

solutionreach

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Shadow Paper

Introduction

Company Background

In 2000, Jim Higgins, the founder of Solutionreach, created a company called Communitect Inc. Communitect used SMS text messaging to connect banks to their customers. Solutionreach has always been an innovative company, staying one step ahead of the competition. When the banking industry took a turn for the worse in 2001, Higgins found an opportunity to move into the dental industry when his friend mentioned a problem with no-shows. The change into the dental field also came with a change in the company name; “Communitect” became “Smile Reminder.”

In 2007 Smile Reminder expanded their services to Optometrists, cosmetic surgeons, and dermatologists. SmileDash, their first online billing and scheduling program, was introduced in 2008. 2010 brought the integration of CareCredit, a leading healthcare credit card, with Smile Reminder’s patient data to create one easily accessible interface. With the outreach into so many different fields, Higgins decided to change the company name that best represented the company- “Solutionreach.” Today, Solutionreach is the first patient engagement service to offer a mobile app; this app allows patients to schedule appointments and pay on a device that is more convenient and comfortable to them.

Products Sold and to Whom

Solutionreach is a Patient Engagement company. Patient Engagement means closing the communication gap between service providers and their customers. Solutionreach helps medical offices (dentists, chiropractors, dermatologists, optometrists, cosmetic surgeons) reach their customers through many interfaces. Their whole goal is to make each patient feel like the only patient. Solutionreach has six main products:

1. PatientReach Tablet -This product is for all offices. The PatientReach Tablet helps with legibility, data fidelity, document shredding, and patient education.



2. PatientReach Mobile-This product is for all patients. This app has an easy to use, customizable interface that connects to the office social media site. Patients can make payments and appointments, or send pictures to their doctor all from their mobile device.
3. Patient Portal- Patient Portal includes many of the other services that the PatientReach Mobile and Tablet cover. Online bill payment, messaging, appointment scheduling, pictures and documents, are all included. The portal also includes archived newsletters and personal memo's the patients can send to themselves.
4. Enterprise Edition- Made for group practices, the Enterprise Edition allows for home offices to maintain a uniform, consistent brand for their customers no matter where they go.
5. Care Credit- For offices that accept Care Credit receive a special edition of Solutionreach to target specific Care Credit customers.
6. Eyemagination- Specifically for vision offices, Eyemagination creates simple ways to explain complicated issues to customers via animations, illustrations, and videos.

Background on Salesperson

I was able to be on sales calls with Jeff Crow. Jeff graduated in 2005 from the University of Utah with a degree in communications. The first 15 years of his career Jeff sold durable medical equipment. When he saw that the company he sold for was beginning to make some bad economic decisions, Jeff made a decision of his own to end his time there. The next four and a half years were spent in the medical software industry. Because of his medical background, Jeff was drawn to Solutionreach when he heard about openings in the company from his brother, who also works in the sales department. Jeff has been with Solutionreach for just over a year. He started out as an Account Development Representative calling potential leads for the Inside Sales team to present the product to. Because he performed so well, Jeff was promoted to the Inside Sales Team; he regularly holds the number one position on the

sales board. He said it's usually a fun competition between him and his brother Scott for the top two positions.

I asked Jeff what he liked most about working for Solutionreach. His response was the great sense of community and family. Most of the employees had friends or family that worked on the same sales floor. Jeff explained that they were more like a big family than co-workers. They had fun together, but also supported one another to reach their goals and become better.

Product Knowledge and Selling Skills Needed

Jeff had close to twenty previous years of selling in the medical field. However, his brother Scott had no experience in sales, let alone in the medical field, when he was hired. As I talked to multiple people on the sales floor, most of the employees had no previous experience or product knowledge. Once hired, each new employee was trained for three weeks. The training consisted of learning how to use Salesforce and about the software that they sell. The sales reps are not trained on techniques, only the sales presentation.

