

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

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

## Reader Question

### Confirm client needs to close sales meeting

**Question.** Even when a sales presentation with a potential client has gone well, I'm never sure how to end the meeting. Are there certain topics I should be sure I've addressed before wrapping up the meeting? Should I ask for the client's business or just leave it open for more discussion later?

**Answer.** The last few moments of your meeting with a potential client can be the most important, says **Georgia Casciato**, a health care business consultant in Downers Grove, IL. In those last moments of the conversation, it is very important that you take the steps to make sure you have served the employer well in that meeting and to take the steps necessary for the next meeting.

It is not possible to rely on a set of points you should cover before ending the meeting because the content of your presentation should be very closely tailored to the particular needs of that client.

While you may want to be sure you mention certain highlights of your program to all clients, most of your presentation should consist of finding out what the employer needs from an occupational health program and showing how your program can help. So whatever the client's needs are, you should be sure you have addressed those before closing.

Even though the actual content will vary substantially from one sales presentation to the next, Casciato says these are some good general rules to follow in closing the meeting:

**□ Summarize what you have learned about the client's needs.**

This step serves more than one purpose. For you, it helps you confirm that you have understood what the client said. For the client, it tells him or her that you were listening and that you understand that person's particular concerns.

You can do this in a direct way, by saying something such as, "Before I leave, let me make

sure I understand the points you said were most important to you." Then list the points and ask, "Did I miss anything? Are those still the most important or are there other issues?"

Use this information as a question, leaving plenty of time for the client to jump in and offer more of an explanation or change his or her mind about something discussed earlier.

### ***Don't stall or waste time***

But on the other hand, be sensitive to the other person's time constraints and don't give the impression that you are bringing up those points again just so you can repeat a sales pitch about your program. If you've already taken up enough of the person's time, it would be detrimental to seem like you're stretching for more time. Just ask if you have the correct set of concerns, and if the person says yes, leave it at that.

**□ Provide brochures and other materials at this point, not earlier.**

If you use any brochures or other collateral materials in your presentation, this is the time to use them. Don't provide them too early in the meeting because the person will be distracted — especially if the materials are very good and interesting. You don't want to have the person reading and skimming through the materials while only half listening to what you're saying.

When you provide the brochure or other material, try to focus the client on the parts that are of most concern. "I'd like to leave this material with you. It summarizes some of the key benefits of the program, including those you said were most important to you," you might say. "This section describes the hours of operation and our time frame for follow-up communication after visits."

**□ Look for opportunities to assist the client who feels challenged.**

Your discussion with the client should have given you some idea of the person's background, how he or she came to be in this position, and how much the person is challenged by what you are discussing.

A great many contact people at work sites do not have an occupational medicine background, even if they are medical professionals, so they can be challenged by the details of the services you are discussing.

"It is very common for medical professionals to talk down to prospects when they participate



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in a sales presentation," Casciato says. "The prospects find themselves just trying to cover for the fact that they don't know what you're talking about. You don't get anywhere with that."

Instead, you should try to pick up on anything that the person might need a little assistance with. That could be an opportunity to offer some value to the prospect, rather than just acting as a salesperson. Providing something of value will greatly improve your chances of working further with the employer.

For instance, your discussions with the prospect may have revealed to you that the person is not very familiar with the requirements for physical examinations, what options are available, and what is required by federal regulations.

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Without pointing out that the person doesn't seem to be up to speed on this topic, you might offer a meeting with your program's medical director to go over physical exams. If the prospect accepts, you have extended your relationship and the person will appreciate the help.

"The last thing they want is to look stupid in front of their employers or other health care professionals," Casciato explains. "If you can help them out a bit, they'll remember that."

### □ Offer a tour of your facility or anything else they're interested in.

This is the perfect moment to offer a tour of your facility, a more in-depth discussion over lunch to address one of the client's particular concerns. Perhaps the client would like to meet the medical director, or contact other clients to hear how happy they are with your services. Whatever you have identified as the client's concern, there should be something to offer in terms of further contact.

"Your ability to close the sale depends on your ability to stay connected to that person," Casciato

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### Editorial Questions

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says. "Ideally, you want to leave that meeting knowing that you're going to see that person again because you've already made plans, or at least tentative plans. You have to stay in contact with that person, certainly more than your competition does."

**❑ Do not leave without knowing the next step.**

Even if the client does not accept your offer for a facility tour, or whatever else you suggested, you must establish what the next step is. Every encounter with the prospect should be designed to lead to something else. Make sure you know what that something else is before you walk out the door.

Ask the prospect directly: "What is our next step at this point?" Get some concrete idea of what will happen next. It is common for the prospect to reply that he or she needs to speak with someone else or think over everything you have discussed. That is fine, but you should gently press for some idea of when you will speak again.

Ask when you might hear back from the prospect, and establish what is to happen next: "OK. You're saying that you need about a week to think this over. If I don't hear from you in two weeks, I'll give you a call. Would that be all right?"

Marketing professionals sometimes avoid that direct approach because they fear that the prospect will say there is no interest and no need for further contact. But that's not the end of the world. You should ask why.

"If you get a 'No,' at least you know where you stand with this employer," Casciato says. "And you want the objection to come up while you're standing there to deal with it. It will be a lot more difficult to address on the phone."

Casciato says the next best thing to hearing "Yes" from a prospect is hearing "No." If it appears the refusal is firm and not just an opportunity to address the employer's concerns, that frees you up to concentrate on other prospects.

After several minutes of lukewarm responses from a prospect, it may be a good idea to just ask rather bluntly whether there is any need to continue discussions. The prospect may have been unwilling to say so until you ask directly.

"If you get a positive response from three people and a negative response from seven, a lot of marketers make the mistake of concentrating all their time on the seven negatives," Casciato says. "Don't give up too early, but don't waste time that could be spent better elsewhere." ■