

First Contact:
Making and Keeping Your
Professional Contacts,
Or Things They Never Taught You in
Medical School
-But Perhaps Should Have



*Debra A. Smith, DO, MIHM, MBA, FACPM, FAOCOPM,
CHCQM, CIME, MRO*

As presented at the CIOMEA's Ambassador Training Program,
AOA Convention in San Francisco, CA, November 10, 2004

First Contact: Making and Keeping your Professional Contacts* *or* Things They Never Taught You in Medical School – But Perhaps Should Have

I wish I could tell you there was some great secret to unlock all the doors for you, but there are some things you can do to greatly improve the effectiveness of your efforts. And when we're done perhaps you could share a few helpful hints with me as well.

Let's get started –

One of the first instructions I received during orientation my first day in business school was to have business cards made up *-the nicest you can afford*. This is one area in which physicians notoriously fall short; it is a *fatal flaw*. Remember - these instructions are given to graduate students, where money is at a premium. Yet, this is not the time to get *cheap or homemade*. Your cards are a tangible representation of you, be professional. Have a stocked card case with you or within easy access of where you are at all times – that means at home, at the office, in your glove compartment, in your locker at the gym, etc. Have them with you anytime you are going to a staff meeting or medical society meeting. And certainly, anytime you are going to a convention or international seminar, a stack of cards should be in your suitcase to replenish your card case. If you have forgotten them, have your office overnight them to you – it's that important.

Bottom line - You never know when you are going to meet someone that you are going to want to speak with further. Suppose you see a friend or acquaintance out playing golf or in a restaurant, who calls you over, and lo and behold, your friend is there with Bill Gates and they are having a discussion about healthcare! Suppose you have a project you need funded that would really be of interest to his Foundation. You ask for his card as you pull out your case and hand him a fresh, crisp card. While it may be ok for him to pull out a grubby little wrinkled card with pocket fuzz stuck to the edges; it is not ok for you. If he doesn't have a card on his person, take out an extra card, turn it over and have him write down his contact information, so you have it. To have opportunity knock is rare, but it virtually never knocks twice – make certain you *open the door and keep it open*. That means get back with him immediately, don't let more than a week pass by before you have gotten back with him about the topic you had been discussing. Be gracious in your email or follow-up call and begin by reintroducing yourself and briefly give the person the circumstances in which you first met. As you well know, there is nothing more frustrating than talking to someone who looks familiar and obviously knows you, but you can't remember who they are. Don't expect folks to remember your name, where or when they met you and for goodness sake don't make them grasp for it with that line - "Do you remember me?"

You may wish to have personal cards as well as business cards. You may give out one or both depending on the appropriateness of the occasion. You may wish to have both sides printed on, depending on use. If you are operating in another country or are planning on operations in another country, you may wish to have your name and title and name of company/organization in the language of the country in which you are working, particularly, if it is in another alphabet.

*As delivered at the Ambassador's Training Seminar, AOA Convention in San Francisco, CA November 10, 2004 © 2004 Debra A. Smith DO, MIHM, MBA, FACPM, FAOCOPM, CHCQM, CIME, MRO

This work may be freely reproduced or cited for educational or instructional purposes, as long as proper acknowledgement is given to the author.

How do I find these contacts?

Do your homework – check out directories, conference brochures, news releases and articles and annual reports. Many of these can be found online. Take advantage of conventions and conferences – meet and greet the speakers of particular interest. Don't start into a major dissertation with them at that time, as there are no doubt others waiting to speak with them as well. Instead ask for their card to contact them later, briefly mention why, exchange cards and give them a call in a day or two. Equally as important, if not more so, are your fellow audience members. Obviously they are attending this particular meeting because they share an interest in the topic being presented. You are in a roomful of opportunity. This is no time to be a wallflower! Put on a smile and introduce yourself. "Press the flesh" as they say in politics. Find out why folks are there, what their interest is in the topic and what bit of knowledge they are hoping to gain from the experience. For heaven's sake, don't interrogate them, but approach them in a gentle, friendly manner and *really listen*. Jot down a note or two on the back of their card, when you have a private moment. Who knows, you may be able to connect them with another audience member who is just the person the need to meet. Your networking should benefit *more* than just you and your agenda. If you approach it this way, you will get over any shyness - you have a higher purpose. Keep in mind what Emerson said, "That which you persist in doing becomes easier to do. Not that the nature of the thing itself has changed, but that your ability to do it has increased!" Allow yourself to be a conduit, as well as a repository, of information. Remember, the human mind is still the greatest computer of all – always be looking for win-win matches for the people you know.