While no particular skills were necessary to be hired, tenacity and resilience were common traits that had been acquired on the job. Each employee was in control of how many calls they made, how much time they actually put into cultivating relationships. Jeff had great tenacity and resilience. He was determined to do his best, be on the top of the sales board, make more sales than he had the previous day. For being so determined, Jeff was also very resilient. Instead of kicking himself on the days when a sale wasn't closed, or he didn't make as many sells as he would have liked, he kept working hard.

Sales Calls

Strengths and Weaknesses of Selling Presentations

Jeff made several phone calls while I was there. Not everyone answered, so he left a lot of messages. One call in particular really helped me to see get an insight on the Solutionreach



sales model. The call was to Heather and Tiffany, the manager and receptionist of an optometry office; the purpose of this call was to do an online demonstration of how the Solutionreach patient engagement software works, and how they can customize it to fit their needs. Heather and Tiffany had previously discussed their interest in the product with Jeff; they just needed to get the approval from the doctor

Strengths

On the call with Heather and Tiffany, the optometry office, Jeff began with a strong reframe of what they had discussed in previous exchanges; including the benefits the secretary had to look forward to, service that none of their competitors could provide, and statistics as proof to back up his claims. He knew that the office currently used Demandforce, another patient engagement company; therefore, he explained that Solutionreach did everything that Demandforce did, plus some.

Jeff had taken the time to ask how the day was going at the optometry office, so he knew that it was a busy day for them. With this knowledge, he was able to point out some of the benefits of Solutionreach that would take away some of the current stresses they were dealing with. For example, the receptionist still had dozens of calls to make to patients about upcoming appointments. Jeff pointed out with Solutionreach the reminders could be sent to the patient via their preferred way of communication automatically, preserving time.

Not having ever met Heather and Tiffany, Jeff did a great job with catering to different social styles over the phone. These two women were both high energy, so he increased his level to keep pace with them. They made jokes back and forth and even shared “air-fives” when they discussed things that the optometrist office really liked.

Weaknesses

With the call to the optometry office, Jeff knew that they office manager still needed to get approval from the doctor before they would be able to move forward. However, he did not

schedule an appointment with the doctor, ask to talk to the doctor, or even ask what the doctor's opinion about Solutionreach was. Luckily, Heather and Tiffany mentioned at the beginning of the call that the doctor had left the decision up to them about buying the new software; once those two decided on a product, the doctor would just sign the paper for approval.

Another play Jeff could have improved was the permission play. He knew the office was very busy and that he would be on a time constraint. He knew that the presentation would take about an hour, but he failed to mention that with Heather and Tiffany. They were worried about the internet repairman coming. If Jeff had given them an actual time frame, that would have helped calm their anxiousness a little more.

Nonverbal Communication

This was an online, telephone call. Jeff was in his office in Utah, while Heather and Tiffany were in a different time zone. Jeff called them on the phone, and enabled online screen sharing so he could demonstrate how the Solutionreach patient engagement software works. He was very comfortable when talking to them though. He would lean back in his seat, talk with his hands, and make facial expressions. I was able to see how these things helped Jeff to stay calm when presented with objections or when he felt he did well on a topic that Heather and Tiffany really liked.

Solutionreach came up with the slides that the sales reps use when making presentations. Jeff didn't have any control over those, but they were very well formatted and easy to look at. There wasn't too much information. He had obviously put in the time to learn the slides though, and knew exactly when to switch to the next one to help the presentation move smoothly.

Objection Handling

Originally, the optometry office said that they were really busy; they wanted to talk to Jeff, but had the internet repairman coming 'really soon'. After asking some questions, Jeff discovered that they had an hour before the repairman came. He assured them that his presentation would be over before then, and explained that the sooner he showed them the presentation, the sooner he would be able to help them implement the software in their office. They agreed to go through the demonstration at that time.

Jeff did a great job at avoiding as many objections as possible throughout the presentation. During the call Heather mentioned that she liked how her current software allowed her to have customer reviews posted on their website and didn't want to lose those reviews. In response, Jeff taught them how to download those reviews from the other software and integrate it into the new Solutionreach software. Once he taught them how to save those reviews, Heather said, "Well if you do that for us too then I guess there's no need for them (Demandforce software) anymore."

