

Call Plan: Physician Office Manager

1. What is your long term “strategy” for this customer or prospect?
 - a. **Acquire a significant portion** of the relationship by demonstrating an understanding of the industry trends, the current and long-term needs of the practice, and the tangible and intangible needs of the office manager. I will accomplish this by spending time understanding the manager’s day-to-day practice operations and positioning myself as a resource for “ideas” and “expertise”. Bring over 8 product categories in 18 months.
 - b. Spend time learning and understanding the industry in which the practice operates.
 - c. Use any opportunity (personal or business) to build the relationship.
2. What is your objective for this call?
 - a. Identify, at a minimum, one sales opportunity that result in a next appointment.
 - b. Demonstrate my knowledge and understanding of some of the key issues in the day-to- day operations of the practice.
 - c. Get to know the office manager.
 - d. Understand the practice’s current objectives.
 - e. Understand the 3-year view.
 - f. Understand how the practice operates, its specialties and types of services offered.
3. What is your strategy for attaining your call objective?
 - a. Get the office manager talking early in the call.
 - b. Review with them their current relationship with their bank.
 - c. Demonstrate a degree of industry experience by talking about some of the key industry issues and the homework you’ve done on the practice. (First Research, information from the practice’s web site, news articles, etc.)
 - d. Compare the current practice operations with the 3-year view. How will the practice operations and financial needs change? How can we help?
4. Build the questions you will ask to discover and develop the needs of this client or prospect.
 - a. “When did you first begin working with this practice?”

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- b. "What made you decide to become an office manager?"
- c. "How long have you been in an office manager role?"
- d. "Can you identify one or two things that you think were your keys to your success?"
- e. "Managing the day-to-day operations of a practice these days is tough. What changes have you seen in this practice since you became the office manager?"
- f. "Running an office seems to be increasingly complex. What would you say are the major changes you've observed over the last few years? Have any of these changes affected practice operations?"
- g. "From our experience and research, there are many changes occurring in the medical industry (**be prepared to name a few from First Research.**) Have you had to make any adjustments in your practice as a result of any of these changes?"
- h. "Many of the office managers I work with are members of professional associations. Are you an active member of any groups?"
- i. "As you look down the road two or three years, do you see any changes on the horizon that could change the day-to-day operations of this office?"
- j. "Does the practice have any specialties? Do all the doctors work in the same field? (**If no**) What other specialties are represented?"
- k. "Tell me about the patients that make up your practice. Who is a typical patient?"
- l. "How many patients does the doctor(s) see in a typical year?"
- m. "Tell me about the types of services offered to patients at this practice."
- n. "What trends, if any, have you seen in the industry?"
- o. "Do you handle the day-to-day bookkeeping for the practice?"
- p. "What type of employee benefits does the practice offer? Do you feel that benefits offered are competitive with other physician practices?"
- q. "Explain how money flows through the practice — from the time the doctor sees a patient, bills for the service, and you write a check for the payables. Who touches the funds, what accounts are used, etc?"
- r. "Given some of the changes you're anticipating in the next few years, what elements of the day-to-day operations will change the most? (**Write down the changes.**) How will those changes affect your day-to-day work?"
- s. "Do you see any of those changes affecting the financial needs of the practice?"

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- t. “Which of these needs would you describe as the highest priority?”
 - u. “We would like to help with (**your highest priority.**) Here are some possible next steps.”
5. List two objections that you anticipate during this call. How will you address them?
- a. **“What is the purpose of today’s meeting? All financial decisions are made by the Doctor(s).”**
“I understand the Doctor(s) makes all the financial decision. Again, one of my primary objectives of this meeting is to get to know you and perhaps learn some of the issues you face on a daily basis. By learning about the key issues, I may be a resource for you and the practice either now or in the future.”
 - b. **“We have a good relationship with our current bank.”**
“Respecting that relationship, I’d still like to learn a little more about you and the practice. By learning more about you and the challenges you face managing this practice, there may be a way that I can be an additional resource for new ideas or simply a second opinion for you and the practice.”
6. What is your “next step” for this account? How will you ask for it?
- a. Follow-up on any personal or business need that comes out of the call.
 - b. If there is no immediate need, ask to meet again within three months to discuss future needs that came up in the call.