



5 PHONE TRENDS

DICTATING NEW AND EXISTING

PATIENT APPOINTMENT OUTCOMES



Connecting a patient's call is the first step in that patient's appointment journey. It is a vital step to make sure each patient's call is connected to someone in your practice who can help. However, many practices recognize their roadblock isn't connecting calls, but later down the line in the patient's experience. You're getting ear to ear with an overwhelming number of patients, but you aren't seeing a boost in appointments at your practice. *Where is your practice dropping the ball? Patients are calling in need of an appointment, so why aren't they scheduling?*

In this **FREE** data study, you will discover:

- Common trends practices see that affect their appointment conversion rates for new and existing patients
- Top reasons for appointments not being booked
- Actionable tips to improve your practice's appointment conversion rates
- Why you need to focus on each step in the patient's phone experience

THE 5 TRENDS AFFECTING YOUR PRACTICE'S NEW AND EXISTING PATIENT APPOINTMENTS BOOKED

03

TREND 1

Consistent Rate of Appointments Requested from 2020 to 2022 for New and Existing Patients

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TREND 2

Slight Upward Trend in Patients Scheduled in the Past Year

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TREND 3

Decline in New Patients Scheduled from 2020 to 2022

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TREND 4

Service Availability Stands as the Top Reason for Appointments Not Getting Booked

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TREND 5

Patient Hold Times Average 2.4 Minutes in 2022

01

CONSISTENT RATE OF APPOINTMENTS REQUESTED FROM 2020 TO 2022 FOR NEW AND EXISTING PATIENTS

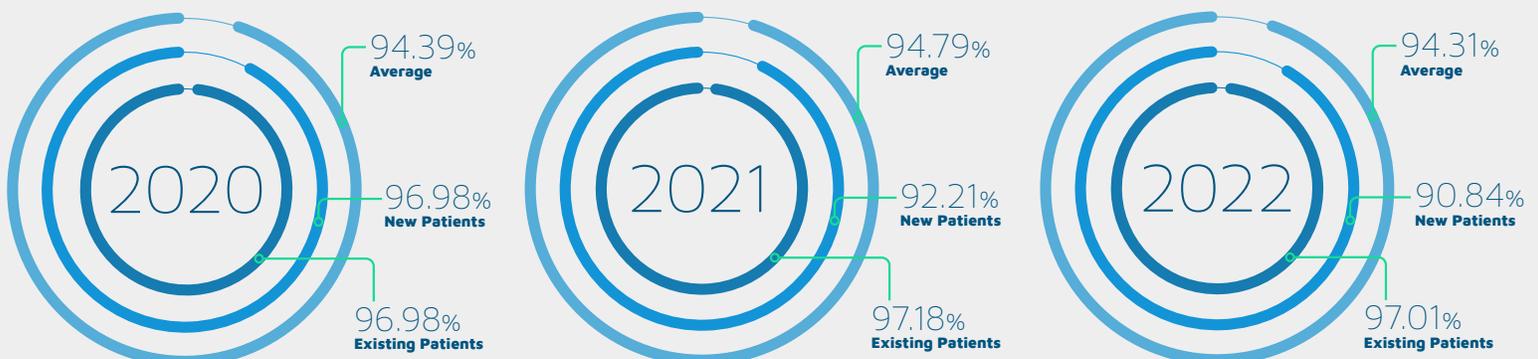
From 2020 to 2022 to date, the rate at which appointments were requested over the phone has stayed consistent. **In 2022, 94.31% of patients who presented an opportunity to schedule an appointment were offered an appointment and invited to come in.** While that number may look good, it should ideally be closer to 100%. Every appointment opportunity should be invited into the practice for an appointment. Even if they have objections, the patient called in because they have a medical need and an appointment should at least be requested.