Closing and Asking for the Order

Right as Jeff was finishing with his last slide, Heather mentioned that the repairman had just arrived. She mentioned that they liked the product and would email Jeff soon, but that they had to go at the moment. Jeff asked, "Should I keep an eye out for the form today?" The response was that they would most likely get to it tomorrow morning before the patients started coming in. He said he would contact them the next morning around ten if he still hadn't received the form.

In preparation for the meeting, Jeff had emailed the office a pre-filled registration form to get the signed up for Solutionreach patient engagement systems. He explained this to them, so they quickly looked at their inbox and saw it. Jeff explained that all they had to do was have the doctor electronically sign the form and send it back. In the mean time, Jeff told them that



he would go ahead and get the process started so tomorrow when they emailed back the form, a representative would already be scheduled to help them install the program.

The sale was not closed while I was there, but Jeff did a great job of scheduling the next event and setting the expectations of moving forward with the sale.

Maintaining Relationships with Customers

The relationships at this stage in the sales model is 'quick term', as Jeff put it. The sale cycle is fast; a sale usually takes no longer than one month. If the medical office doesn't want to work with Solutionreach at the moment, a note is written in Salesforce, and the sales rep will return to them at either a set time or a few months later.

While in the middle of a sale, Jeff explained that it is very important to be on time to appointments. They are all on the phone, so if you are late at all the office might think that you forgot or that you don't value their time. He always tries to make them feel as important as possible. It is also important to never bash competitors. Jeff makes comparisons to competitors, but doesn't bash them. First, it's unprofessional; and second, most of the offices he sells to already have those competitive software, and he doesn't want them to feel like they have made terrible decisions. Instead he wants them to feel confident that they can make right decisions.

Buyer Interview

I was unable to get in contact with a buyer from Solutionreach. Instead I interviewed Nate Julian, a USU alumnus. He graduated with a degree in marketing in 2013. Nate has worked at Al's Sporting Goods as the Clothing Buyer/ Department Head since 2010.

Why buy from one Company rather than another?

When thinking about what products to buy, Nate really wants something that will turnover inventory quickly. Knowing what sells the best isn't always the easiest thing to know unless you have tried selling the product. Usually Nate will buy eight different products from one brand, put it on the floor, see how well it sells, and then only reorder the products that sold the best.

Nate mentioned that Al's has been around for a long time, since 1921. They have strong relationships with certain brands and sales reps. He knows that they will always buy from those particular reps, just because of the loyal relationship that has previously existed between the two brand names.

What are the Main Benefits they look for when buying?

The number one benefit is the ease of working with the brand. When orders and reorders are easy for Nate, he actually enjoys doing business with them. I was given two examples of brands that Al's buys from. Brand A is loved by every customer that walks in the door; they actually walk in the door looking for Brand A. This is great for Al's, the brand is expensive, but people keep buying it, which helps revenue increase. However, Brand A is a pain to work with for Nate. The reorder paperwork takes a long time to fill out, the sales rep isn't the easiest to get a hold of, and sometimes the actual product shows up later than it was supposed to.

Brand B, on the other hand, makes Nate's life a piece of cake. They walked through the initial paperwork with him to make sure they had all of the correct information. Now, whenever he wants a reorder, he just tells them and they do the paperwork for him. And when he wants new products, they help him decide which products will work the best for the demographic of customers here in Logan; and of course, do the paperwork for him.

How does the Salesperson influence their Decision?

The greatest way that a salesperson influences Nate is by helping him pick out which products to put on the floor. There are thousands of pieces to choose from, but most of the time he just has the room and budget enough for six to eight pieces. When the sales rep has done their homework by looking at what styles and prices sell the best in the area, Nate finds that he is more willing to buy from that sales rep.

Discounts work very well with helping Nate decide how many products he will carry. The higher the discount, the more likely he is to carry it. Unless it has proven not to sell well, and that is the reason it has such a high discount.