Due diligence

Suppose you have set up that meeting with the person you wanted to meet – do more than just show up and attempt to wing it. Do your homework, and prep for the meeting. Use the same due diligence you would in training, reading up on a surgical procedure before meeting your attending for the next morning's case. Use the Internet and run a search on that person. Search the company or organizational web-site. Read everything you can about them, their interests and research activities, etc. Learn who they are so you can tailor your approach accordingly.

Anticipate the materials and supporting documentation you may need, so as to have it on hand. You may or may not use it, have it ready to go. Good items may be "What is a DO?" "Osteopathic Medicine," the "DO Factsheet," etc. as well as any meeting specific materials i.e. a summary of ongoing research projects/ new projects, etc, that you may discuss. As an aside – Completely and thoroughly read, NOT SCAN, the literature/information that you are bringing with you. No matter that your boss, CEO, and 5 other departments have signed off on it, and it is now printed on glossy paper with full color graphics, you may still find that it contains material that may be considered somewhat hostile, contentious and even downright offensive. Since I believe in vicarious learning, learn from my mistakes. Remember – *it's your reputation on the line*.

Personally, I find a zippered portfolio works best for these materials, to hold files and appropriate supplemental information. In addition, it provides a place for business cards, pens and breath mints; it also rids one of the need of a wallet or purse, as there is a pocket for your credit card, license and cash.

*As delivered at the Ambassador's Training Seminar, AOA Convention in San Francisco, CA November 10,2004 © 2004 Debra A. Smith DO, MIHM, MBA, FACPM, FAOCOPM, CHCQM, CIME, MRO

This work may be freely reproduced or cited for educational or instructional purposes, as long as proper acknowledgement is given to the author.

Now what?

Start with what you know: What are you there for?

Ask yourself what you are trying to accomplish and why. Be able to *state it clearly in one paragraph* – not a doctoral dissertation. Write it out, rewrite it – read it aloud to yourself enough times that the concepts gel in your mind and you are able clearly and succinctly state them.

Who are you?

This is among the first things people will ask. *Don't give a dead-end answer*, e.g. I'm an internist from Ohio. This is really a variation of what makes you special and why should I be interested in you or anything you have to say. Let them know who you are representing, (even if it is yourself), in what capacity and why. Let them know who you are, your professional standing (president of state medical society/ board of trustees of my specialty college), additional degrees, where you are on faculty (This information is tremendously important overseas). I am sure you can think of more examples, as they pertain to you. Be able to *summarize it in a paragraph*. Be very *matter of fact* about it; it's not bragging – it's just who you are.

Get to know them

Get to know the person you are meeting. You have done your homework. However, this is NOT the time to show off to them how much you know about them – lest they feel stalked. Now, be prepared to set aside everything you thought you knew. *Assume nothing*. That may seem entirely contradictory to everything I have been saying, but you'll see why in a minute. Ask them about their interests, research, their department and organizational goals. Really listen, soak up what they tell you. Don't be a Rhett Butler. Give a damn about them. There's far more to people's interests and personalities that any biography on a web-site will ever tell you. *Be genuine*, don't be a user. Don't drop them or ignore them the next time you see them because you think you have gotten all you can from them. Shallow as it is, it happens – but *you* won't be one of those people. Instead, *look for a way to help them out*, even if it doesn't benefit you. This is the time to pay it forward.

And now some general comments:

Endeavor to become a well-rounded person; it is not enough to be *just* a great doctor. This becomes especially evident abroad. Unlike in the US where anyone with the grades and determination can become a physician; overseas, physicians tend to come from the socially elite classes. Knowledge about art, music, literature, history and current events is part of the social norm of any well-educated person – as are good manners. Read a copy of Emily Post; at least know what constitutes good manners in your country. [If you're like me, you may find it rather enlightening, as manners change over time.] And chances are you will not be terribly far off

*As delivered at the Ambassador's Training Seminar, AOA Convention in San Francisco, CA November 10, 2004 © 2004 Debra A. Smith DO, MIHM, MBA, FACPM, FAOCOPM, CHCQM, CIME, MRO

