Marketing Savvy:
Strengthen Your Sales Efforts through Effective Issue Resolution

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Think about how you prepare for a typical sales call to an existing client. You plan your visit. You outline your objectives. Then, you cross your fingers and hope that your customers are delighted with their service experience.

But, what happens when they aren't? The first thing you instinctively do is take a deep breath and ask for more details. You assure the client that this incident isn't typical and make a promise to look into resolving the problem.

If the problem is yours to resolve, you take care of it. But if it's not, there are a number of questions to answer:

- What department is responsible for this?
- Who works with the client to resolve the issue?
- How do you learn whether it's been resolved so you don't encounter dissatisfaction on your next visit?
- How do you determine how many other companies are having difficulty with the same issues?

Dealing with these issues — and getting answers — is a key role of the occupational health sales team. Yet many are uncomfortable fulfilling it because they are out of touch with what actually happens with the issues once they're found.

In this article we'll look at how to move from a reactive to a proactive approach to issue resolution management and how to create a sales and operations partnership for handling that process.

Is Your Approach Reactive or Proactive?

A reactive approach is one that relies on resolving issues as they come to your attention. If you find yourself hoping that your visit won't uncover anything displeasing, then your approach is reactive. You likely do a great job of addressing the issue when you find it (if it's yours to resolve), and you take care of the immediate matters at hand. The client is usually satisfied if the issue is resolved favorably, and then you go on your way and wait for the next issue to surface.

In reactive mode, your client judges you by how well and how quickly you resolve the issue that's been brought to you. But what happens if the issue is beyond your control to resolve? Additional factors associated with reactive problem solving are:

- Problems are handled as they arise with no consistency; many hands, different fixes, and no awareness of an operational barrier.
- Issues that aren't safety or clinically oriented aren't documented, thus hampering your ability to quantify the level of the problem or the need for resources to resolve it.

In proactive mode, you effectively use your sales calls to review current client utilization, listen carefully, and determine whether the things you hear are, or might become, issues. You then bring those issues back to the appropriate leadership in your organization, and begin to think about how the things that might become issues will be resolved.

Another feature of a proactive approach is a shift in thinking. You consider how processes or process changes may adversely affect the client so as to avoid the development of an issue. With this type of thinking, you're effectively heading off issues before they ever develop.

While there are pros and cons to each approach, the proactive one typically creates a more satisfying environment for both the client and the service provider. When your thinking is focused on systems and processes to avert or manage issues and staff is trained to have heightened awareness to manage and communicate around the issues, the entire customer relationship and service environment become much more effective.

This entire process is based upon a strong relationship between sales and operations. While the sales team often handles many of the issues, operations will ultimately be in a position to resolve most of them. Having a model for working together is key.


A strong relationship between sales and operations is key to satisfactorily resolving client issues

A Model for Issue Resolution

Making your service "easy to do business with" is critical in this process. After all, a big part of the role of the salesperson is to stay abreast of needs, match the needs of the company with your offerings, and address issues as they arise. Let's assume that your goal is to create an environment that's proactive in issue resolution. Here are some ways to achieve that:

Ask the Right Questions

A key part of any salesperson's repertoire is a stockpile of effective questions. These questions are focused on the strategic issues that might be facing a company and might present an opportunity for you to partner by providing added services. The questions that are most effective are typically strategic and operational in nature. Some conversation starters with clients can include the following:

Strategic

What are three key issues facing your organization in the next three years?
What would you like to see happen with those issues?
What kind of help do you feel you will need to address them?

Operational

What are the key reasons you utilize our services for your occupational health needs?
What do we do well in serving you?
What could we be doing to serve you better?
What one thing could we improve in delivering service to you?

These questions begin to position you and your service as partners for the business, not just providers of episodic care. For example, if you find that one of their key strategic issues is over-utilization of their healthcare resources by employees — thereby driving up costs — you now have a concrete issue to bring back to your leadership for discussion.

