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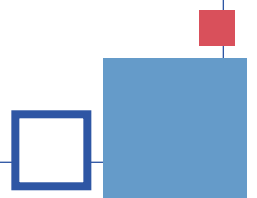
Employing Psychology When Selling a Lab Service

By
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In my first job after college, I began selling lab services to physicians. My sales manager explained that selling involves both art and science. The “art” portion includes thoroughly understanding your lab’s offerings, identifying customer needs, and demonstrating how your lab outperforms competitors. That’s Sales 101. On the other hand, the “science” part relates to psychology, and unfortunately, not every sales rep fully uses this crucial aspect. Sales psychology merges an understanding of human behavior with communication techniques and emotional triggers to influence customer decisions.

The Basics

Generally, healthcare professionals and patients see clinical labs as commodities. The lab receives the specimen, performs the tests, reports the results, and invoices for the service. Doctors and practice managers often think this simple process is all there is. Despite this view, field reps keep visiting offices and clinics, never knowing when they'll meet someone facing lab problems. However, research shows that about 95% of prospects in any sales territory say either they don't have serious lab issues or they're instructed by the outside owner (e.g., hospital) to use a specific lab. Geez... that's a lot of rejection. It gets worse when you're told the office manager and doctor are busy, so you can't even get a chance to talk to an influential person. Frustrated, you hand your lab's marketing brochure to the receptionist and ask for it to be passed along to the doctor. Then you leave. Or is there something else missing from your visit that could have made it more effective?



Building Trust and Credibility

Let's assume you represent a typical clinical lab. If it's your first visit—or if you haven't been there in a while—you have three main objectives when talking to the receptionist: (1) confirm which laboratories they partner with, (2) ask if they regularly draw blood on-site, and (3) explain your legitimate reason for being there—something the office manager or doctor *would find relevant* (e.g., you're not there to sell; you want to pass along helpful information). Examples might include a newly introduced test or profile, an upgrade to a testing methodology, a new PSC location, a revision on contracted insurance carriers, or a relevant clinical abstract/testing algorithm. Usually, four scenarios occur: (1) you get to speak with either the manager or a provider; (2) if you have printed materials, you are told, "Just leave it with me, and I'll make sure he/she sees it." If so, write a brief, personal note on top of a single piece of literature, sign it, and attach your business card; (3) you are instructed to email the office manager to set an appointment; or (4) vendors set up a luncheon meeting. While this last one is common, the deep-pocketed pharmaceutical industry established this practice many years ago. When it comes to decisions about using a lab, the only two people you initially want to meet with to see if there is a good fit are the lead physician and the practice administrator—either together or one-on-one. You would be happy to provide a sandwich or a salad in exchange for a discussion. However, as a first-time introduction, buying lunch for the entire office is overkill—and some might call it extortion. And while on the subject: don't waste time trying to do a sales job on the receptionist. He/she is typically not in a position to make a firm decision about switching to a different lab.

Let's consider a first-time visit with a prospect, where you meet Mary, the office manager. Your first two objectives are: (1) establish your credibility, and (2) collect office background information.

A Sample First-Time Introduction

You: "Hi, Mary, I'm _____. it's nice to meet you." (as you present your business card)

Mary: "It's nice to meet you. Have a seat."

You: I assume you have a lot on your plate, so I'll keep this brief. I hope you can help me. As my card indicates, I represent ABC Lab, located in _____. My boss asked me to visit your office and update you and the doctor on _____ (the same valid reason you gave to the receptionist). But before I get into that, I'd appreciate it if you could help me understand your lab situation by answering a few questions.



It is important to recognize the logic and psychology behind your statements in this brief introduction.

- You mention Mary's name. This is significant because our name is the most pleasing sound we hear. Saying it helps create a personal bond.
- You hand her your business card. This is the proper way to conduct business. Not doing so puts you in an embarrassing position if she's forced to ask for it.
- You show empathy by acknowledging, "I assume you have a lot on your plate." Demonstrating empathy is a fundamental part of sales.
- Saying you'll be brief sounds like a symphonic chord to Mary's ears. It's another empathetic remark that shows you respect her time.
- You ask for help. Asking someone for assistance generally prompts a positive response from most people. It's in our nature to want to help others when asked.
- You state that your boss asked you to visit the office with some information—you're following orders. People understand this and give you leeway. It also creates the impression that this office has been singled out, showing they're important.
- You explain that, before discussing the material relevant to the office or patients, you need to ask a few questions about their lab situation. Mary thinks to herself: *That's reasonable. Sure, I don't mind answering some questions.*

Pay attention to the final comment. What you're doing is using a psychological tactic called a *quid pro quo*: "I'll give you something relevant, but you first have to answer some questions." Anyone would find that acceptable. You haven't made any suggestion of, "I'm here to sell you on trying my wonderful lab," which can be a turn-off. People love to buy, but they hate to be sold. Your less-than-60-second introduction has started to build your credibility.

