AMERICAN HEALTH CONSULTANTS

Occupational Health Management™

A monthly advisory for hospital-based occupational health programs

GUEST COLUMN

Show your best points at sales presentation

By **Georgia Casciato**
Health Care Business Development Consultant
Chicago

Imagine the next time you face an opportunity to meet with an employer prospect to discuss your occupational health services. You've been told in advance you have 45 minutes to "make your presentation." Since this appointment was made over the phone, you know little about the needs of the prospective buyer and are unsure as to how to structure the presentation so it responds to the prospect's major hot-button issues.

What do you do? Do you roll out the same presentation that you used on three prospects last week, or do you try to tailor your presentation to this client? And how do you go about highlighting your strengths and downplaying your weaknesses?

This is a common scenario for anyone working in occupational health sales. A salesperson secures an "invitation" to meet with a prospective buyer to "pitch the business" and ponders from the time he or she gets off the phone until the face-to-face meeting with the prospect just what to say. The goal, of course, is to increase the likelihood of converting this prospect into a customer.

The real challenge for the salesperson is knowing how to make the most of this opportunity and increase the likelihood of getting business when requested to make a presentation in front of a prospect he or she knows little about.

AMERICAN HEALTH CONSULTANTS

Occupational Health Management™

A monthly advisory for hospital-based occupational health programs

The key to a successful outcome in this sales situation is founded in the ability to maintain control of the sales process and go through the appropriate channels, including the necessary diagnostics prior to presentation. Don't get too complacent just because you're able to "wing it" successfully a time or two. When a presentation succeeds in the absence of taking the time to thoroughly understand the needs of the prospect, you're just lucky. That is not a path to continuing success.

Salespeople often put themselves at a disadvantage with their zeal to make a pitch that demonstrates value to the prospect. Unfortunately, they overlook one major factor: How can they convey value to a prospect when they have not taken adequate time to understand what value means to the prospect? Value is not a one-size-fits-all concept. How you work through this process with the prospect is key to the outcome of the sales interaction.

This situation is further complicated by the fact that many prospects are neither willing nor able to help salespeople — help them, thereby further validating the need for occupational health salespeople to have superior skills in managing prospective buyers and the process.

Does the client really want a presentation?

With that in mind, here are some step-by-step suggestions for maintaining control of the sales situation and turning a presentation opportunity into a client relationship:

1. Upon agreeing to make a presentation, find out exactly what that means.

Many times, salespeople can redirect the presentation expectation of the prospect into more of a first-time fact finding and informational meeting. When they say "we'd like a presentation" over the phone, find out exactly what the expectations are for the interaction, including who will be there, how they interact as a group, the decision-making process, and the time frame.

If the prospect says this is just an information-gathering meeting and you detect no real urgency, it is an easy conversion to a fact-finding interview-like process that you can direct.

Remember, without knowing what the pertinent issues are, you won't know what you should present at this requested "presentation."

2. Make a checklist beforehand of what you must know about the prospect by the end of the meeting.

The goal of a first meeting is to learn more about the prospect than they learn about you. These are some typical open-ended questions that work well to uncover needs:

• Why did you agree to meet with me today?

• How does your company define its occupational health needs?

• Why does your company think these services are important?

• Would you please describe your experience with providers who offer occupational health services?

Start with more broad-based, open-ended questions that get the prospect talking, followed by closed-ended questions to secure the agreement and create a list of urgent, prioritized issues that your program can respond to. The worst outcome is to conclude a sales meeting with the prospect knowing a lot more about you than you know about the prospect. That leaves the salesperson with little leverage or sufficient knowledge to move the prospect to the next step.

3. Take the upper hand in positioning the first meeting.

As much as possible, try to steer the interaction so that you have more control over how you proceed with the interview and presentation. Dialogue like this can be very helpful in establishing the right platform for interactive selling:

"My role in working with clients is to help them set up appropriate services that respond to their business needs. For our first meeting, I would suggest that we take time in the beginning to make sure I understand your needs and concerns, along with more detailed information about your company. This background will allow me to share relevant case studies from the more than 500 clients we serve. Would this be of value to you?"

Prospects almost certainly will answer yes. They love the opportunity to learn from other companies and see the experience as a chance to "keep up with the Joneses." The bottom line is that the interaction will allow you to create value for the prospect while gathering information you need to make a sale.

