

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

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

## Reader Question

### Sales meetings go awry when prospects argue

*How to get back on track*

**Question:** We occasionally are asked to present our occupational health program to a company's board of directors or commission. Often, considerable groundwork has been done with one or more board members prior to being invited to present to the entire group. Of course, we try to deal with the "decision maker" when doing this preliminary work.

On two recent occasions, however, the presentation meeting has disintegrated into various factions of the board fighting and filibustering in power plays. We are then ignored or become pawns in a game of one client group against another. The supposed "decision maker" sometimes has little power to control the meeting.

How can we best handle, or avoid, this situation?

**Answer:** That problem requires good advance work to minimize the chance of the meeting falling apart, and then a good dose of diplomacy if it does.

As you note, it is crucial to ensure that you are working with a true decision maker, says Georgia Greanias Casciato, a sales consultant with William M. Mercer, a health care consulting firm in Chicago. To do that, always aim for the highest possible manager or executive when first establishing a relationship with the company.

If in doubt, err on the side of being too high in the corporate structure, Casciato advises. It is much easier to be referred down to the proper contact than to be referred up. Also, the person you are referred down to is most likely to be the right decision maker.

Remember that the company's occupational health or safety professional might not be the right decision maker to work with, even if that is the person who eventually would be your main

contact. Once you have made contact with the apparent decision maker, Casciato advises meeting with that person at least once before presenting to the larger group. Explain that you need to make sure you will be presenting the information the group desires.

### Questions to ask

To confirm that you are dealing with the right decision maker, Casciato suggests asking these questions under the rubric of "I want to understand how your company works":

- If our facilities were to have an ongoing relationship, who would authorize that?
- Who is the person who would really make the choice between different occupational health programs? If the prospect says a committee would make the final recommendation, ask who the members would make a recommendation to.
- What would happen after I make a presentation to your group?
- If I were to present an agreement to your company, would you be the one to sign it? That question is perhaps the most definitive. The prospect has to answer yes or no.

Despite good preparation, meetings sometimes still fall apart. If this happens because you were not prepared or did not adequately address the company's concerns, those are issues you must address. But what about when your audience gets sidetracked by internal issues or simply starts bickering?

In that situation, you must try to redirect the meeting. Casciato warns that you must be polite, but not meek. Don't assume that because you are a guest in their house you must politely sit there and watch them waste your time. Remember that your time is as valuable as theirs.

Be direct, but not offensive. Don't belittle their comments or criticize them for interrupting. Even if you are legitimately upset, don't let that show. A bit of humor may help, but be careful not to offend. If people are arguing, try to find a point of agreement and build on that.

Casciato emphasizes that you should not consider the meeting a lost cause just because it gets off track. It is entirely possible for you to regain control and make the sale. She also points out, however, that there are times when you should just end the meeting. If, for instance, the audience is distracted by a major business development or a trauma such as the death of a co-worker, it is unlikely they will pay attention to



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

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

---

you. You can score a few points by showing concern and being considerate enough to reschedule.

She also advises paying attention to the "personal" needs of attendees. If a significant member of the audience arrives late, looks haggard, and mentions that he or she missed lunch, you might suggest moving the meeting to a nearby restaurant. That will ingratiate you a bit with the audience and help keep their attention, even if the setting is more casual.

## ***Take a tactful approach***

If you do encounter a meeting out of control, don't let it go too far astray before interrupting. The exact manner in which you interrupt depends a lot on what is going on in the meeting. Casciato advises trying one or a combination of these tactics:

- Acknowledge the distraction and reiterate the original focus of the meeting.

"It seems there are a lot of important issues that touch on what I was brought here to address. I'm sure you will want to discuss those later, but I want to make sure I have time to address the issues you invited me to discuss."

- Take a tactful approach to make them feel ashamed for wasting your time.

"We had this agenda to cover today, but it seems your focus has shifted to something completely different. Perhaps it would be better if we rescheduled my visit for another time."

That message must be delivered with a smile, not with any sign of anger. Either response to your suggestion is acceptable. You will either return to the original purpose, or you can leave and not waste any more of your time.

- Question whether this group is the appropriate audience.

"Everyone here seems to have so much to contribute that I'm afraid we're not going to have time to cover the issues I was invited to address. Would it be better if I met with a subgroup of this committee so we can focus only on these issues?"

*[Editor's note: If you need help with an occupational health issue, send your question to Kathy Cline, Managing Editor, Occupational Health Management, P.O. Box 740056, Atlanta, GA 30374. Telephone: (404) 262-7436. Fax: (404) 262-7837. Electronic mail: kathy\_cline@medec.com.] ■*