

## Opportunities to Lead Occur Every Day

### Sales: Building Long-term Relationships

By Georgia Casciato

A salesperson for an occupational health facility has just closed a significant piece of business with one of the city's largest employers. The sales cycle included the employer's review of competing facilities, meetings with the medical staff, an on-site tour, client reference checks, and extensive consultations with the employer's risk manager and company nurse.

The employer has agreed to direct work-related injuries, physical examinations and required screenings to the provider in exchange for negotiated rates for specific services. While the agreement represents a sales coup for the facility, the client has a reputation for being particularly demanding, yet lacking in its sense of loyalty to vendors.

When attempting to attract a major client, there is a tendency on the part of providers to promise the moon (and discount prices) without understanding the possible ramifications. For example, offering special rates to a "cash cow" can cause problems with other clients. Therefore, all special rates must make sense either as a stand-alone purchase, in combination with other services, or based on volume. It is usually unwise to set a precedent of wholesaling your product because it devalues your service in the long run.

The challenge for the provider and its sales team is to develop an effective strategy that will build a mutually beneficial relationship and prevent a revenue dream from becoming an operations nightmare. Certain elements of this process can be adapted to provide strong customer service for clients of all sizes. However, clients should be qualified as to their prospective revenue potential before considerable new-business development time is invested with satisfied customers who pose limited additional-revenue opportunities.



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#### Planning Sessions

Typically, the major client-provider relationship building process begins with an internal planning session with key program personnel, including the administrator or program manager, medical director and sales representative. Issues to be discussed include specifics of the provider-employer agreement, the company's background, key players, reporting relationships, personalities, hot buttons, perceived expectations and insights from direct company interaction. The outcome of this meeting should be a work plan agenda that serves as an outline for formal planning sessions.

A request for a formal planning session demonstrates the provider's willingness to be proactive and responsive to meeting the needs of the client and helps elevate the role of the provider to that of a consultant.

The program director, sales representative and client company personnel who will interact with the clinic(s) should be present at the planning meeting. Agenda items to be addressed include agreed upon and prospective services, company policies/philosophy, billing/reporting expectations, and personnel contacts.

Additionally, a planning session should provide a framework to assist the salesperson in developing a plan to continually up-sell services and find other relevant ways to stay in front of the client. Examples of additional company needs include ergonomic assessments, health risk appraisals, back safety programs, carpal tunnel screenings, employee assistance programs and safety campaigns.

Following the planning session, the salesperson should document in writing all the delivery specifications and responsibilities of both parties. Ideally, a subsequent meeting between the salesperson and the primary company contact should be set to review and secure agreement on this work plan. At a minimum, a phone conference should be set for this purpose. Additionally, the occupational health program manager should use the work plan as a communication

tool with clinical operations staff.

#### Standing Appointments

Depending on the needs of the client, regular standing appointments with weekly, bi-weekly or monthly frequency may be helpful. Each appointment should be followed by the salesperson's written correspondence outlining actions to be taken and the responsibilities of each party, thereby creating accountability for both parties and setting up safeguards for the provider.

The salesperson needs to remain in close contact with the program manager to stay abreast of the client's activities and pro-actively communicate with the employer. The salesperson should work to develop a direct relationship with the employer and make it a point to keep dialogue open. When problems do occur, a timely response is essential and prompt follow-up by the salesperson is necessary to keep the company apprised of corrective actions.

At a minimum, contact with a large customer should be on a monthly basis once a maintenance mode is established. Opportunities for ongoing follow-up and customer service interaction include:

- phone call after the first visit;
- mailing of timely articles known to be of interest to the client;
- introduction of other health care professionals as determined by interest of client;
- in-person satisfaction survey;
- assisting the employer in developing a proactive "we care" program.

The salesperson should constantly seek opportunities to keep the client closely aligned with their facility. Other suggestions include 1) requesting their participation on an employer advisory group; 2) soliciting a company representative as a guest speaker at an educational seminar for other clients and prospects; 3) using the client as a referral source for other companies who may have similar needs; 4) seeking recommendations on



# VISIONS

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membership in area business groups;  
5) securing a high-level company  
delegate (CEO, CFO, COO on your  
hospital's board.)

In closing, it is important for the  
sales representative to approach a  
relationship with a large client the  
same way they would approach any  
long-term relationship: treat the other  
party the way you would want to be  
treated, mean what you say, say what  
you mean and deliver what you  
promise. Be prepared to give more of

yourself than what you plan to receive in  
return. Be committed to working  
through your problems, and win the  
company's respect by respecting yourself.

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