



# CRISP PHONE SKILLS

## CONNECT

### 1 REFER TO THE PATIENT BY HIS OR HER NAME

- It is important to get the caller's name upfront and use it throughout the call.
- Studies have shown that using the caller's name throughout the call makes him or her more likely to set an appointment.

### 2 IDENTIFY YOURSELF AND THE PRACTICE

- Be sure to answer the phone by identifying yourself and the practice.
- Speak slowly, clearly, and in a cheerful tone.

## REQUEST & INVITE

### 1

- When it comes time to set the appointment with the patient, you should offer at least two options for the appointment time. Instead of just asking if the caller wants to come in with a yes or no question, you should drill down to the best possible time for an appointment with at least two options.
- Start broad and drill down to the appointment from there. Begin with offering parts of the week, then different days, then different times of day, and finally hours.
- From a psychological perspective, this makes the caller feel like he or she has already agreed to an appointment and you are just clarifying a day and time.

## REQUEST & INVITE

### 2 ATTEMPT TO SET AN APPOINTMENT

- The goal of every phone call is to get an appointment.
- Empathize with the patient and reassure him or her that the best option is to book an appointment with your office.
- Ask if any other family members may need an appointment.

### 3 KNOWLEDGEABLY ANSWER ALL OF THE CALLER'S QUESTIONS

- Answer caller's questions with confidence.
- State what may be a negative answer in a positive way.
- Avoid putting callers on hold or having to call them back with answers.
- If a caller manages to stump you on a question, search out that answer so you're prepared next time.
- Be prepared to answer questions about:
  - Doctor availability
  - Consultation/initial exam price
  - Emergent care
  - Address & hours
  - Accepted insurances
  - Cash discounts or payment plans
  - Services offered in office
  - Schedule availability for particular services

## SET

### 1 SET EXPECTATIONS FOR THE VISIT

- Once an appointment is booked, the agent should let the caller know what to expect by providing directions to the office and telling the caller what will happen upon arrival.
- Providing a preview of what to expect helps make the patient feel more comfortable and heightens your patient experience.

## PURSUE

### 1 CONFIRM THE BEST CALL-BACK NUMBER FOR THE CALLER

- It is important to get the caller's best call back number, preferably early in the call.
- Procuring the best call back number is important because the caller may actually be calling from a home or work phone and prefer to be contacted on a cell phone.
- Getting the best call back number also signals to the patient that you care about his or her business and are working on his or her behalf.

### 2 SET EXPECTATIONS FOR THE RETURN CALL

- Ask the caller for the best day and time to check back in, and let the caller know that he or she can expect your call at that time.
- Confirming a day and time to call a patient back is far better than simply asking, "May I call you back if we get a cancellation?"

CRISP IS THE KEY TO OWNING THE PHONE

