew it would help lower the invisible defensive sales shield that always exist in first encounters with a sales rep.

Unlike John's approach, Socrates uncovered there are two labs used at this office. He qualified the practice by asking if there were any ties to another organization such as a hospital. This is a key point because it immediately helped Socrates understand the political situation. He knows that when politics and emotion are at play, most everything else becomes secondary.

We all know that, as with many sales encounters in the laboratory business, people typically state that everything's fine—there's no need to evaluate alternative labs. However, Socrates took what appeared to be a "little issue" and got Betty to build it up into a larger-than-initially-thought situation. He didn't immediately blurt out his lab's capabilities as John did. Instead, he asked about the *consequences* of phone hold times, which, in turn, forced Betty to re-think the problem. In addition to the operational benefit of minimal hold times, Socrates also brought up a strategic benefit: personalized service when answering the phone. In the end, he asked her a solution-based question to gain her buy-in of the two benefits as an improvement over the current situation. He knew that whenever he could get some form of agreement, it was a baby step forward in the sales process.

An important relationship edge Socrates understood was to occasionally interject Betty's name in the conversation. It's like a verbal touch to the arm. He said her name sparingly—only four times. He didn't want to use it constantly because it would sound false and insincere. An interesting note is Betty mentioned Socrates' name once. While it may seem insignificant, this should be recognized as positive. It indicates he impressed her and there was respect. [For the reader, think back how many times when someone mentioned your name during a meeting—especially the first time. My guess is there was not many instances].

Socrates talked about a "benefit bucket"—a good metaphor that indicates more attributes will be included. He made sure the dialogue flowed naturally. Socrates emphasized he wanted to build a credible business relationship—something many inexperienced marketing people fail to express when visiting a prospect for the first time. Customers find it professional and refreshing when vendors create an atmosphere of wanting to get to know them and provide helpful information as opposed to what John did by demonstrating an amateurish approach of talk, talk.....and talk some more.

Finally, Socrates asked permission if he could make future visits when he had something of value to discuss. Nascent marketing people often forget to say this, because they simply assume the prospect will be delighted to see them again. Getting a prospect's agreement to see a sales rep another time stands as a distinct psychological advantage that creates an accretive effect on a relationship. It's called an "action commitment" in sales parlance.

Summary

Long before this sales call, Socrates came to the realization that being inquisitive offers many advantages. He understood that asking questions demonstrates his interest in the client, and it creates a balanced discussion. Another principal point: questions uncover hot buttons that can be expanded by asking about consequences. This helps to enhance the problem in the person's head. And, most importantly, he recognized questions *persuade* better than any other form of verbal behavior. The reason is that people value more what *they* say and their *own* conclusions more than what they are told by someone else.

The American poet, E. E. Cummings, laconically said, "*Always the beautiful answer who asks a more beautiful question.*" Had Socrates and Mr. Cummings lived in the same period, Socrates would have held him in the highest regard and would have probably carved that axiom in stone. Questioning techniques remain as important today—and even more so in sales—as it did 2,400 years ago.

Let's move on to Part 2 of this series.

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