Suggested tips to ensure you are requesting an appointment from every new and existing patient opportunity are listening to the patient, being personable, and creating word tracks for your staff. It is so important to listen to your patient over the phone as they discuss their medical needs. Depending on the nature of the appointment, the patient may have stress or anxiety and express their concern. They may have a toothache that is affecting their day-to-day life, a pet that has a life-threatening disease, or anxiety about a possible surgery. It is important to pause and listen as they speak so you can ease their concerns and relate with the patient.

Secondly, it is important to be personable. You are trying to sell your practice over the phone. It is vital you give your patient a stellar experience over the phone because this is their first impression of your practice.

Lastly, make sure your staff is armed with word tracks to overcome any objection a patient may have. The most common reason staff may resist requesting an appointment is simply because they were in "order taker mode" and pleasantly answered the patient's questions without any request being made. If a patient calls in asking if you accept a certain insurance, instead of answering "Yes," respond with, "Yes, we do take 'X' insurance. What procedure are you looking at having done?" A suggested response when a patient asks for the price of a certain procedure could be, "Price really depends on the extent of the services needed. The doctor will be able to assess that more precisely during a consultation. Are you free next week for an initial visit?" By avoiding a simple "Yes" or "No" response, you avoid the patient checking your practice off their consideration list.

APPOINTMENT REQUEST RATE FROM 2020-2022*



*2022 data is projected based on data available from January to September of 2022.

02

SLIGHT UPWARD TREND IN PATIENTS SCHEDULED IN THE PAST YEAR

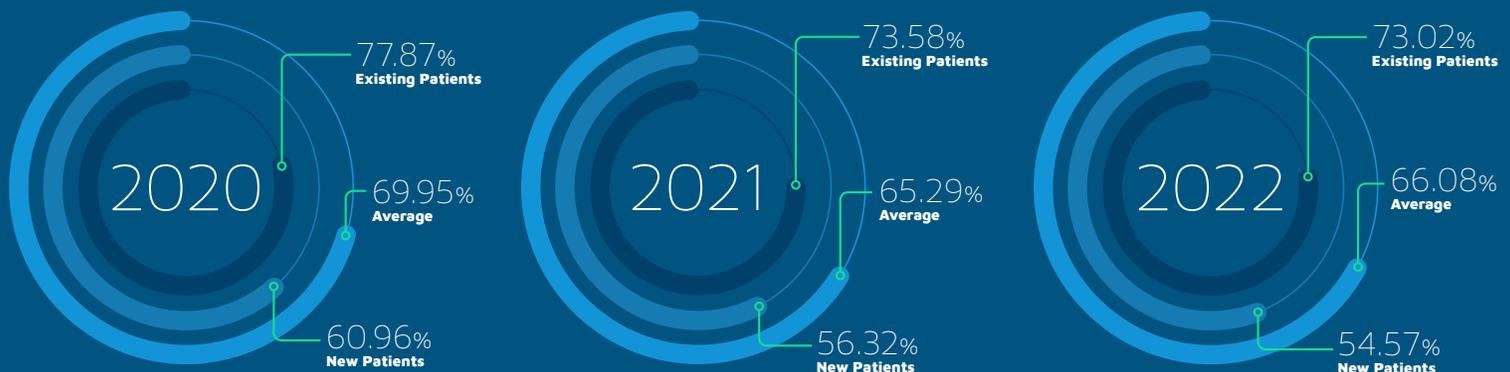
Comparing 2021 to 2022, there has been slight improvement to the average rate of appointments scheduled with a conversion rate of 66.08% in 2022 to date. However, if you look at 2020, the average rate of appointments booked was 69.95%. This indicates that there is still room for improvement in booking appointments. If you break it down by new versus existing patients, new patient appointment conversions are on a steady decline since 2020, and existing patients have a lower booking rate in 2022 than in 2020.

These stats confirm the importance of not only requesting the appointment over the phone, but also having strategies in place to get a firm appointment booked. Unless patients are scheduling a follow-up appointment while they are at your practice, they are giving you a call prior to walking in the door. That being said, it is so important to prioritize the phone. Two strategies your staff should be using when setting firm appointments are the “Whittle and Shepard” technique and setting time aside for outbound calls.