The Questions

Research reveals that sales success depends on how the sales representative manages the investigation phase of the call. To fully understand the client's lab situation and develop a robust strategy, it's essential to receive answers to at least 15 different questions, though not all during the initial meeting.



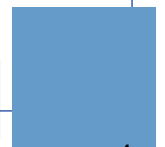
Top performers use a pre-printed questionnaire to record Yes/No responses and make notes, including the date, office name, and contact person. After asking 7 or 8 questions, they shift back to the initially provided legitimate reason. The remaining unanswered queries serve as a reason to revisit in the future.

It may seem redundant, but successful marketers verify information provided by the front desk. A word of caution: avoid explaining the receptionist shared any details with you.

The following is a suggestion for questions during a first-time visit with an office manager:

1. Do you routinely draw blood in the office, or do you refer patients to a PSC?
 - If the latter, do you designate a lab, or do you let patients choose their own?
2. What lab is integrated into your EMR? Alternatively, “What laboratory do you use for Medicare patients with specimens collected in the office?”
 - Either response will likely signal their lab preference.
3. What other labs do you use?
4. Are you and the provider(s) generally happy with _____’s services?
5. What is a typical number of patients this office sees in a day?
 - With this statistic, you can gain a sense—*specialty-dependent*—of the general test volume. For GP/IM, divide the daily patient load in half.
6. (In states allowing client bill) Does the office bill the patient for lab tests?
7. What do you *like* about your primary lab?
 - Ideally, you want to eventually get opinions from others in the office besides the office manager (providers, the clinical coordinator, or staff who handle lab specimens).
 - Asking initially about “likes” has a psychologically optimistic connotation—people enjoy giving positive feedback.
8. I hear from other offices like yours that they face issues with their lab. What are some of the problems you encounter?

Let’s assess the main points of questions 7 and 8. It’s a natural progression to shift from the yin to the yang. Saying, “I hear from other offices like yours,” uses the Herd Mentality Theory (or Social Proof). This appeals to a basic behavioral instinct: if others are doing or saying it, we probably should too. When someone explains what appears to be a minor problem, untrained sales reps often respond quickly with a solution their lab can fix. However, we’re not talking about a small sale, like selling a pen or a magazine subscription, where a simple two-step approach might work. Clearly, choosing a lab is a major decision—it’s not enough to offer solutions immediately. This is where Implication Questions play a more nuanced and sophisticated role.



After the customer mentions an issue that occurs randomly, and it's one your lab can easily address, you say, "What effect does that have on _____" (e.g., office productivity, healthcare costs, the doctor's reputation, the office reputation, the patient, etc.). An Implication Question (or even better, two or three) explores a problem and encourages your contact to think more deeply about its effects or consequences (either personally or for the office).

After their response to your Implication Question(s), you then explain how your lab can tackle the problem(s). Using Implication Questions—within the right context—is a powerful psychological tool that even successful marketers often overlook.

An Example of a Presentation to a Prospect That's Using a National Lab

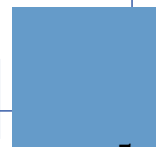
"Allow me to explain who we are and who we are not" (people like hearing both sides). We are a small lab that performs routine testing with next-day results. If we cannot do a test in-house, we send it to a trusted lab partner. We are not a large, national mega-lab like Quest, LabCorp, or Sonic Healthcare. These labs process thousands of samples daily, and their size and volume often lead to issues that cause frustrating headaches for customers and patients. Also, unlike these large labs, we are not a public company. As public companies, their main goal is to boost stock value, satisfy shareholders, and attract new investors. But we have no motive to inflate a stock price. Our main goal is to satisfy you and your patients. We are a local business that handles our clients' specimens with a personal, high-touch, customer-focused approach.

As I see it, your practice and our lab are in the same boat: small businesses delivering exceptional healthcare, one patient at a time, on a scale much smaller than that of national organizations. That's why discerning clients who value our culture choose to work with us. In addition to being a private, customer-focused business, we are a *value-driven* company that offers several unique advantages."

- Placing their office and your lab in the same space fosters a positive psychological feeling. There is a sense of unity.
- You include the phrase "value-driven" because, ultimately, *that's* what you are selling and what prospects are buying: *value*.

Your Presentation: Preparing the Soil, Planting the Seed

This approach functions as both a strategy and a tactic. It demands that the representative understands the details that distinguish his/her lab from competitors.



