**PRE-CALL PLANNING**

**Develop a Pre-Call Planning Strategy and Initial Contact:**

1. **Building Rapport**
   1. Initial Meeting - creating a positive first impression - humility and service, “what can I learn” not “what I know” mentality.
2. **Uncovering Mutual Benefits and Building Trust**
   1. Asking questions, tailoring the conversation, understanding their needs first. Discovery phase - understanding their org chart, their clinical product and the appropriate outbound referrals and payers.
   2. Consider how long you can ask questions before talking about your offering/facility - you will be able to talk about product through the back and forth Q&A.
3. **Discovering Differentiators**
   1. Finding ways that both parties will benefit from the partnership, using success stories, offering to help fill needs.
4. **Engaging Other Team Members from Both Facilities**
   1. Making formal introductions, setting up group meetings and tours, leading conference calls, creating engagement, consistent communication, establishing referral system, bringing additional value and good support.