This work may be freely reproduced or cited for educational or instructional purposes, as long as proper acknowledgement is given to the author.

elsewhere – or at least your behavior will be understood as *correct for your culture*. Read up on the culture and history of the nationality of the person or country you are going to meet, as well as what is or is not culturally acceptable. I recommend Roger Axtell's, *Do's and Taboos Around the World*. For example, not everyone "does lunch". In some cultures, it is considered a bribe. Break the American stereotypes of people who are loud, brassy, pushy, rushed, on a tight schedule, and generally rather self-absorbed. Instead be calm, friendly and cordial, but *never* naive. Keep your eyes and ears open – learn to pick up on the undercurrents. Understand that there may be limits to what an organization's officials may say publicly. On the other hand, realize *your* cultural background may bias your reading of the direction of those currents. As an aside at this point, while nearly all physicians think they read people well, 99.999% of those don't. I recommend a book entitled *Reading People*, by Dr. Jo-Ellan Dimitrius; she has helped pick juries in some of the most high profile cases in the last 15 years or so. Back to our discussion today - If someone is giving you particularly mixed signals on a situation, *directly ask them*. They still might not tell you, but they may make it considerably clearer. Don't risk a misunderstanding. Done politely, they will understand – after all, you are an American.

This is the time when it is convenient to be an American, use the stereotypes to your advantage. There is still some novelty in dealing with Americans. Don't let yourself get sidetracked. This is particularly true when dealing with folks from the Former Soviet Union, where if one asks a question, you will get a 2-hour monologue of facts and figures – none of it particularly useful or relevant. Typically, Westerners are a bit glazed over by then, daring not to ask another question, and happy to leave by that point. You will often find similar types of individuals have made their way into international organizations. If after a reasonable amount of time, you see that you are really no closer to getting the answer to your original question, use that American frankness – raise a hand slightly and very politely interrupt and directly ask what you want to know. Be nice about it, knowing that it may take a few redirects.

Do make certain you accomplish what you came for by the end of your encounter, *even* if it is the last thing you discuss. *And it very often may be the last thing*. It is understood that Americans always have some sort of agenda for a meeting. Now you know one another as people and you are more likely to get the inside scoop on what you came for and who else might be helpful for you to contact as well.

The Follow-up

Always follow up in a day or two with an email or a note card. Email is best when you are on an extended trip. Otherwise get yourself some nice note cards and hand write a short note. Two or three sentences thanking them and following up on some piece of the meeting i.e. who you called if they recommended someone or that you will be sending them additional info under separate cover. Enclose another business card – just so they have your contact information at hand. Set up the appropriate follow-up meetings. *Don't let things fall through the cracks*. [Frankly, this is challenging for everyone, nevertheless, it is vital.]

Keep your Rolodex up-to-date – both real and virtual. Virtual is particularly helpful while on the road, but should something happen to your laptop, palm pilot, etc – you might find yourself up the proverbial creek. A real Rolodex is important because you will have imprinted that person in

*As delivered at the Ambassador's Training Seminar, AOA Convention in San Francisco, CA November 10,2004 © 2004 Debra A. Smith DO, MIHM, MBA, FACPM, FAOCOPM, CHCQM, CIME, MRO

This work may be freely reproduced or cited for educational or instructional purposes, as long as proper acknowledgement is given to the author.

your mind when you exchanged cards. You may also have reminder notes to yourself on the back.

Keep in contact with people at least once a year. Christmas, New Years and holiday cards are a great way to do so. Go to an office supply store and get yourself some good-looking foil lined cards. Use your virtual Rolodex to print out the address labels. Jot a line or two inside – i.e. so nice to have met you at ... or are you going to again this year...see you there – and sign your name. Put your business/personal card inside, it is a good memory prompt. People are more mobile than ever, *be easy to find*. Start work on your cards about this time of year to get finished. Sure it will cost you a good two dollars or more for the card and overseas postage, but think of it as an investment to keep the lines of communication open. So few people send cards, even to loved ones and family, you will stand out. Incidentally, you shouldn't forget friends and family either, in most of the rest of the world they constitute your very best contacts. Besides, what that saying about "six degrees of separation?" This is another time for you to play matchmaker with your contact list, as you will have met more people. It is very easy at this time to let a person know you have thought of someone for that project they are working on. Tell them you will give them a call *and do!* Be generous with the knowledge you have gained during the year.