You start with “preparing the soil,” which sets the context. Then, you “plant the seed” by showing how your lab addresses that issue and the benefit it offers to the client or patient. Essentially, you're paving the way to your advantage—not leading with it. This follows a strong A-to-B structure and contrasts with reps who jump into their differentiators, sounding robotic: “We do this, and we do that, and we also offer...and another difference is...”

Here are some examples. While these may not apply to every lab, they are actual cases discussed in previous training sessions. It is essential for the lab to ensure that every field representative receives comprehensive training by reviewing *all* lab operations: courier, processing, PSC/phlebotomy, billing, methodologies, pathology, supplies, reporting, client-specific reports, and lab connectivity. During each department’s training, there should be an emphasis on any competitive advantages when applicable.

(Preparing the soil) “I’ve heard complaints from other offices that their patients are frustrated with both Quest and LabCorp because they expect patients to schedule a blood-draw appointment. Patients don’t like taking that extra step. They just want to drop in when they’re nearby, get their blood drawn quickly, and be on their way.

(Planting the seed) My lab understands this. We’re not a large lab, so we don’t need to follow strict appointment schedules. Patients can walk in, be seen right away, and move on. We offer a convenient approach that fits your *patients’* schedules.”

(Preparing the soil) “Most people I talk to like to support local businesses. Do you agree?”

(Planting the seed) We perform our testing just up the street. Think of us as almost an extension of your office.”

(Preparing the soil) “It is very common for labs to have an automated answering system for incoming calls. This requires callers to press a button to reach a department and then frequently wait on hold.

(Planting the seed) My lab offers something our clients appreciate: a live person answering the phone and handling the question or issue. No buttons to push, no waiting on hold. This demonstrates our commitment to personalization and top-tier service.”

(Preparing the soil) “The revenue Quest takes in supports the state of New Jersey because its headquarters are located there. Sending samples to LabCorp funds their North Carolina headquarters. Australia is the home of Sonic’s headquarters.

(Planting the seed) In contrast, our headquarters are located locally. Customers who use my lab support the local economy and help us create jobs for our community.”



(Preparing the soil) “With large commercial labs, when clients face problems, the field rep or customer service typically handles the issue. Unfortunately, senior management rarely becomes aware of these problems, so no one at the top can create lasting solutions.

(Planting the seed) This is not the case with ABC lab. Because of our smaller size, our Chief Operating Officer *and* Lab Director personally review each client complaint and ensure the issue is addressed internally. In our lab, improvement measures are overseen at the highest management level.”

(Preparing the soil) “Most labs use an immunoassay method for HgbA1c testing because it enables quick specimen processing and uses inexpensive reagents. However, this method cannot detect if a patient has a hemoglobin mutation. Unfortunately, this condition can affect the accuracy of HgbA1c results.

(Planting the seed) This is where our lab excels. We use ion-exchange HPLC for HgbA1c testing. The technician can view the mutational fractions on the equipment monitor and notes this interference in the report. This informs the clinician that the result may be affected by a hemoglobinopathy. In turn, the doctor can order a different test that is not impacted by an abnormal hemoglobin. The point is, when clients choose ABC Lab, they know they’re partnering with a quality provider.”

(Preparing the soil) Labs generate their routine testing reports for next-day delivery.

(Planting the seed) Our courier system offers local clients and our PSCs twice-daily pick-ups. They return to the lab after the first run in the early afternoon. Routine blood specimens are analyzed immediately, and we upload test results to the lab portal before the end of the workday. This is another example of how we add value by enabling providers to act swiftly if there are any serious, abnormal results. We elevate turnaround time to a whole new level.

A Note on Closing

Sales reps often *ask* for the business, but successful marketers take a more professional and psychological approach: they *suggest* the next step. This naturally leads to a successful conclusion of the call. Asking for a commitment can trigger resistance, but proposing an action helps keep the sale moving smoothly. For example, “I think the most logical next step would be for you to try our lab (or send some patients to our PSC).”

Conclusion

Psychology is essential to successful sales, from initial contact onward. It includes using techniques that build trust, clarify messaging, and align value propositions with customers’ needs.



To implement the ideas in this paper, laboratories should ensure their field staff are well-trained in each department's functions, especially where there are competitive advantages. This industry knowledge provides a foundation for a professional approach and helps avoid sounding like a me-too pick-up-and-delivery service. Additionally, field representatives should practice one-on-one with a colleague before venturing into the field. Practice and repetition are essential. Reading this paper once likely won't lead to full adoption or long-term improvement.

*Peter Francis is president of **Clinical Laboratory Sales Training, LLC**, a unique training and development company dedicated to helping laboratories increase their revenues and reputation through prepared, professional, and productive representatives. He is the author of over forty-five articles about laboratory sales. Visit the company's website at www.clinlabsales.com for a complete listing of services.*