The “Whittle and Shepard” technique is when you ask A/B questions around the patient’s schedule to get a better understanding of what appointment time will work for them. Start by asking the patient if the beginning or end of the week works best for their schedule. Next ask if mornings or afternoons are usually better for them. Then offer two firm appointment times for the patient to choose from. This will make it easier for them to think through their mental schedule and decide on a time, instead of them insisting on calling back to schedule.

Also, make sure to set aside time throughout the day to make outbound calls to all scheduling opportunities that didn’t book. With a decrease in appointments scheduled since 2020, there is room for improvement. The need for healthcare appointments hasn’t decreased, so give them a call back, overcome any objections they may have, use soft phone skills, and sell the appointment! Soft phone skills may include anything from using the patient’s name over the phone, smiling while talking, and giving empathy as you listen to their concerns to be more personable with the patient.

APPOINTMENT SCHEDULED RATE FROM 2020-2022*



*2022 data is projected based on data available from January to September of 2022.

03

DECLINE IN NEW PATIENTS SCHEDULED FROM 2020 TO 2022

A standout trend in appointments scheduled is the decline in new patients scheduled. From 2020 to 2022, **there was a 6.39% decrease in new patients scheduled!** *Why is that?* With many practices experiencing staff shortages and high turnover, it's not uncommon to see practices choosing to forgo scheduling new patients to focus on their existing patient base.

Bringing in new patients to your practice allows you to have a continuous influx of appointment opportunities and should be prioritized at your practice, if possible. Otherwise, that patient could call your competition and become an established patient with another provider. As the market continues to shift, many providers will once again be seeking out new patient opportunities and spending hard-earned marketing dollars to find them.

Set time aside each day to make outbound calls to all missed opportunities, especially new patient opportunities. If they had previously discussed setting an appointment but left the call with nothing scheduled, that patient needs to be followed up with. Now you can see if they are still in need, have set anything, and if your practice is right for them. If new patient appointments are declining at your practice, it may also be time to reallocate your marketing dollars to sources that are driving new patient opportunities to your practice, rather than throwing money at campaigns that aren't producing results.

NEW PATIENTS SCHEDULED FROM 2020-2022*

2020 New Patients



↓ -4.46%

2021 New Patients



↓ -1.75%

2022 New Patients



*2022 data is projected based on data available from January to September of 2022.

04

CALL CONNECTION SLUMPS AT THE BEGINNING AND END OF THE DAY

Why are 33.92% of appointment opportunities not converted into appointments? Patients have many objections when it comes to booking their healthcare appointments. Maybe you do not accept their insurance, your price does not align with their budget, you do not offer the service they need, or their availability does not line up with the times you have available. Whatever their objection may be, it is important to be prepared with the correct response. Your goal during that call should still be to get them in for an appointment.

In 2022, the number one reason for both new and existing patients not getting booked was because of service availability, closely followed by scheduling conflicts.

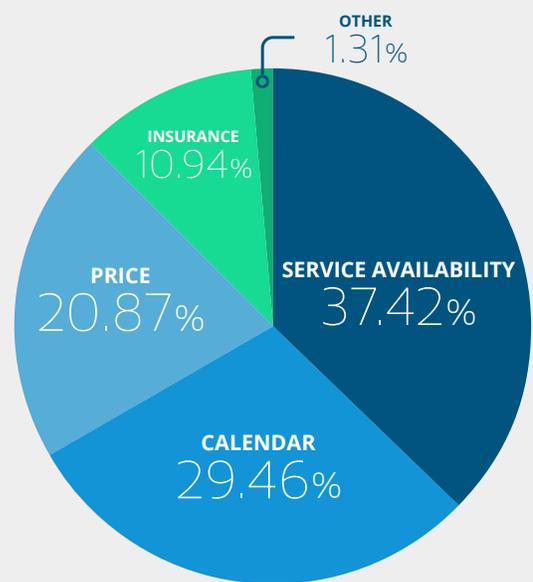
OVERCOMING SERVICE AVAILABILITY OBJECTIONS

