

## 30 Sales & Marketing Tips to Prosper in 2006

By Frank H. Leone

This issue of the *Advisor* completes our fourth year of publication. As the sole author of 35 of the 48 issues to date, I thought it would be valuable to abstract 30 recommendations from these issues in order to provide readers with a “jump start” to their 2006 sales and marketing plan.

### Sales Skills and Techniques

1. **Convert negatives to positives:** “You have a problem” should be “You have an opportunity.” “You have a high injury rate” becomes “If we can help lower your injury rate, it would result in lower workers’ comp costs.” (July 2005).
2. **Orchestrate clinic visits:** Make clinic tours easy for the prospect. Schedule tours at a convenient time. Plan conversation points with key personnel in advance, and complete paperwork (e.g., billing) while the prospect is onsite. (April 2005)
3. **Be a great communicator:** The great communicator expresses even the most complex topic in a simple and direct manner. Vary your pace, listen and probe intently, and maintain a focus on your inherent message. (January 2005)
4. **Become an effective public speaker:** Principles for effective public speaking include offering the audience a clear objective, involving them from the outset, not forcing your movements, speaking from the heart, minimizing audiovisuals, presenting a challenge, and showing genuine appreciation for everyone’s time. (August 2004)
5. **Consider the fear factor:** Recognize the potential importance of a prospect’s parochial interests during a sales encounter. Structure questions to determine where your prospect sits on the “care about my company/care about me” continuum and adjust accordingly. (June 2004)
6. **Focus on the Golden Minute:** The first 30 seconds and last 30 seconds of a sales call tend to be more important than all of the activity in between. Develop an orchestrated routine for both segments, including a sign of respect and the roadmap at the outset, and the summary, handshake and “from the heart” close at the end. (April 2004)
7. **Capitalize on the herd mentality:** For every early adaptor or resister, there are 10 others who prefer to follow the crowd. For every buyer who buys offensively out of desire, 10 buy defensively out of fear. Practice herd mentality selling by discerning to what degree your prospect is a defensive buyer. (December 2003)
8. **Be upbeat and prepared:** A positive attitude is invariably a self-fulfilling prophecy for success. Respect the prospect’s time, qualify every suggestion (“in my opinion”), guarantee nothing, and memorize key points. (July 2003)
9. **Use personality profiling:** Individuals can usually be characterized by one of four personality types (dominant, influential/sociable, steady, compliant). Refine your presentation to match the decision-making style of the prospect. (June 2003)
10. **Get to “Yes”:** Resist the use of tired closing jargon or simply asking for the order. Instead, establish a sense of urgency (“According to your figures, you are spending \$10,000 a week, or \$2,000 a day, on workers’ compensation. The sooner we get started...”). (May 2003)
11. **Use questions to generate sales:** Speak no more than 20 percent of the time during a sales call. Use most of the time to ask relevant questions and probe. Move the prospect through a logical sales process: generate interest, establish credibility, identify needs, attain commitment, and close. (January 2003)
12. **Structure your sales call:** Carefully plan several key components of your sales call including your opening statement, the “roadmap,” your program benefit statement, your basic close/action step, and your final comment. (July 2002)

### Marketing and Outreach

13. **Create an Employer Advisory Council:** Let employer members drive the agenda; maintain a desired membership level and term limits, elect a rotating council chair each year, and add council information to your website. (May 2005)
14. **Draw attention:** Draw attention to your services in a world of finite attention spans. People notice and remember – the unique rather than the traditional. In most cases, take a chance on something unproven but new, rather than stick with a “proven” yet forgettable approach. (December 2005)

15. **Simplify and repeat your message:** In our complex, information saturated world, you must keep your message simple, keep repeating it, and use multiple modalities (e.g., voice mail, email, website, direct correspondence) to resonate with your prospect universe. (March 2004)
16. **Market on a shoestring:** New communication channels have made it easier, less time consuming, and less costly to market services. Use modern outreach vehicles such as email, voice mail, audio-based education, and your website in order to effect optimal marketing on a shoestring budget. (November 2003)
17. **Use customer service to enhance business:** Focus on excellent customer service. Hire people-oriented personnel, develop a written customer service plan and involve all personnel in this ethic. Provide ongoing training, evaluate continuously, and reward exceptional service. (August 2003)
18. **Use email:** Effective sales are in the details and email "paper" trails can be used to preserve this detail. You can write an effective email in less than a minute and who knows how many in an hour? Be an icon of productivity. (October 2005)
19. **Use physicians in sales as appropriate:** Your physician(s) may or may not be an asset. Consider the nature of your market and the physician's inherent sales/marketing savvy. Define the physician's time commitment, parameters for participation, nature of handpicked prospects, and appropriate follow-up in your sales plan. (March 2003)
20. **Market through education:** Although live educational seminars and conferences and printed newsletters may still have a place, the education card can more cost-effectively be used through web-based audio education, periodic email blasts, and audio forums. (February 2003)
21. **Embrace change:** Maintain an active plan to periodically assess every aspect of your program. Adjust your plan in response to changing market realities. Try at least one new marketing initiative every year. (February 2005)
22. **Proactively manage internal marketing:** Maximize internal support by aligning your program's goals/objectives with those of your parent institution. Request specific quantitative expectations, involve senior management in periodic hands-on activity, and broadly share your successes. (October 2004)
23. **Use sales metrics:** Maintain and analyze sales metrics such as quality telephone calls, face-to-face sales appointments, prospect/client conversion rates, the mean dollar value per relationship, and new revenue generated per sales professional. (May 2004)
24. **Employ software:** Sales contact management software reduces administrative time. Act! Goldmine, Sales Forc, and OccSoft are viable options as are components of STIX and SYSTOC software. (January 2004)
25. **Be a leader:** Leaders recognize a need for balance and the empowerment of future leaders. As the eyes, ears, and voice for their program, an occupational health professional must strive to become more of a leader. (November 2005)
26. **Motivate:** Include an effective feedback system, appropriate training, an inspiring workplace climate, and practical, challenging, specific, and understandable goals in your pro-active plan. (September 2005)
27. **Protect your position:** If your program is the local market leader, protect your base by staying close to your customers. Expand both horizontally and vertically. Focus on competitor vulnerabilities, leverage down economic times, and watch for market share slippage. (December 2002)
28. **Hire the best:** Learn more about a candidate by asking such questions as "If I asked the 10 people who know you best about your best traits what would they say?" or "If you were hiring a person for this position, what four traits would you look for? Why?" (October 2002)
29. **Manage time:** Fine tune your job description, hand off customer service, cluster your hours by activity type, tighten meeting times, use scripting, and don't obsess about the little things. (May 2002)
30. **Employ "win-win" incentives:** A "win-win" incentive plan is gross revenue based, never capped, paid quarterly, layered for higher compensation for higher levels of achievement, and supplemented with non-financial rewards. (April 2002)

### Sales and Marketing Management

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