



## *If Socrates Sold Lab Services*

### *Part 3*

By Peter T. Francis

In the first episode, we observed an inept sales representative, John, make a sales presentation to Dr. Johnson's office manager about his me-too lab service. She was unimpressed with his lab's offerings, because it sounded like what they were currently getting from their ABC Lab.

Socrates from Acme Lab later entered the picture, and Betty, being courteous, was willing to talk to him. He used a much different approach from John—more professional and inquisitive. For example, when it came to uncovering issues with their lab, Socrates used consequence questioning skills, and this allowed Betty to realize the full magnitude of extended phone wait times. He also described his lab's geographic benefit and got Betty to think of the turnaround advantage for a Pro-Time test. Socrates metaphorically described placing these differences into a "benefit bucket."

In this third part, Betty had scheduled an appointment for Socrates to meet briefly with Dr. Johnson. This stands as a good move for three reasons: (1) he could speak directly with the provider about clinical benefits of his lab, (2) it demonstrates Betty felt it was important enough to have Dr. Johnson involved and, very importantly, (3) it shows a form of *action* on Betty's part. Socrates knew that getting the customer to do something for him (versus typically the reverse) demonstrates a subtle willingness to move the sale forward.

Socrates' commitment objective for this up-coming meeting is for the doctor to agree to try Acme Lab.

We pick up at the initial part of the meeting with Dr. Johnson:

**Socrates:** “Nice to meet you, Dr. Johnson. Betty and I have had a couple of discussions about your ABC Lab service. I’m certainly prepared to talk about my lab, but if you can give me your perspective on what you expect from a lab, we can focus part of this brief chat on your needs and interests.”

**Dr. Johnson:** “Well.... *that’s* a first! I don’t see reps very often, but if I do, they usually do the talking—and rarely ask me what I think about certain things. Well, let’s see here .... ABC Lab. I guess it’s about four or five years I’ve been using them as my primary lab. They’ve been reliable. The courier comes by a couple of times a day to pick up my patient’s specimens, and the lab returns the routine results through an EMR interface usually the next morning. They give me lab supplies and do the billing. I would say, in general, things are going smoothly from my point of view.”

**Socrates:** “I’m glad to hear their service is working well. I wanted to recap one of the things I explained to Betty in our first meeting: We take customer service very seriously. We work hard at minimizing wait times on the phone because we understand its effect on our clients. I showed her an example of last month’s wait-time average—7.7 seconds. As an addition to our customer service focus, we have a live person answering our phone as opposed to ABC Lab that has a recorded auto-attendant that asks the caller to push buttons for various departments. Our clients tell us they appreciate our personalized service. What’s your opinion on that?”

**Dr. Johnson:** “That *is* rare these days. I see your point. What else makes your lab different from ABC?”

**Socrates:** “We have many differences, but I don’t want to reel them off, because some may not be relevant for your practice. I need to find out what *you* feel is important from a patient care point-of-view. For example, you said you get results the following day. Would you find it beneficial if you could get morning Pro-Time results the same afternoon?”

**Dr. Johnson:** “Well, yes, of course. Does your lab provide same-day results? Is there an extra STAT charge?”

**Socrates:** “No, we don’t charge any extra for this service. You may already know that Acme Lab has its facility here in town, and this contrasts with ABC Lab that is about two hours away. This can be a big discrepancy when it comes to processing your patients’ samples. Our courier can collect your specimens in the early afternoon and deliver them to the lab. Because we set up testing immediately, we post results for routine assays before the end of business hours. ABC Lab, on the other hand, receives your specimens in the evening, and by the time the lab begins its testing, it’s well into the night and early morning hours. With Acme Lab, we transmit your morning routine results—including Pro-Times—before the end of business the same day. This gives our clients an opportunity to adjust their patients’ dosage, and it circumvents potential

clinical problems. Do you agree this is a positive step towards more efficient patient care?”

**Dr. Johnson:** “Yes. I would say so.”

**Socrates:** “And one more thing, Dr. Johnson: you would have a competitive advantage over the other area doctors who use ABC Lab. Do you have any thoughts on that?”

**Dr. Johnson:** “Hmm-m-m-m. I see your point. It’s always good to have a competitive advantage. I didn’t give it a second thought that a lab could offer any kind of leverage for me. You’ve made a good point. So....is there anything else besides personalized phone service and fast turnaround time that differentiates your lab?”