Instead of hanging up the phone after confirming you do not offer the service a patient is looking for, ask questions to understand why they need that treatment. How do they know they need a crown? Are they sure they need ACL surgery or will a non-surgical method work? What are their pet's symptoms and could your practice help with a solution? There may be other options they were not aware of, and it is your job to inform them of those alternatives. Try requesting that the patient come in for a consultation to see if there may be a more suitable option. In the event you do not offer an alternative that will work for them, implement processes to refer patients to an affiliated partner that offers the service suggested. This builds trust and keeps the door open when the patient requires services you do offer.

OVERCOMING SCHEDULING CONFLICTS

If a patient calls and is having difficulty picking an appointment date, try utilizing the "Whittle and Shepherd" technique mentioned earlier. You could also consider adjusting your practice's hours to either stay open late, open early, or open the door one Saturday a month to better align with patients' needs. You may also find success in leveraging a waitlist that includes preferred time slots. That way, if a patient cancels at the last minute, you can call the first patient on your waitlist and fill the open time slot. Another example of a scheduling conflict is when a patient needs an emergency appointment, but your practice is booked for the next week. Often, the best way to resolve emergency appointments is by preemptively blocking time out each week to keep available for patients that need immediate attention. Having this time slot available demonstrates that your practice prioritizes the patient's needs.

REASONS WHY APPOINTMENTS WERE NOT BOOKED IN 2022*



*2022 data is projected based on data available from January to September of 2022.

05 PATIENT HOLD TIMES AVERAGE 2.4 MINUTES IN 2022

The average amount of time a patient was left on hold in 2022 was **2.4 minutes**. That is a long time for a patient to wait for you to return to the phone, and many will hang up before you do. Strategies need to be implemented at your practice so hold times are low and patients aren't hanging up out of frustration before you even get the opportunity to request an appointment. The phone is their first impression of your practice, so make it a good one!

This trend leads us to two recommended solutions. First, implement phone bridges to ensure calls are routed efficiently. A bridge is the greeting patients hear when calling such as, "Press 1 for New Patients, Press 2 for Existing Patients, or Press 3 for Billing." This will ensure all patients are routed to the correct department without getting transferred and placed on hold. Second, prioritize immediately calling patients back who hung up on hold. Calling patients back improves the chances of booking an appointment. Furthermore, the patient will appreciate the timely follow-up and apology for the long hold time.



2:24 minutes

ACTIONABLE TIPS AND TRICKS TO IMPROVE APPOINTMENT SCHEDULING RATES



Make sure you are listening to the patient's questions and concerns before requesting an appointment. Being personable over the phone will help with call conversions.



Provide staff with word tracks for common objections like service availability, scheduling conflicts, and pricing concerns.



Implement processes to refer patients to an affiliated partner when you do not offer the service suggested by the patient.



Block off time each week for emergency appointments.



Try the "Whittle and Shepherd" technique. Start by asking the patient if the beginning or end of the week works best for their schedule. Next ask if mornings or evenings are usually better for them. Then offer two firm appointment times for the patient to choose from.



Allocate time for missed call follow-up to recapture otherwise lost appointment opportunities.



Implement a phone bridge to ensure calls are routed efficiently and to reduce hold times.

CLOSING THE GAPS IN PATIENT EXPERIENCE AFTER CALL CONNECTION

You aren't going to book new patients or bring your existing ones back just by answering the phone. Many practices master connecting patients to someone who can help but fall short in guiding patients through the rest of the appointment scheduling journey. You need to make sure you are requesting an appointment every time the phone rings. That may sound straightforward, but many practices struggle with this. Remember, the patient called you with a medical need, so it is your job now to sell your practice to them and request the appointment. Whether they are shopping or ready to book, the worst they can say is 'no.' *But what's worse? You never even ask.*

LEARN MORE

To learn more about Call Box and how we're helping top healthcare practices improve appointment conversions and optimize customer experience, visit www.callbox.com.