CallBox

FRONT DESK STAFF & AGENTS

USER GUIDE

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OVERVIEW

Call Box is a comprehensive solution to cultivate accountability and reduce inefficiencies in phone handling processes. Thousands of dental practices and DSOs leverage Call Box to capture more appointments, improve phone performance, enhance patient experience, and optimize marketing spend.

CAPTURE MORE APPOINTMENTS

IMPROVE PERFORMANCE

ENHANCE PATIENT EXPERIENCE

OPTIMIZE MARKETING SPEND

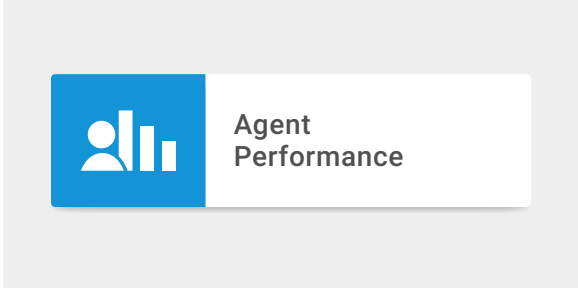
Individual Agents benefit from Call Box by hearing how their call recordings sound and receiving feedback from their Managers or Team Leads. Managers are able to share calls with individual Agents to discuss areas of strength and opportunity. Agents can set goals and track ongoing improvement metrics. Each Agent is also able to receive automated call alerts for missed opportunities on patient calls that may require follow-up.

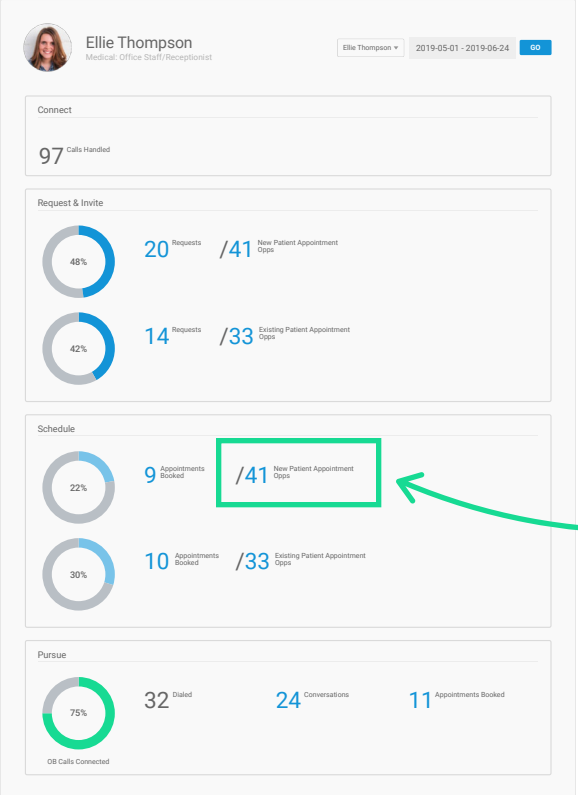
RECOMMENDED USER HABITS

Call Box's reporting provides actionable insight to pinpoint areas of opportunity for individual Agents. Agents are able to measure ongoing growth and utilize Call Box as a resource for improving phone skills. Call Box recommends Agents review and take action on the following reports:

AGENT PERFORMANCE REPORT

The Agent Performance Report provides an in-depth view of an Agent's phone handling performance over a selected date range. Focusing on each metric of CRISP, Agents are scored based on the calls they handle, broken down by new and existing patient appointment opportunities.



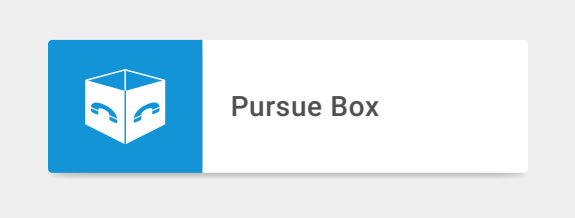


- Track individual agent performance throughout the month on each CRISP metric and set goals for the month ahead.
- Click on each hyperlinked metric to listen to specific calls for self-assessment and development purposes.
- Focus on specific CRISP metrics and collaborate with Managers to identify unique targets for improvement.

