



## STRATEGIES FOR A MEDICAL OFFICE “LUNCH AND LEARN”

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- Conducting an effective lunch and learn can grow your sales/referrals. They can provide a face to face interaction with the physician/provider, the nursing staff, and support people such as the referral coordinator, the clinic manager, social workers, receptionists and others who may be able to assist us in getting our message heard.
- Each physician’s clinic has its own policy or procedure here. Not all will allow them to be held. We must inquire if they do allow them and how a lunch and learn can be scheduled. The receptionist usually knows where the appointment schedule is – be sure to ask when, the starting time, and how much time is allotted, how many people will be there, confirm that this number includes the providers; ask about any special dietary considerations.
- Confirm each luncheon, and number of attendees a couple of days before the event – ask about recent menus and don’t repeat those. Try to be original, but not lavish.
- Develop a list of restaurants that can cater/deliver – Your time can get pinched because of traffic jams, etc. Order lunches that you have to personally pick up from restaurants that are close to the physician’s office – this cuts down on lost selling time.

- Bring sodas/drinks, plus a dessert. Allow for extra servings for yourself, your special guest, and big eaters at the clinic.
- It is better to dress up for these, as opposed to dressing down. Look professional, act professional, and be the best you can be – this may be your only opportunity this year.
- Your sales call goals are to discuss the clinical importance of hearing loss and the impact on the patient’s quality of life. Then describe your services, and the benefits that will accrue to the physician and the patient if we receive a patient referral. Finally, help the physician and nurse understand the process of a successful referral of a patient to your clinic. Provide copies of your clinic map, referral folders, business cards etc.
- This is your time to make friends, build trust, and make your sales presentations. They expect you to talk about your product or service, so come prepared with enough educational folders, CD presentations, literature and “give- aways”. You may get extra time with the doctors, but don’t be surprised if that doesn’t happen – go with the flow here.
- Try to eat before the providers get there. Make your presentation after you have eaten. Occasionally you wont have a chance to eat until everyone has gone, or not at all.
- Respect every one because you want all of them to be your allies/champions. Be gracious if the providers don’t have time to speak with you if they have to rush off to the hospital, do charts, make lunch time phone calls to patients etc. You always have to come back again, so don’t burn those bridges by getting peeved about poor attendance.

- Don't be grumpy to grumpy doctors! They may have been up all night with a sick patient, or lost the battle for someone who is dear to them. Come back another day, and they are usually fine when things are going better.
- Leave promptly after you have made your presentations, fulfilled all requests for samples, educational material etc. They need their private time with each other too.
- Reschedule your next lunch and learn – usually one a quarter is fine for your good customers; and ask for special consideration to reschedule if you have a new product, new service, or a new clinician you want to introduce to them.
- Lunch and learns break down barriers, both socially and professionally. Enjoy being there with them, for them, and your physician referral sales will grow because of it.

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