What I have outlined today is not so much a method, as a way of life. *It will cost you something* – in terms of time, money and surely effort. There are no shortcuts I know of. You must choose to care. It is not all about you. The people you will be meeting are bright; they can spot a phony. Be the real thing. Look to create win-win situations. What you sow you will reap. It's always good to keep this in mind when dealing with people:

Do not judge and you will not be judged. Do not condemn and you will not be condemned. Forgive and you will be forgiven. Give and it will be given unto you. A good measure, pressed down, shaken together and running over, will be poured into your lap. For with the measure you use, it will be measured to you.

Luke 6:37-38.

So be generous with others. And always, always remember people who have been good to *you and honor them*. - Don't forget. –

Perhaps the best advice is still the Golden Rule:

Do unto others as you would have them do unto you.

Luke 6:31

In today's world, this is a rare find. Be that treasure trove.

Those here today can do a world of good for the osteopathic profession.

Never doubt that a small group of thoughtful, committed citizens can change the world. Indeed, it is the only thing that ever has.

Margaret Mead

**As delivered at the Ambassador's Training Seminar, AOA Convention in San Francisco, CA November 10,2004 © 2004 Debra A. Smith DO, MIHM, MBA, FACPM, FAOCOPM, CHCQM, CIME, MRO*

This work may be freely reproduced or cited for educational or instructional purposes, as long as proper acknowledgement is given to the author.

**First Contact: Making and Keeping your Professional Contacts* Things
They Never Taught You in Medical School
– But Perhaps Should Have**

Helpful Reading

Emily Post's Etiquette, by Peggy Post; Harper Resource; 17th edition (November 1, 2004) ISBN: 0066209579

Miss Manners' Guide for the Turn-of-the-Millennium, by Judith Martin; Fireside; Fireside edition (November 15, 1990) ISBN: 067172228X

The Do's and Taboos of Hosting International Visitors, by Roger E. Axtell; Wiley; (March 1990) ISBN: 0471515701

Do's and Taboos Around the World, by Roger E. Axtell (Editor); Wiley; 3 edition (June 1993) ISBN: 0471595284

Kiss, Bow or Shake Hands: How to do Business in 60 Countries, by Terri Morrison, Wayne A. Conaway, George A. Borden, Hans Koehler; Diane Pub Co; Reprint edition (June 1, 2000) ASIN: 0788192272

Do's and Taboos Around the World for Women in Business, by Roger E. Axtell, Tami Briggs, Margaret Corcoran, Mary Beth Lamb; Wiley; 1 edition (March 18, 1997) ISBN: 0471143642

Medicine & Culture: Varieties of Treatment in the United States, England, West Germany, and France, by Lynn Payer; Owl Books (NY); Reprint edition (October 1, 1996) ISBN: 0805048030

How To Win Friends and Influence People, by Dale Carnegie; Pocket; (September 2, 1982) ISBN: 067146311X [Don't get the revised & updated version of this – the original is a classic!]

How to Work a Room: The Ultimate Guide to Savvy Socializing in Person and Online, by Susan RoAne; Harper Resource; Fully Rev. edition (December 2000) ISBN: 0060957859; [Get the Audio Cassette] (Don't misunderstand and be put off by its title; it is not at all a book on manipulating others.)

Reading People, by JoEllan Dimitrius PhD & Mark Mazzarella; Ballantine Publishing; (June 1999) ISBN: 0-345-42587-1

Linked: How Everything is Connected to Everything Else and What It Means, by Albert-Laszlo Barabasi; Plume Books; Reissue edition (April 1, 2003) ISBN: 0452284392

Check out your local library's books-on-tape selection, there are many similar excellent resources you can use to better yourself during your daily commute – and they are *free*!

***For the greatest personal improvement, consider finding a local Toastmasters affiliate and truly learn how to present yourself well. www.toastmasters.org

**As delivered at the Ambassador's Training Seminar, AOA Convention in San Francisco, CA November 10, 2004 © 2004 Debra A. Smith DO, MIHM, MBA, FACPM, FAOCOPM, CHCQM, CIME, MRO*

This work may be freely reproduced or cited for educational or instructional purposes, as long as proper acknowledgement is given to the author.