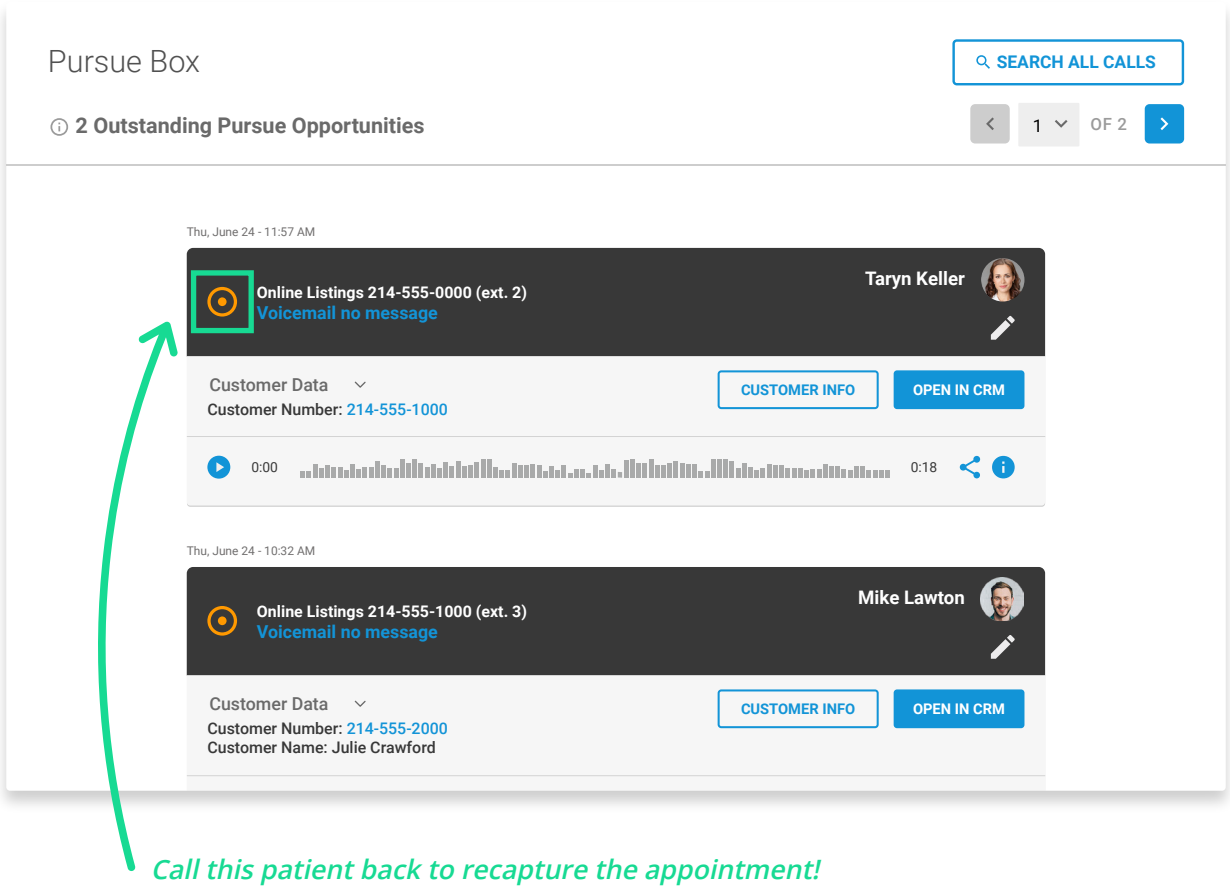
Click on the hyperlinked metric to listen to calls and identify how to improve.

PURSUE BOX

Pursue Box holds unbooked patient opportunities that require prompt attention and should receive an outbound call to book a firm appointment. These opportunities include:



- Declined appointments due to scheduling conflicts
- Declined appointments without a reason given
- Callers who were not invited into the practice
- Callers who did not connect to someone at the practice



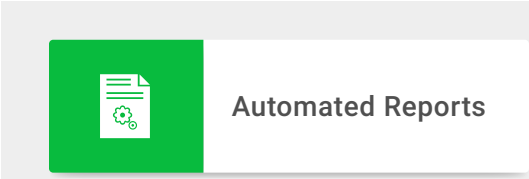
Call this patient back to recapture the appointment!

