



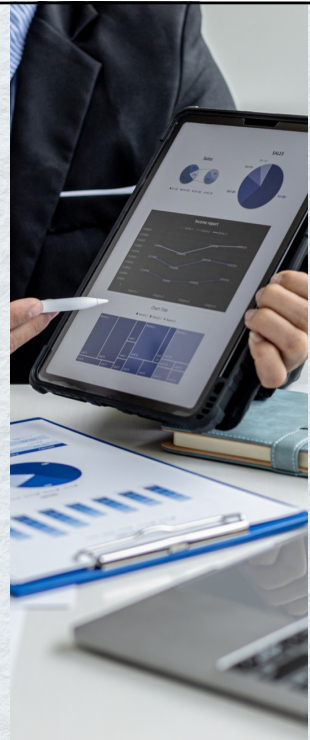
Sales Momentum: Building High Performing Referral Teams

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INTRODUCTION

Sales success is engineered, not accidental. Most salespeople fail not from lack of effort, but lack of a system.

Today, we break down what actually drives sustainable performance: **disciplined planning, the right call volume, deep product and community knowledge, genuine empathy, and the confidence to ask for business.** Backed by strong leadership and clear success metrics, these are the practical drivers that turn an average sales team into an exceptional one.





HAVING THE WEEK PLANNED OUT

- Salespeople default to **Jellyfishing; going with the flow with no real plan**
- Jellyfishing means a general idea, maybe one client, no structured approach
- Results in reactive, ineffective marketing
- **Solution:** Map territory geographically and assign specific areas per day
- Pre-determine whom to visit and what to discuss in each office



MAKING THE RIGHT NUMBER OF CALLS

- Sales is a numbers game, and consistent call volume creates predictable outcomes
- The Funnel: Calls lead to Conversations of Consequence, which lead to Referrals, which lead to Sales
- **Minimum standard: 15 in-person calls per day**
 - **Minimum is the floor, not the ceiling**
 - **Hitting 15 is not permission to stop for the day**
- Achievable only when backed by solid planning from Slide 2



ELIMINATING WINDSHIELD TIME

- Windshield time is one of the biggest daily time drains for sales teams
- Most windshield time is avoidable with the right approach
- **Solutions:**
 - Thoughtful territory planning reduces unnecessary driving
 - Use Waze or other GPS tools to navigate traffic intelligently
 - Know your market and anticipate when and where delays occur

UNDERSTANDING THE PRODUCT

- Reps often only know the basics, such as ADLs, Medication Management, and Skilled Nursing
- Deeper knowledge required:

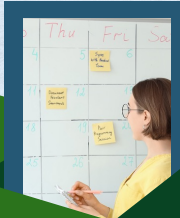
ABILITY TO PAINT THE PICTURE OF THE PERFECT REFERRAL



ASK REFERRAL SOURCES FOR A SPECIFIC TYPE OF PATIENT



BUILD THIS SPECIFICITY INTO THE WEEKLY PLAN





UNDERSTANDING THE COMMUNITY THEY SERVE

- Goes beyond seniors needing care
- Includes the physical community as a whole
- Identify **all individuals and organizations** serving the **same target audience**
- **Connect the dots between people, places, and resources**
- A rep with this insight becomes a Go-To resource in the service area



KNOWING THE PATIENT'S HEALTH CYCLE

- Helps reps identify and describe exactly who should be referred
- Removes guesswork from the referral conversation
- **Shift in language example:**
 - **Weak:** If you have a referral, please call us.
 - **Strong:** Do you have a patient who just started on a Dexcom CGM and seems confused about their new diabetic diagnosis?



WILLINGNESS TO LEARN, ESPECIALLY FROM CLIENTS

- Listening is the foundation of effective sales
- Cannot provide a solution without first understanding the need
- **Key behaviors:**
 - **Absorb feedback from clients and referral sources**
 - **Blend existing knowledge with new ideas**
 - **Remain coachable and open to leadership guidance**



HAVING EMPATHY

- Empathy creates genuine human connection in an increasingly digital world
- **What empathy enables:**
 - **Hearing the patient's life story**
 - **Understanding the challenges referral sources face**
 - **Building trust through authentic relationship development**
- Trust indicator: when clients begin sharing personally, trust is forming

HAVING A DEDICATED SALES OVERSEER

- The sales leader is the coach and arguably the most critical piece of the structure
- **Responsibilities:**
 - Holds reps accountable
 - Strategizes around account lists
 - Monitors call quality and objectives
 - Assists with pre-call planning and next steps
 - Removes roadblocks
 - Supports reps emotionally after difficult days
- **Common mistake: Assigning sales oversight to an administrator or operations leader**
 - One role will always take precedence over the other



ASKING FOR BUSINESS

- Most overlooked and most common failure point in sales
- Reps build relationships but never make a direct ask
- **Effective ask examples:**
 - **Do you have a patient I can assist with?**
 - **Is anyone being discharged today that you feel is at a high fall risk or at risk of readmission?**
- Painting the picture of the ideal patient makes it easier for the referral source to spot the right candidate



SALES IS NOT ABOUT DONUTS AND LUNCHES

- Food and gifts create the wrong value proposition
- **What happens in practice:**
 - The rep becomes the donut person, not a trusted partner
 - Offices requiring lunch to allow visits rarely convert to referrals
- **Correct use of gifts and food:**
 - A reward AFTER a referral, not a bribe to obtain one

KNOWING WHAT SUCCESS LOOKS LIKE

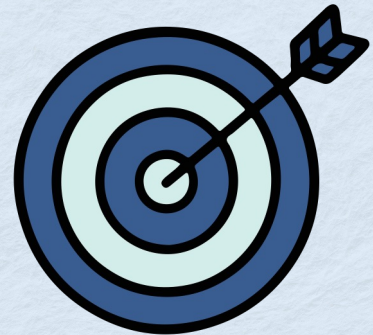
- **Reps cannot perform to a standard they do not know**
- Managers often set vague goals with no timeline or milestones
- **Recommended approach:**
 - Be specific from day one
 - Tie success to a measurable formula: Goal equals billing 3 times the monthly salary
 - Clear, trackable, and accounts for all case size variations
 - Once the first goal is met, introduce new metrics for continued growth



ENGINEERING SALES PRODUCTIVITY

- Disciplined planning of time, territory, and call volume
- Deep knowledge of the product, community, and patient lifecycle
- Human skills including empathy, listening, and relationship-building
- Accountability structures with dedicated leadership and defined success metrics
- Directness and always asking for the business
- Avoiding performance traps, including food bribes, jellyfishing, and excessive windshield time

Sales team productivity is engineered, not accidental. Top performers combine structure with authenticity, and great sales cultures back that up with coaching, clarity, and consistent standards.



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