***IMPACT Insights #3: Meet***

The purpose of the IMPACT *Meet* step is to engage your prospect by building rapport and trust. You want your prospects to understand that you see the world the same way they do, and that you want what is best for them, and not what is best for you!

When first meeting with someone face-to-face, you only have 19 to 34 seconds to establish the credibility you need for that person to begin to believe you are trustworthy. If you position yourself well before going into the call, your trust factor will immediately be higher at the time of the appointment.

**There are several ways to establish trust before meeting with your prospect:**

* Help ensure that the agency’s reputation is positive by promoting the *Heartland* *Experience* and its *Service Essentials*.
* Ensure, to the best of your ability, that there are no outstanding customer concerns before calling on an account, or if there are, work to get them resolved.
* Make an appointment using the value to the customer in the request for the appointment.
* Confirm the appointment prior to making the sales call.
* Be on time but, don’t announce yourself more than 10 minutes before the appointment.
* Develop an internal advocate at the account who will put in a good word for you.

***Meet* Step Process:**

1. Provide a *Statement of Intention* which:
   * Explains why you are there and states that you will be asking questions.
   * Examples:
     + *The reason I am here to today is to find out a little more about your practice, ask you a few questions, and see how we might be of value. How does that sound?”*
     + *The reason I am here today is to find out a little more about your facility, ask you a few questions, and find out how we could be of additional service. How does that sound?”*
2. Provide an optional *Extra Credit Statement*, as applicable
   * Example: *“If together we find that there is something Heartland cannot help you with, we would be happy to recommend someone who can.”*
3. Obtain permission to take notes and ask questions
   * Example: *“Do you mind if I take a few notes so I have something to refer back to* OR *so I don’t forget anything?”*

Utilizing the *Meet* step effectively will help you to position yourself as a consultant, and advance the process of getting more eligible patients the care they want and deserve.

**Follow-up Ideas for the *Meet* step:**

* At an All-Staff Meeting
  + Discuss the agency’s reputation in the community, and ways to enhance it.
* In a Growth Meeting
  + Assign the ALs and CTNs/CTCs, as applicable, the following homework:
    - Confirm all appointments for the next week.
    - Report back at the next Growth Meeting how many appointments were actually confirmed, and the reaction of the referral sources to the confirmations.
  + Assign the ALs and CTNs/CTCs, as applicable, the following homework:
    - Identify an internal advocate at each of the top 10 accounts.
    - Report back at the next Growth Meeting.
      * The names of the 10 internal advocates or
      * The names of the actual and potential internal advocates, and 3 action steps for each potential advocate to turn them into true internal advocates..
  + Role play the *Meet* step for several
    - A brand new contacts/accounts
    - Contacts who are currently known but, not referring, referring very little or referring only one product line
  + Role play how to use the value to the customer in setting up an appointment for different referral source segments, i.e. hospitals, physicians, SNFs, ALFs
    - Examples:
      * *I would like to set an appointment with Dr. Jones to discuss how we may be able to help keep some of her patients out of the hospital.*
      * *I would like to set an appointment with your Director of Case Manager to explore how we can help her with the hospital’s recidivism (re-hospitalization) reduction initiatives.*
      * *I would like to set an appointment with your Executive Director to talk about how we may be able to help with occupancy and aging in place concerns, if any.*
  + Discuss what each member of the sales team has specifically done in the past week to increase credibility or value with their top 10 accounts.
  + Discuss agency reputation issues and brainstorm ways to address them, if any.
* When alone or during ride-alongs with a manager
  + Role play/practice out loud the *Statement of Intention* for each call ensuring there is something of value in the statement in the *Statement of Intention*.
* Follow-up with agency leadership on unresolved customer service issues in the territory and work together to fix.