

# Occupational Health Management<sup>TM</sup>

*A monthly advisory for hospital-based occupational health programs*

---

## GUEST COLUMN



### Role-playing lets you try before you buy

By Georgia Greanias Casciato  
Vice President of Sales and Marketing  
National Health and Business Strategies  
Oak Brook, IL

*(Editor's note: In last month's Occupational Health Management, Casciato provided advice on how occupational health programs can create an effective sales staff. This month, Casciato elaborates on the use of role-playing, a technique that can aid in hiring the best sales professionals.)*

Hiring an occupational health salesperson can be a lot like buying a new car. In both cases, the purchaser wants to get the best value for the investment and make sure that the benefits are worth the price. Other than soliciting information from the seller and references who may not be impartial, it is difficult to determine how the salesperson, or the car, will perform every day in the field.

When buying a car, the solution might be a test drive. When hiring a salesperson, the solution often is role-playing with the applicant. Role-playing can provide important insights and another dimension for evaluation when included as part of the hiring process for an occupational health program.

While worthwhile, role-playing can be somewhat time-consuming, so you won't want to role-play with every candidate applying for a sales job with your occupational health program. First, weed out the questionable candidates, and reserve role-playing for your final pool of applicants.

Use a traditional resume credentialing process to qualify applicants for further review. Perusal of the resumes should rule out applicants who are not appropriate.

When assessing resumes, look for these factors:

- appropriate education and experience;
- successful track record in the sale of intangible

services such as occupational health, preferably with experience in calling on employers;

- acceptable presentation of the resume and cover letter;
- stable employment record;
- desired skills.

To ensure that role-playing efforts are spent on applicants who understand what the job entails and match the salary requirements, it is a good idea to screen applicants by telephone. This process allows the interviewer the opportunity to qualify or eliminate an applicant in minutes. Additionally, this interaction should provide the applicant enough information about your program and the position to eliminate themselves early in the interview process.

### ***Allows applicant to show abilities***

Recreating real-life selling environments allows the interviewer to evaluate the consistency of how the applicant *says* he or she would handle a certain situation and how the person *actually* responds in a simulated interaction with a prospective client.

To make it an accurate test of the applicant's skill, the number one rule of role-playing is that it must represent an area of sales comfort for the applicant. No applicant could be expected to convincingly sell your particular occupational health program, even though applicants can and should familiarize themselves with your program before the interview. To ensure that the candidate is dealing with a product that he or she should be fully familiar with, the role-playing may need to deal with services that the applicant sold in a previous or current position. That way, you can be sure that the skills demonstrated in the role-playing show the applicant at his or her best — no excuses about not knowing details of your occupational health program.

If the applicant doesn't seem familiar enough with the services of a current employer, that's a major red flag. Once hired, he or she isn't likely to be any more familiar with your own offerings than with the current employer's.

The goal of the role-playing exercise is to assess sales ability and to identify desirable skills that are transferable to your sales program. Also, you may identify knowledge of occupational health and employers' needs that will be useful in your program.

Role-playing can be conducted by professional recruiters, sales consultants, or designated



# Occupational Health Management<sup>TM</sup>

*A monthly advisory for hospital-based occupational health programs*

personnel from your health care institution. Although occupational health program managers may not be comfortable with role-playing, the valuable information it yields makes it a worthwhile addition to the hiring process.

The most likely time to conduct the role-playing scenario is in the face-to-face interview of applicants who have passed initial screening steps. It is also appropriate to use role-playing in a telephone interview and in a team interview, particularly for applicants who make it to the final stages of your selection process. Remember that the role-playing should simulate real-world situations as much as possible, so final candidates should undergo role-playing by phone if much of their work in your program would be done by phone. Similarly, they should role-play with groups of "customers" if they would be likely to make their sales pitch to more than person at a time.

## ***You're the customer***

To conduct role-playing, you or your representative should play the role of a customer or prospect while the applicants play themselves trying to sell you services. With role-playing by telephone, try to make the situation as realistic as possible. Rather than having the person simulate making a phone call, have the applicant go to another office and actually call you. You can even have the applicant call you from home or his or her current office.

With the telephone role-playing, the applicant's goal is to set an appointment with you for further discussion and to establish rapport with a stranger. Watch to see how well the applicant overcomes the lack of face-to-face interaction.

In all types of role-playing, use these suggestions to help you make the most of the experience:

- Act as a busy executive who is reluctant to make an appointment with the sales professional. Don't make an appointment unless you are convinced that it is worth your time.
- Don't be a pushover. Make them work for your attention and an appointment.
- Throw out roadblocks, objections, and stalls. Try lines like "Just send me a brochure," "I don't like your product," "I really don't have time for this," and "We're happily working with one of your competitors."
- Be polite and firm, but don't volunteer information that is not requested.
- Use vague responses to questions. That will help you determine how good the applicant is at asking the right questions to move the sales

process along.

- Throw in distractions to see if the applicant can stay focused. You can try questions that are pointless and distracting, such as "Didn't I see your name in the paper the other day?"

When evaluating the applicant's performance in your role-playing exercise, try to apply the same standards that you would apply on the job. Look for results, not just someone who can be friendly with strangers.

Be sure to ask the applicant for feedback on the interaction. Ask what went well and what didn't go so well. The applicant's response might help you improve your role-playing. Also, if the applicant did not do as well in the role-playing as you hoped, he or she might recover a few points by at least recognizing where the effort fell short.

Consider these questions when evaluating the role-playing:

- Did I grant the interview to the salesperson? Why or why not? (This assumes that you played your role as the customer well. If you feel you went overboard with being a difficult sales call, don't hold it against the applicant.)
- Is the salesperson someone you would want to spend an hour-long appointment with? Why or why not?
- Did the salesperson establish rapport with the customer or prospect?
- Was the salesperson credible?
- Did the applicant put you at ease?
- Was the salesperson more of an active listener than just a presenter?
- Did the applicant get you talking?
- Did you believe the salesperson truly understood your needs and your decision-making process?
- Did the person summarize what was discussed and get your agreement on needs and solutions?
- Before ending the conversation, did the person clearly outline a next step that you committed to?
- Did you enjoy the interaction with this person?
- Is this someone you would recommend to your boss?

In a group role-playing exercise in which the salesperson is making the pitch to a group of customers or prospects, there are additional concerns. Ask yourself these questions:

- Did the salesperson personally address each group member, learn and use their names?
- Did the person understand each person's role and their contribution to the organization?
- Did the salesperson provide an appropriate

# Occupational Health Management<sup>TM</sup>

*A monthly advisory for  
hospital-based occupational  
health programs*

---

level of information but still create a highly interactive discussion?

- Did the applicant identify the group's decision-making process and authority of the group?

In summary, there is no perfect approach to hiring a salesperson for an occupational health program, but role-playing can ensure that you have taken all possible steps to hire the employee who will do as well on the job every day as he or she performed in the interview. ■