**Socrates:** “Let me ask you: how does your rep keep you informed of changes in his lab, such as new tests, methodology, or clinical practice guidelines?”

**Dr. Johnson:** “As Betty probably told you, I usually don’t see representatives due to my heavy schedule. I don’t even recall our lab rep’s name. I ask Betty to talk to him when he stops in. And, frankly, I’m not even sure how often that is.”

**Socrates:** “This may, in fact, be another significant basic difference between the two laboratories. Do you feel it’s important to be kept informed?”

**Dr. Johnson:** “Well... sure. But things don’t change that often with the lab. I mean, I’ve been using the same basic lab tests for years, and I only order them when I feel it’s clinically relevant or when I do an annual physical.”

**Socrates:** “That’s a responsible approach to practicing medicine. My point is this: lab medicine, in fact, *does* change more often than you might think. Not only could it be the introduction of a new test, but also a new methodology that offers greater sensitivity and/or specificity. Additionally, the various medical associations—especially the USPSTF—occasionally update their recommendations. For example, there’s a new algorithm for respiratory virus testing from the Association of Diagnostics and Laboratory Medicine. And, the National Institute for Allergy and Infectious Diseases has recently developed guidelines on testing food allergies. The point I’m making is I can be a resource for you to keep you updated with changes—not only with lab medicine, but also with clinical practice guidelines. How do you think this may impact your practice?”

**Dr. Johnson:** “Yes, I see this can be helpful. You make another good point. Do you have copies of this respiratory algorithm and food allergy guidelines?”

**Socrates:** “I have them in my office, and I’ll be happy to give it to you when I stop back in a few days.”

**Dr. Johnson:** “Good. I’d appreciate that.”

**Socrates:** “There are other examples I can briefly share that can help you with patient care (*he knows the phrase, “help with patient care” will prick the doctor’s ear*). I mentioned before about changes in methodology. Let me ask you, have you noticed in recent years that ABC Lab has reported more than usual positive *C. difficile* results?

**Dr. Johnson:** “It’s interesting you bring this topic up. Yes, I have. In fact, I called the lab some time ago about this, and I was told they changed to a modern PCR method that has much greater sensitivity than the previous one. This is one test where greater sensitivity, by itself, is not helpful. I seemed to be getting more false positives. I felt testing for *C. diff* was sometimes a waste of time and money.

**Socrates:** “Just to add more to my basic difference list, let me explain what my lab has done in this respect. We had been performing *C. difficile* testing for many years using the standard EIA methodology that evaluates the presence for Toxins A and B. However, we changed to the algorithmic guidelines endorsed by the American College of Gastroenterology, the Infection Diseases Society of America, and the American Society of Microbiology. Acme Lab first uses a quantitative PCR test for *C. diff*. If the result is negative, that’s all the testing we do because it has a high negative predictive value. But if the result is positive, we reflex to a Toxin A & B test, which is highly specific for *C. diff*. Do you see how this new *C. difficile* algorithm testing can benefit you and your patients?

**Dr. Johnson:** “Yes, I understand what you’re saying, and it sounds like a good approach. I’d like to read some published papers on this subject. Can you also get me this in addition to the others we talked about?”

**Socrates:** “Certainly. But I’d like to point out this is yet another example that indicates how I can be a valuable support to your practice. Most people regard a lab as just a transactional vendor—simply running tests and returning results to the provider. But Acme Lab provides more than a routine service. We aim to give our clients *value*— and that’s what I promote as evidenced by this discussion.

**Dr. Johnson:** “Hmm-m-m. Yes. You’ve given me something to think about.”

**Socrates:** “So, that covers several things separating our lab from ABC Lab—attributes demonstrating clinical, strategic, as well as operational benefits. Before we go further, are there any questions you have for me?”

**Dr. Johnson:** Yes. You mentioned having an earlier pick up. Should I assume your courier would come later in the day to collect additional specimens?

**Socrates:** Oh, yes—of course. Our courier times are relatively flexible to meet your requirements. We would stop by twice a day.

**Dr. Johnson:** “Good. I think that’s it for now. I’ve got to get back to seeing my patients. I appreciate you getting that information for me. Let’s talk later.”

