



Perfecting the Clinic Visit as a Closing Technique

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Inviting would-be employer clients to visit your urgent care clinic is an increasingly common and effective marketing tool. Yet, most such visits are done with insufficient forethought.

The majority of occupational health closes are “soft” commitments—that is, there is no guarantee that the prospect will use your urgent care clinic. Hence, some type of follow-up to most sales calls is advisable. Further, it is best to actually *involve* the prospect in some manner, as prospect involvement is often the key to closing a sale.

A visit to your clinic is an excellent way to instill both a psychological and actual sense of commitment.

In addition, such a visit provides you with an opportunity to meet with a prospect on your own turf, as well as an opportunity to refine numerous processes that are likely to save your staff time down the road.

Rule #1: Schedule two clinic tours every week. For example, you might make Thursday afternoon clinic tour day and schedule two tours every Thursday at 2:00 and 3:45 p.m. Strive to fill your open slots rather than inviting prospects only as opportunities arise. Two tours per week equates to 100 tours per year—a sure fire way to bring in large volumes of new employer clients.

Rule #2: Schedule tours on days and during hours that make sense. You do not want your weekly tours to take place during busy times (e.g., Monday mornings) or usually quiet times (e.g., Friday afternoon). While it is impossible to predict the volume of walk-in patients with certainty, if your schedulers know that every Thursday afternoon is clinic tour day, they can set up planned appointments accordingly.



Frank Leone is president and CEO of RYAN Associates and executive director of the National Association of Occupational Health Professionals. Mr. Leone and David Stern, MD, CPC are scheduled to speak at a pair of half-day seminars, *Urgent Care: 40 Ways to Increase Profitability*, in Tampa and Boca Raton, FL July 25 and 26. For more information about the seminars, call Megan Montana at (800) 666-7926, extension 13. Mr. Leone may be contacted at fleone@naohp.com.

Rule #3: Make it easy for the prospect. Once a tour has been arranged, routinely e-mail prospects confirmation of the time, date, and location of the visit, where and how to park (with parking passes as appropriate), and a map and/or basic written directions to your clinic.

Cancellations are less likely if the prospect understands that you have set up an itinerary and blocked out your time. Include a basic “itinerary” of their visit so they would know what to expect.

Rule #4: Turn the prospect over to your clinic director, if possible. The clinic visit is an excellent time to introduce the prospect/new client to your clinic director, who would then conduct the actual clinic tour.

Rule #5: Establish a routine tour. Every moment of the tour should be carefully orchestrated. For example, you should provide a soup-to-nuts walk-through to demonstrate typical patient flow. Always associate a “why” with a “what” and make sure that the why implies value. Do not simply say that you have six exam rooms; say that you have six exam rooms, which expedites patient flow and offers patients more privacy, which leads to greater satisfaction.

Rule #6: Ensure that key conversations are planned. Your clinic director should be briefed on the prospect’s hot buttons and focus his/her conversation on these issues (i.e., “I understand that you are concerned with excessive waiting time. We attempt to address this concern by...”). Minimize chitchat or reciting the obvious (“this is an exam room”) and focus on the prospective “win-win” relationship.

Rule #7: Make staff introductions meaningful. Go beyond simply introducing staff by training staff members to ask the “right” questions and script the “right” answers. Your physicians and clinical staff should always ask something like, “Tell me a little about your company. What seems to be your

greatest health and safety problem?”

By going this extra step, the prospect will sense that you and/or your physicians genuinely care about their company, and are capable of providing customized services.

Likewise, registration desk personnel should be instructed to mention the same thing (or ask the same question) regarding registration processes. What you know is a carefully orchestrated (yet easy to instill) process will be perceived by the prospect as a highly organized, efficient operation.

A well-executed tour is an exceptional way to move a near-close to a real close.

Rule #8: Involve your prospect. Try to involve prospects in some type of hands-on activity. For example, have them complete a prototype registration, ask them to complete a patient satisfaction form, offer them a complimentary cholesterol check, or have them “try” a physical therapy modality. Let them “feel” your team in action.

Rule #9: Complete your paperwork and client prep. Use your clinic tour to review and/or complete all required information (e.g., “client profile forms”) necessary to expedite communication and information flow. Introduce the prospect to a liaison in billing and have them exchange critical information to facilitate subsequent billing processes. Provide prospects with handout material, including maps and appointment cards, which in turn can be distributed at their workplace.

Rule #10: End on a high note. Walk the prospect to their car and summarize your visit. Show them that extra level of respect by “staying with them” until they drive off. Remember that the most important thing you say to someone is usually as they are leaving, so you must be certain to summarize the new relationship as you part company.

A carefully planned and well-executed clinic tour is an exceptional way to move a near-close to a real close, develop mechanisms that will smooth the way once the prospect moves to client status, and cross-sell additional services as multiple members of your team become better acquainted with the prospect.

Viable clinic tours occur too infrequently and, when provided, usually fail to fully capture the moment. Incorporating the tips here into your next visit is likely to help you make the most of the opportunity. ■

completely different skill set, and survival by relying on your gut is fraught with danger.

a. Solution: Enlist the help of consultants or others who have tread the same path. Don’t be penny wise and pound foolish by refusing to pay a consultant in order to save a few dollars when the advice they give could save you thousands. Another alternative is to find someone who can support you as a mentor. Identifying someone who has “been there and done that” in the business world is extraordinarily useful.

6. Not hiring help. A mistake I made early-on was to be so caught up working *in* the business that I was unable to work *on* the business. I could have saved myself thousands of dollars and years of trial and error if I had hired some talented people at the outset and been able to spend time on business strategy, as opposed to operations.

a. Solution: Even if you can only afford someone a few hours a day (or less) make sure you have time to be strategic. The return on investment for that small amount of strategy-time will be huge!

7. Wrong motivation. When I was just out of residency and wanted to start a business, a close friend of mine who was already a very successful entrepreneur offered this sage advice: At the end of the day, if you simply spent your time working and earning wages (for me it was in emergency department) and compared that to all the debt you will incur in a start-up venture, along with lost wages and the time you will spend, you would probably be better off simply practicing medicine—particularly if your goal is merely to make money.

a. Solution: Be honest with yourself about what you hope to gain. If you love all the different aspects of running the business and all the challenges that go along with it, then opening a business is a great adventure. However, if it is simply the money you are after, there are probably better ways to maximize your return on investment.

8. Failing to support the community. Your business, and you as founder, must be good corporate citizens. This means you should help with projects important to your community (i.e., school, town, or place of worship). People will identify the good deeds with your enterprise and, consequently, your business will prosper from your involvement with other not-for-profit ventures.

a. Solution: Get involved in local not-for-profit organizations. It is a great way to form lasting business contacts and derive pleasure from your philanthropic endeavors!

A wise person learns from their mistakes, a brilliant one from the mistakes of others. Starting a business is fraught with challenges and risks. However, many of the risks can be mitigated by proper planning and execution, coupled with partnering with others who have trodden the same path. ■