4. Take it personally.

Build rapport with your prospect before getting down to business. People love to talk about themselves and their businesses. Use the opening minutes of your first meeting as an opportunity

AMERICAN HEALTH CONSULTANTS

Occupational Health Management™

A monthly advisory for hospital-based occupational health programs

to bond, get closer to your prospect, and establish a platform for relaxed interaction.

5. Remember that knowledge is power.
Find out as much as possible about the prospect's motivation for wanting the meeting. Resist the temptation to talk too much about your services until you thoroughly understand the needs of the prospect. The more you know about the prospect and his or her motivation in seeking services, the better opportunity you have to sell them.

6. Understand the needs and pains of your prospect.
In the words of Steven Covey, author of the *Seven Habits of Highly Effective People*, "First seek to understand, then to be understood." The key to converting an opportunity into business is to think more like a consultant or diagnostician and less like a stereotypical salesperson. Just as a physician would not treat a patient without first diagnosing the problem, neither should a salesperson propose solutions without thoroughly understanding the problems and issues of the afflicted, which in this case is the prospect.

Without understanding the needs and pains of the prospect, it is impossible to craft solutions that are meaningful and demonstrate value to the purchaser. As a patient, think about how you would respond to a physician who outlined a treatment plan in absence of talking with you about your medical problems. Why would a prospect do business with someone who has not taken the time to understand the business problems? You are there to help, *not* to sell the prospect. The sale is merely the by-product of the interaction.

Talk about the features your prospect wants

7. Focus carefully on your program's features and benefits as they apply to the prospect.
A laundry list of all your program's features and benefits has little worth to a prospect if it does not respond to his or her needs, positioned in a framework that makes sense. If a presentation does not connect to the needs of the prospect, the likelihood of a conversion to a client relationship is significantly diminished. Resist the temptation to fall into show-and-tell selling. But on the other hand, don't fall into the trap of responding in a very general way to "Just tell me what you've got."

When a prospect mentions an area of concern, don't rush in prematurely with solutions. Take a deep breath and ask three more detailed questions about that area to help you formulate a more detailed response. You should take enough time to understand what the prospect values before attempting to convince the prospect you can deliver it. This behavior alone can be a key point of differentiation between you and your competitors. People want to do business with people who understand them and their issues.

8. Let your prospect be your guide.
If the presentation is handled well, with detailed questions from the salesperson, the prospect will tell you everything you need to know to make the sale. It is amazing how many times after this type of interactive meeting, prospects will tell you how much they enjoyed your presentation. Actually, what the prospects enjoyed was the opportunity to talk about themselves, their problems, and their needs. Even if they don't realize how much you are doing it, they appreciate your assistance in helping them articulate their issues in a prioritized and targeted manner.

Make the whole meeting interactive

9. Use props and materials in an interactive manner.
If you're positioned yourself as a consultant rather than a stereotypical salesperson, you should use sales props in an interactive way. They should be tools that encourage you and the prospect to interact and exchange information. For example, you could use a brochure this way instead of just handing it over to be read later: "At the request of our clients, we have extended our service hours as illustrated in this brochure. Would this schedule meet your needs? What hours of service do you see as important in meeting your company's needs?"

10. Understand that the presentation is a step in the sales process, not the sales process itself.
If initial meetings have resulted in the opportunity for a more detailed presentation to the individual or group, enough detailed information about the prospect's company and the issues should have been gleaned from earlier meetings to make a very targeted presentation. I recommend using this rule of thumb: You should uncover three to five business issues that your

AMERICAN HEALTH CONSULTANTS

Occupational Health Management™

A monthly advisory for hospital-based occupational health programs

services would provide solutions for.

The key to making this work in a presentation format is to get confirmation on these issues and the degree of importance they represent to the company prior to a more formal presentation.

If you find yourself sitting at a table with a decision maker who was not part of the earlier meetings, take time to backtrack and make sure his or her issues are consistent with earlier conversations. Articulate those issues and ask for agreement, enhancement, addition, or deletion from the new decision maker. That will minimize the chance of last-minute failure.

Flexibility and adaptiveness are key success factors. The best presentation a salesperson could give about the occupational health program is meaningless if it does not respond to the decision maker's key issues and buying signals.

Before ending the first meeting, be sure to establish an agreement with the prospect about what the next step will be. Otherwise, you may have to endure a series of unreturned phone calls made in an attempt to further the interaction.

[For more information, contact Georgia Casciato at (630) 969-1530.] ■