Unaddressed Patient Detection:

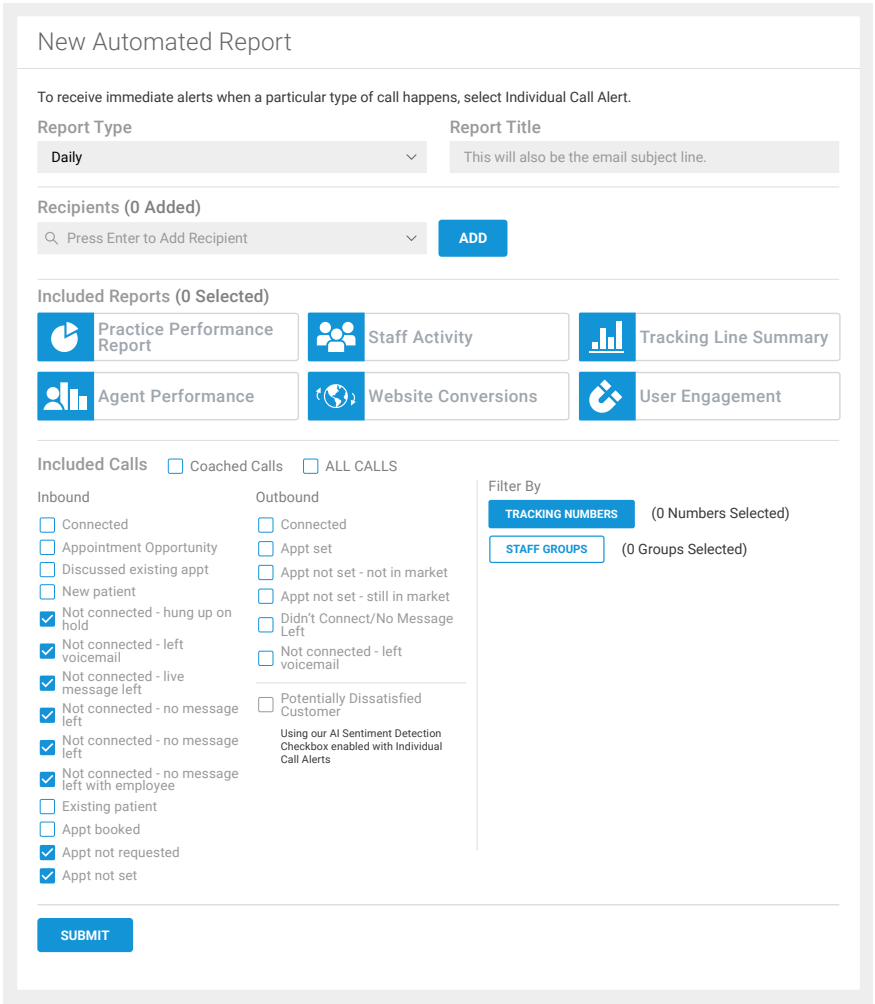
Detects and flags patients awaiting follow-up from the practice and requiring immediate attention. When a caller doesn't connect with someone who can help and hasn't received a follow-up call or text, the patient's missed call in Call Box is detected and flagged.

RECOMMENDED AUTOMATED EMAIL REPORTS

Automated Reports allow Agents to receive Call Box's call alerts sent straight to their emails as soon as opportunities are identified or on a daily basis. This allows Agents to quickly follow up with any patients who require an outbound call. Call alerts are easy to share with others in the office to gain clarity on common objections and hold teams accountable for follow-up processes.



Call Box recommends Agents receive the following call alerts:



LEARN MORE

Tips & Tricks

Support

Check out Call Box's Tips & Tricks resource to learn more best practices and tools for leveraging the phone.

Have more questions about Call Box and how to best leverage its solutions?

Click on the Support resource, call our Support team at 214-446-7867 or reach out to your Call Box consultant for more insight and best practices.