Personalize your lab's outreach selling strategy, inside and out

By Peter T. Francis

Picture this scenario: A sales account representative sits with his boss at a conference table reviewing his prospects. He starts with a client with whom he has been interacting for more than a year. The rep has met the physician briefly on two occasions and has had several informative appointments with the doctor's office manager. He has also introduced himself to the doctor's nurse and given her information about a new test his lab recently introduced. This potential client has illustrated, up to this point, no issues with the incumbent lab and, therefore, has seen no reason to change lab services.

A portion of your strategy decodes into personalization. Labs can learn this on their own initiative — or they can learn it from the competition.

To begin the conversation, the manager asks the field person for background information on the decision maker — the physician. The representative opens his folder and reads aloud: "Married and has a son in Boy Scouts. Passionate about golf — has a 20 handicap. Likes vintage rock and roll. Graduated from U of Michigan Med School in 1975. Huge U of M football fan. Completed oncology fellowship at Johns Hopkins. Birthdate — Feb 16. Sees ~20-25 patients a day."

Of course, the report includes additional facts (e.g., perception of current lab service, the office manager's name, connectivity information, insurances, how long the incumbent lab has been entrenched, and so forth). As noted above, a great deal of the dossier contains personal characteristics about the decision maker's habits and lifestyle. Does listening to this "trivia" seem eccentric and a misuse of management's time? Not at all. For most lab sales reps, however, this kind of discussion with their manager would appear unorthodox. Maybe so, but the master-class marketers know and maintain this background compilation, using it to their advantage. Lab reps who uncover this detail understand the necessity of knowing their clients and prospects — inside and out.

Not only does this information help the salesperson as he works the client through the pipeline, but it also has significant benefit should he leave the territory. It gives his replacement a big edge with background data right from the start. The other aspect that requires underscoring is that this nitty-gritty intelligence should be culled from various staff members, especially those who are influential in the lab's decision process. Placing all of your eggs in one basket with a single contact person symbolizes a precarious strategy. By uncovering this information with key people, you dig your well before you are thirsty.

Climbing the relationship staircase

A salesperson may ask the question, "Why do I have to find out so much personal stuff? Why should I clutter my head and files with this kind of insignificant material?" For one thing, it establishes the rep as an effective listener. Research has shown that good listeners sell more and maintain their clients longer. The other reason equates to engineering very effective relationships utilizing this kind of data. Forging a strong business rapport corresponds to a *process* — it is not magic, not chemistry, nor luck. And, because a process exists, it can be learned and replicated.

The "relationship staircase" reflects six relationship levels you can have with another person (ascending from the bottom):

People who value a relationship with you
People who respect you
People who are friendly with you
People who like you
People who know your name
People who do not know you

The last two steps endure as the most challenging and time consuming to achieve. Most business relationships are at the "know your name" step — or maybe at the "like you" stage. The *successful* sales representatives, however, yearn to progress higher; they do so partly by performing unexpected, unselfish acts using the aforementioned personal data.

This could translate into sending a birthday card, finding an article that pertains to the client's interest and giving it to him, presenting a Playbill magazine from a play the client wants to see, or a review of a book/movie the customer mentioned. The list can be exhaustive.

Questions a sales rep can ask a client tend to fall under eight major headings:

1. Important dates (e.g., birthdays, anniversaries, employment)
2. Special interests
3. Important people
4. Important goals (business and personal)
5. Major events (marriage, illness, religious holidays)
6. Favorite foods
7. Schools attended
8. Important places (e.g., vacation spots)

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Doing something unexpected and thoughtful does not always produce immediate results (it may not produce *any* results!), but it demonstrates interest in the other person. Everyone has an invisible tattoo on his forehead that screams, “Make me feel important.” Indeed, by knowing what your business contacts treasure in life, you can make them feel important by performing unanticipated acts of kindness.

The astute sales rep creates a form listing the above eight components (followed by a space for entries). Under each section, there is a line for “Action Taken.” Those activities (over time) confirm the representative’s professionalism, integrity, caring attitude, and knowledge — setting him apart from the general milieu of sales reps. After all, differentiating (the lab *and* the sales rep) endures as a key component of selling!

Three steps to building a good relationship

To build a positive business relationship, there are three steps:
1. What you think (i.e., your mind-set);
2. What you ask; and
3. What you do.

What you think

Salespeople may not always think consciously about having the right mind-set when establishing a business relationship. If a prospect has shown disinterest, exhibited abruptness, or canceled an appointment, the field representative may carry a pernicious feeling toward the entire account. This can be devastating when you are trying to create a good rapport and partnership. If the salesperson decides he cannot have a relationship with a certain influential person or key decision maker, then, guess what? He cannot. As seminal as it may sound, possessing the right mind-set remains *crucial* to establishing a good business relationship.

What you ask

The information you gather by asking questions acts as an essential component to creating a good relationship. As mentioned in the beginning, learning about people’s desires, passions, and hobbies outside of the job predominates as a *very* important constituent. The great paradox of selling embodies the notion that the *less* you care about the sale, and the *more* you care about the people you sell to, the more you sell. This conduces to asking questions — knowing your customers inside-and-out and understanding some of their personal habits and outside interests.

It also allows you to seek common ground, an especially strong aspect of creating a bond. Common ground equates to an onion’s outer skin. It carries you to a more intimate level of information. The more you can peel the layers of the onion, the more you can intensify the relationship. Examples of common ground range an entire gamut: cars, clothes, sports, hobbies, pets, friends, art, music, alma mater, hometown, jewelry — the list is endless.

What you do

The third point — what you do — stands as self-explanatory. To understand your client’s background and interests is one thing; however, what you *do* with that information matters significantly. When the salesperson performs unselfish deeds, he gains respect, credibility, and trust. In addition, *how* the representative carries through when the client requests assistance remains a key component. If the salesperson falters on the execution or takes longer than expected to resolve an issue (without notifying the client), his credibility takes a belly-flop!

Forging a strong business rapport corresponds to a process — it is not magic, not chemistry, nor luck.

A two-way street

Business relationships go both ways. When you ask questions of your clients and prospects, they (silently) ask questions about *you*. It may be an unconscious reaction on the client’s part, but the top representatives know that the person across from them mentally thinks about the representative:
1. How good does this person do his job?
2. What experience does he/she have?
3. Does this person really have my best interests at heart?
4. Can I trust this person?
5. Is this someone with whom I can work with at a professional level?

You do not simply announce, “I am good at what I do” and “Of course, you can trust me.” It typically takes a number of interactions before the client holds trust in the salesperson.

Final thoughts

Average sales people frequently steer the prospect that has “pain” into account activation. The *great* salesperson can activate the “no pain” customer into a good account. Part of this strategy deals with getting to know *thoroughly* your prospects and then acting on that knowledge. The old adage, “knowledge is power” prevails in truth. But knowledge does not become power until someone *uses* it.

The scenario mentioned in the beginning of this article has a happy ending. Through the boss’s coaching, the representative followed up on some of the knowledge he had accumulated. He requested a copy of the U of M/Ohio State football game program which had just been played (U of M was victorious!) and gave a copy to the doctor. Several months following that, the rep ran across an article on Roy Orbison, which he gave the doctor and included a personal note with it. He also presented a birthday card to the office manager. Within a year, the representative claimed a new account — not so much because his lab was that much different than the incumbent lab — but because he “out-cared” the incumbent lab.

Whoever determines the culture within the lab, it stands as an important constituent to ensure that salespeople get proper training, recognition, and an understanding of your sales strategy. A portion of your strategy decodes into personalization. Labs can learn this on their own initiative — or they can learn it from the competition. ☐

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