

## Effective Sales Requires Organizational Commitment

*The following is excerpted from the Occupational Health Sales and Marketing text written by Frank Leone, president and CEO of RYAN Associates, and Carolyn Merriman, president of Corporate Health Group.*

As providers become more business savvy, their sales and marketing functions also must change. The provider-based occupational health program must be profitable, hold and increase its market share, demonstrate and measure success and enhance long-term relationships with key target customer populations. Sales and marketing plays an integral role in the context of each of these objectives.

During the 1980s, health care organizations shifted to a more decentralized service line management and customer-oriented approach. While this approach may have enhanced fee-for-service strategies through the development of "Centers of Excellence," it often failed to meet the customer's desire for one-stop shopping, ease of access, portfolio or packaged service purchases, and a single point of contact.

Successful organizations are now shifting from the product/service line model to a distribution channel focused on target audiences, such as employers, and how their needs can be addressed across the purchasing continuum. This change requires the organization to redefine the way it goes about building, managing, growing and retaining relationships with employers, and how products and services should be integrated or coordinated to best meet the needs of target audiences. For example, employers can be a target audience for direct contracting, injury treatment and care management, wellness, fitness, education, health screenings, employee assistance programs, behavioral health, home health and rehabilitation.

### Sales Function Requirements

The sales function requires an administrative sponsor and senior management commitment to specified sales outcomes and their value to the overall success of organizational strategic initiatives.

Whatever the reporting structure, sales professionals should have an office space where they can make confidential calls, maintain confidential client records, or meet with clients (e.g., after a tour has been conducted). The sales professional should have ready access to all clinical and operations staff. Ideally, the sales professional should also have access to a personal computer, appropriate word processing, spreadsheet and sales contact management software, be equipped with a pager and a cellular telephone, and receive a car allowance.

It is also crucial for health care organizations to clearly identify the administrative and operational manager of the sales effort. Providers are advised to develop dedicated positions focused on specific sales, marketing and customer service functions. These positions should be tied with performance management systems and incentivized accountabilities to ensure both short- and long-term accomplishment of organizational initiatives and objectives.

An organizational commitment to overall sales may be cultivated by:

- Establishing a two to five year span to measure results.

- ❑ Building benchmark success measures which match the maturity of the business initiative, service line offerings, customer sophistication and performance accountabilities, and measurement expectations.
- ❑ Committing appropriate financial resources to establish sales, sales and marketing support, collateral materials, operations and product development, and customer account management mechanisms with the customer in mind. Ensuring that the top management team receives sales training and knowledge so that they have a base from which to establish an appropriate sales operation to meet their organizational goals and objectives.
- ❑ Assigning a senior level manager to sponsor and oversee the strategic initiatives and integration of sales into the organization. Establishing internal mechanisms for departments and service lines to work collaboratively and effectively to meet internal and external customer needs.