Then you can discuss the things that you, or the sales department as a whole, could do to help the client determine if there is over-utilization. Armed with those ideas, you can consider what to propose as a way to assist them in managing utilization.

On the operating side, maybe they have an issue with the availability of pre-employment physical slots during their busy hiring season. Think about what you can do to help to make more slots available. Better yet, if you're being proactive, you can get them to project their needs by hiring season so that you can prepare internally for how to handle that added demand.

Do the Right Thing with the Issues You Discover

Too often the sales team discovers a strategic or operational issue that is out of their hands to resolve. When this situation occurs, one of two things happens: the issue goes to the leadership of the department, or the issue goes to the leadership of another applicable department. It's very common for the salesperson to lose the issue at that point and never know if it's been resolved — until the next visit to the client. And that's when a lot of finger-crossing occurs.

One of the most effective ways to ensure that clients are satisfied because issues are indeed being addressed consistently and in a timely fashion is for the department to develop an issue-resolution accountability and tracking process. Here's how it works:

- The sales team, or any other person in the department, discovers an issue. The issue could be as simple as "I waited too long in the exam room," or as complex as "Employees aren't being seen according to protocol in the emergency department."
- The issue is entered into a common database, and is described more fully in terms of time discovered, expectations for resolution, timeframes for resolution, and who is accountable for resolution.
- All issues entered are accessible by the sales team and those resolving issues, and reports are generated regularly.
- Reports are reviewed for progress and to determine where there are specific problems that are widespread or strategic in nature. If three companies are having difficulty interpreting the format of a particular report you have a trend that can be addressed and resolved long term, instead of being resolved individually for each company at varying points in time.
- The team is held accountable for entering issues into this system, as well as for resolving the issues assigned to them.
- Staff may have a portion of their performance review and pay contingent upon management and responsiveness to customer issues.

Having a defined process for issue resolution makes the salesperson much more effective. It also serves as a pre-visit review tool so that anyone visiting the client is made aware of any outstanding issues and knows how well the resolution is working.

Maximize Your Internal Partnerships

In order for a formal issue resolution process to work you need a strong partnership between the operational leadership of the program and the sales professionals supporting it. The sales team has to believe that the operating team will value the input and take action to resolve the issues, and the operating team must view the sales team as credible and cooperative in the issues that they submit. When the two work together in this setting, you start to build trust.

Some ways of maximizing that partnership include:

- Joint reviews of the database.
- Regular updates of resolved, outstanding, and new issues.
- Periodic review of issues to look for repetition across multiple areas.
- Identification of the top three issues for attention and, using a team approach, establishment of an overall agreed-upon process for improvement.

- Regular meetings to plan the sales update call and share operational information.

Where It All Comes Together

A supported issue resolution process ultimately becomes the conduit for the collaborative partnership between operations and sales. Imagine how much better your service can be if you commit to this partnership today. You'll clearly differentiate yourself from others in the market and impress your clients as being an organization that really makes a difference.

6 Ways to Address Your Clients' Issues

1. Acknowledge how they're feeling. This first step validates their perspective and begins to diffuse feelings of anger. Use language such as, "I understand why this issue is of concern to you."

2. Apologize for the situation. Say, "I'm really sorry," and mean it. Acknowledging and apologizing are two ways of taking steps toward resolution.

3. Ask questions to help identify the issue. Use phrases like, "Tell me more," or "Please describe the situation and its impact on you."

4. Act upon the issue. Establish a mutually desired outcome and either take care of it immediately, or agree upon a plan and timeline for resolution.

5. Accept the issue by documenting it and assigning accountability. Follow up to make sure the resolution is working.

6. Advise those affected by the issue so that larger trends and patterns can be identified for resolution.

In order for issue resolution processes to work, you need a strong partnership between your operational leadership and sales professionals.

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Imagine how much better your service can be if you commit to this partnership today.

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