# OCCUPATIONAL MEDICINE

# Identifying, Contacting, and Cultivating the 'Best' Contact Person

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Identifying the right contact person at a prospective client company begins with a sound, well-conceptualized, and up-to-date mailing list. Central to the list is the name of the individual responsible for the health and safety of the workforce.

This information needs to be verified or updated regularly, something that could be accomplished by having a clerical staff member or high school student call every employer in your database each summer.

Even when working from a list that is updated annually, you or a sales professional in your organization should place a preliminary call to a prospect company moments before the actual sales call to confirm that the information you have is correct.

A 30-second call to a company before a sales call ("Could you verify that Luc Richard is still with your company and is responsible for the health and safety of your workforce?") saves time and trouble later. This brief interview can be as important as the sales call to follow.

Note, however, that *perfection is not attainable*. A 100% "right contact person" score is simply not in the cards. For one thing, there often is more than one individual who is "the right person"—there may be many, in fact—or that individual may change by the day. Or the gatekeeper may err and provide your clinic with an inappropriate contact name. Thus, you have to frequently adjust on the fly; always be asking who is who and whether it would be more appropriate to deal with someone else.

## Contacting the Right Individual

In occupational health sales, there are cold calls, cool calls, and hot calls.

A classic cold call: just showing up at someone's office and hoping for the best is a poor idea. Not only is it invariably a waste of precious sales time, but it is also an easy way to alienate a prospective buyer.

A cool call involves a professional and customized letter and/or phone call as an entrée for a face-to-face meeting. Not bad, except the author or caller is likely to be viewed as just another salesperson and quickly forgotten.

A hot call is a cool call with some sizzle. A hot call is one in which the groundwork has been done via an astute name recognition/marketing campaign so that the recipient is more likely to be aware of who you are and what you represent.

This process begins with fundamental marketing, which has everything to do with ensuring that as many prospects as possible know who you are, what you do, and what sets your clinic and its services apart from any other option. If your clinic has done a good job in this regard, there is a greater likelihood that the prospect will know who you are going in and offer you the time that you need.

## Cultivating the Right Individual

Cultivation involves discipline and patience.

- Clearly articulate who you are, what your program does, and the objective of the interchange, whether it is by letter, phone, or in person.

  A brief entrée might be something like "My name is Mike Roll and it is my responsibility to speak with employers such as yourself to learn more about your challenges and see how our clinic can help you address those challenges." The "cut to the chase" proviso is alive and well in the world of occupational health sales.
- Never shut the door when you can leave it open a crack. Always look at defeats at the sales counter as temporary. It is best to pick up your marbles and set the stage to come back and play the game another day.

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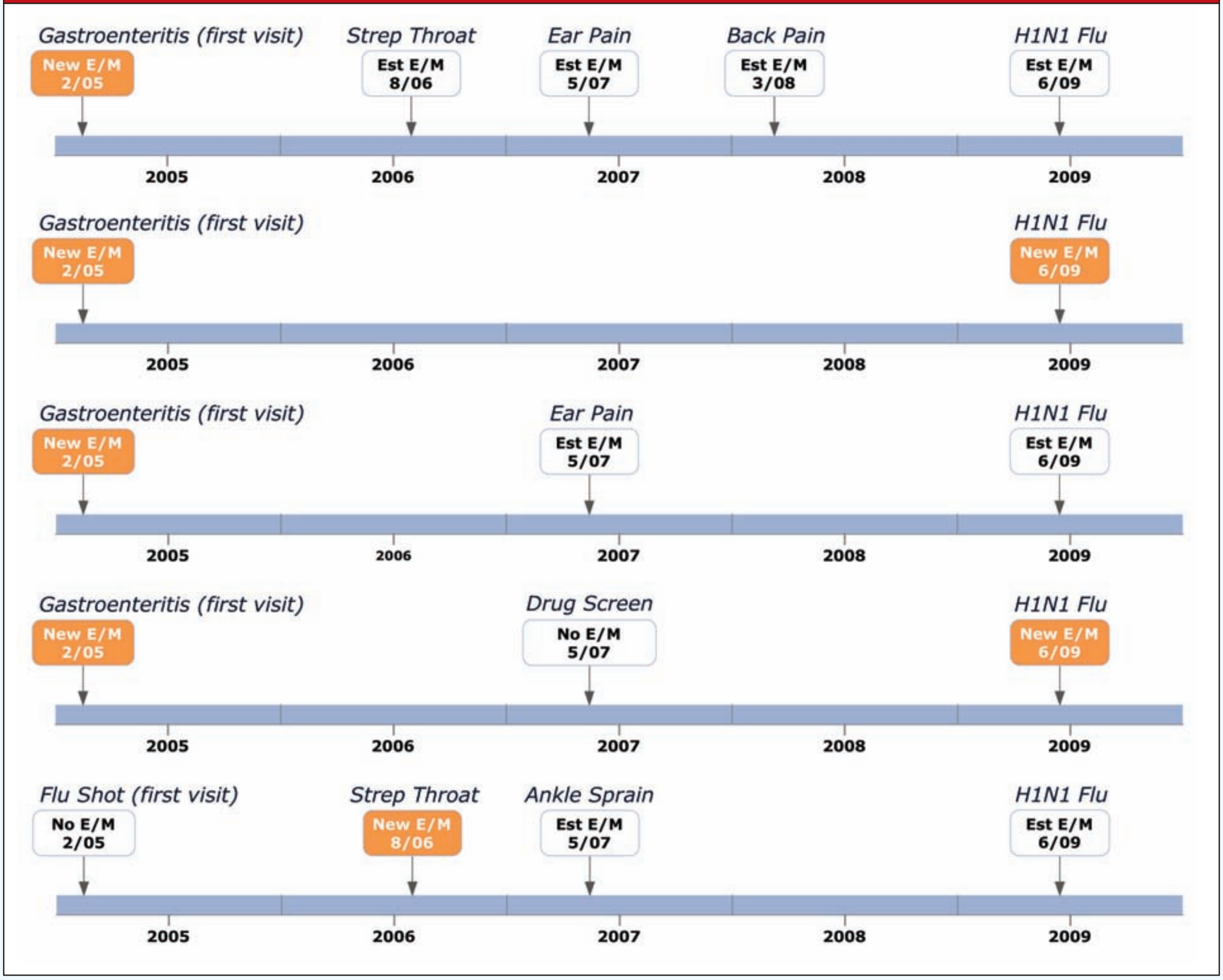
**Figure 1. Established vs. New E/M** *(Real Life Examples)*

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It is always useful to have a "freebie" tucked in your portfolio. It may be a complimentary subscription to your low cost e-mail advisor (a good reason to create such an advisor), an invitation to a conference or a meeting, or a free password to valuable password-protected areas of your website. Prospects are often impressed by such tenacity and fair play.

- Stay in touch and use multiple modalities. Strike a balance between being sufficiently visible and being a nuisance. Call the prospect every few months and take the high road; ask them what you (or your clinic) could do for them and check in to see how things are going.
- Keep your prospect pipeline "just right." Occupational health sales professionals tend to err on both sides of this equation; often, the pipeline is insufficiently full, meaning that you are counting on a small number of prospects to come through soon. Or the pipeline is too full; that is, you simply have too many prospects in various stages of development to manage each of them as well as you should.

The axiom "time is money" rules the roost in occupational health sales. Nothing seems to take more time than pursuing dead-end leads. There will, of course, be many dead ends; the secret is to minimize them by developing and executing a proactive plan to identify, contact, and cultivate the right person. ■