**Socrates:** “I’ll get going, but, before I leave, I want to briefly summarize three quick benefits I’ve discussed with you:

1. We offer a very personalized service, not only through our lab, but also through me as your personal representative—someone that keeps you informed.
2. We minimize phone wait times for your staff, allowing them to be more productive at their job.
3. Due to our local presence, Acme Lab can process your patient’s specimens during the day, allowing for better turnaround time. This can also be impressive for your patients—and it helps distinguish your practice from other doctors in the area using ABC Lab. This can give you a competitive advantage.

I’d like to propose this: the next most logical step is for your office to give Acme Lab a try. There’s no commitment—just *try* us for a few patients to see how we do. If it looks like there’s a good fit, we can expand the relationship over time.”

**Dr. Johnson:** “Sounds like a plan. I’ll tell Betty to work out the details with you to give your lab a trial run. We’ll see where it goes from there.”

After Socrates left the office, Dr. Johnson commented to Betty, “You know, that’s the first time I can remember where I *thought* I was satisfied, but that Socrates guy got me thinking otherwise. He asked some good questions. He talked my language.”

### **Commentary**

Like all good sales representatives, Socrates performed a mini critique of how things went after he left the office. His commitment objective was to get the doctor to try Acme Lab. Mission accomplished. Socrates wanted to hear from the doctor his personal impressions of ABC Lab, and the doctor thought that direction of the conversation was refreshing. On the other side, Socrates was a little disappointed he asked several “closed” questions where the doctor could have replied with a Yes or No answer. He knew that using more “open” questions would have been better to allow the doctor to expand his thoughts. Overall, however, Socrates thought the meeting went well.

Socrates interacted with the doctor 15 times—and 11 of them involved a question. Notice, too, that Dr. Johnson asked Socrates 5 questions, which imparted a sense of interest.

Take note of Dr. Johnson's perfunctory—yet common—attitude toward his lab: "They're reliable." For those who sell lab services, people hear words of satisfaction most of the time. However—a *big* however—people don't use a checklist about points with their lab. They may forget a particular need or take something for granted. Therefore, Socrates asked questions corresponding to *strategic strengths* of his lab. He targeted unrecognized problems and provided solutions. In essence, he brought to light a little whirlpool under the placid water, helping Dr. Johnson think about specific subtleties of his lab and practice. Socrates understood he needed to create more than just rational reasons for using his lab. He wanted to bring *emotion* into the picture. Thus, he discussed (1) the lab's locale (with associated benefits)—a rational component, (2) improving patient care—a rational *and* an emotional aspect, and (3) a competitive advantage over other area doctors—a creative notion that highlighted another emotional element.

One interesting point: Dr. Johnson didn't know his lab representative's name. This didn't escape Socrates, and it indicated no strong personal ties had formed with the current lab rep.

One could argue the point that Socrates should have had available third-party proof of testing for respiratory testing, allergy, and *C. difficile* infection. On the other side of the coin, one could also say that returning another time with a valid reason ("the doctor wanted me to show him this...") would bring greater effectiveness by being visible, building credibility, and showing responsibility. It would help to not only differentiate Socrates, but also provide another moment with the doctor. This scenario contrasts with other lab reps who stop in on a casual basis with nothing important to say and usurp people's time away from their job..

Let's evaluate the close. Socrates proceeded through three important steps: (1) he asked if there were any additional questions, (2) he summarized the important points and (3) he suggested the next step. Note he did not *ask* for the business—he *suggested* the idea of a trial run. Socrates knew that proposing/suggesting has a more professional forward movement, versus coming across in an aggressive, pushy sales style. It distills down to the age-old maxim: People love to buy, but they *hate* to be sold.

### **Final Words**

Over 2,400 years ago, Socrates developed a method of persuasion one could classify as "low-pressure selling"—specifically, asking questions. Through inquiry, he led people

to their own judgment, because he knew individuals value more what they say and value their own conclusions.

In the health care world in which most people are happy with their lab service, Socrates knew he had to guide prospects to unveil things they hadn't given much thought to. Did he work for a mega lab that offered a wide range of services? No. However, he thoroughly understood the differences of his laboratory over the competition. He recognized if he was going to be successful, he could not wait for ABC Lab to falter. That could take years, if at all. No—he “worked” the differences to a win-win outcome by asking questions. Socrates' motto became, “Questions Are the Answer.”

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