What makes a Good, Bad, and Ugly Salesperson?

A good salesperson is described the same way as the type of salesperson that can influence Nate's decision: knowledgeable about the AI's Sporting Goods in particular. A good salesperson is able to present solutions to problems, treats Nate well by helping with paperwork, and is easily accessible.

Nate's experience is that a bad salesperson is one that doesn't follow up. They say that they will do something, but never follows through with it. This usually happened in the past when the salesperson had too much of a load to handle, and AI's wasn't their top priority. Either that or the salesperson was not paid on commission, so they had less of an incentive to have a good buyer-seller relationship.

An ugly salesperson completely ignores the goals of AI's Sporting Goods and tries to push unneeded products onto AI's floor space. Nate absolutely won't work with anybody that is selfish; who shows only the highest priced products because he wants a higher commission. There is a lack of respect and loyalty in those sales people, and AI's Sporting Goods won't have anything to do with them.

Summary

Main Takeaways

From this job shadow experience I have gained some great insights. I realized for the first time the actual value of a job-shadow. Also, I learned that sometimes the job environment is worth more than the pay. Lastly, I came to understand the importance of actually caring about people besides myself.

The Value of a Job Shadow

Before this assignment, I honestly didn't realize that I could just ask to follow someone at work one day. Sure, I had heard of 'bring your kid to work day'. My brother-in-law had to follow other doctors around for a couple of years before he could become an actual doctor all on his own. Outside of those experiences, I hadn't thought of watching someone at work to see if it was something I actually liked or not. I haven't gone on any other job shadows yet, but I have asked a few people who I feel I could gain perspective and experience from.

This has helped me learn how to sell myself. Instead of underselling who I am and what I can do, I have learned that I need to oversell. Jeff said that when he first started selling, and even when he first started at Solutionreach, he was nervous every time he got on the phone because he didn't want to mess up. But because he worked through the fear, he is now a top sales rep and loves what he does. I can do the same with my fear of going into interviews. The more often I do it, the easier and less scary it will become for me. My fear of asking people if I can follow them around for a day hasn't gone away yet, but I know that the insight I can gain from shadowing is well worth the twenty seconds of torture as I ask.

Environment vs. Pay

Jeff really loves his job. His brother Scott loved his job. Kara and Josh, other employees of Solutionreach, said that they love going to work every day, too. Jeff mentioned that he left a

company where he was paid more, but wasn't nearly as happy to come to Solutionreach. The feeling of family and community were strong among the sales floor and from the sounds of it, the rest of the Solutionreach employees as well. A friend of mine works for Solutionreach on a completely different team, in a different building than the sales team works in. But because I was a friend of an employee they were happy to have me come. I was welcomed warmly and made to feel at home, just like the rest of the sales representatives. Jeff mentioned that sometimes it's hard being rejected so many times in one day as a sales rep, but having a 'family' so close to turn to really helped him to perform better in the end.

I know that one day I will have to decide between different job positions with different companies. Now I know that I will need to consider more than just the pay and the location. I will also consider the values of the company, what they stand for, and how my values fit in with the company.

Care about People besides Myself

College is a very selfish time of life. I go to school to improve my mind, to be able to help my career, so one day I can live a comfortable life. In the sales realm of my life though, I get the chance to help somebody else. The salesman and the buyer are able to work together to achieve a mutual benefit. I enjoyed listening to Nate Julian in particular as he talked about the relationships he has with some of the salesman he works with. He mentioned that he wouldn't normally buy as much product from a particular brand, but because of the close relationship with the sales rep, he buys those extra products. But he also knows that the sales rep helps him out as often as possible with discounts and expert product knowledge. Sales is a very rewarding, unselfish career.

The Griffin Hill Integrity Sales System that we have learned in class is all about catering to the needs of others. My job as a salesperson is to listen to the buyer and figure out how I can help to solve their problems. Even the solution presentation, the one part where we don't ask many questions, is all for the benefit of the buyer. I enjoy selling benefits; it helps people.