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***TIPS TO***  
**BOOST**  
**REVENUE**  
**AT YOUR PRACTICE**

*How correlated is your staff's phone processes to the bottom line? When each prospective patient calling is worth thousands, decide for yourself.*

When the average new patient is worth thousands of dollars, your practice loses revenue every time it fails to convert a prospective patient phone call into a booked appointment.

This quickly adds up to an immense amount of revenue, as you're undoubtedly seeing a high number of new patients and patient referrals. Essentially, opportunities are always flowing in at your practice.

So what can you do to ensure your team takes advantage of every phone call? This starts with your front office staff, since they're usually a new patient's first contact point with your practice. Unfortunately, due to the many hats they wear – as well as their lack of appointment mindset toward the phone – they don't always properly execute on every phone call. Either all or some of the following scenarios likely happen every day at your practice, negatively affecting your revenue line:



A potential new patient is shopping around for a provider (whether online or off a list provided by her GP). She is put on hold for “just one moment” as soon as she reaches the front desk. She waits on hold for two minutes, hangs up and calls the next provider on her list.



Another caller asks about a specific procedure for her daughter. The receptionist talks about the procedure in great detail but doesn't offer the caller an appointment. The caller is satisfied with the information she obtained, but is likely to book services at another practice that invites her in.



The last caller needs to book his first appointment with the practice sometime within the next two months, but can't commit to a scheduled appointment that far out. The caller says, “Let me think about it and call you back,” but never does. Your receptionist doesn't grab his information nor follow up with him later.



These are unfortunate yet fully preventable interactions.

You have new patients calling in every day, yet only one in five of those callers ever reaches someone who can schedule an appointment.<sup>2</sup> That rate will drastically improve if your phone handlers have the proper training to provide every new caller with a positive first impression of your practice.

Furthermore, that initial appointment is the most important: Once that first appointment is booked, you've secured the patient's commitment to have treatment performed by you and your team.

Feel free to share the following four tips with your front desk so they adopt an appointment-driven mindset and Own The Phone on every call.



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## TREAT CONNECTION AS THE HOLY GRAIL

Sounds super easy, right? Wrong. Providers spend a lot of money and resources on automated answering machines and receptionists to guarantee calls simply get answered, but ignore whether those callers actually ever reach someone who can assist them.

According to Call Box findings, 67% of callers never connect to someone at the practice. They are placed on hold, sent to voicemail or routed to someone who isn't available to take their call.

The key is quickly connecting each patient within the first 30 seconds of initiating the call.

Important: 'Connected' is not office manager Julie picking up the phone and saying "This is Julie with ABC Physicians, may I place you on a brief hold?" 'Connected' is not receptionist Amanda transferring the caller before checking if the doctor's nurse is available to take the call. And finally, 'connected' is not sending the mother of a teenager – who has an issue with a recent visit – straight to voicemail.

'Connected' is ensuring every patient speaks with someone who can help address the patient's issue or book an appointment. The best providers connect callers within 30 seconds of calling.

<sup>2</sup>Based on Call Box data



**CONNECT  
CALLERS WITHIN  
30 SECONDS**



**USE A PHONE  
TREE OR  
IVR**



**PRACTICE WARM  
TRANSFER  
PROCEDURES**



**OFFER TO  
TAKE A LIVE  
MESSAGE**

## **NEED TIPS FOR CONNECTING EVERY CALLER?**

*Office staff should:*

- ✓ Connect callers to someone who can book their appointment within 30 seconds of answering.
- ✓ Use a phone tree or IVR (the automated voice that says "Press 1 if you're a new patient, Press 2 if you're an existing patient and Press 3 for all other calls") to help direct callers to the appropriate area before anyone answers the phone. Ultimately, utilizing a phone tree/IVR saves time and gives your phone handlers better insight into each patient's needs so they don't have to ask several questions.
- ✓ Practice warm transfer procedures to avoid blindly sending callers to their intended party, only for them to find no one on the other end of the line. Check first to see if Dr. Smith's nurse is actually available and present before transferring the patient over. No patient should be sent to voicemail unless specifically requested.
- ✓ If the caller's intended party isn't available on the other line, don't hang up on him or her – offer to take a live message and write down what he or she is calling in for, stating that you'll let the intended party know and get back to the caller afterward. A suggested word track for this scenario is: *"I'm sorry Patty, but Dr. Smith's nurse is actually with a patient at the moment. Can I take a message for you and I'll make sure she gets it and returns your call?"* Having every phone handler trained and working with a "How can I help you?" mentality toward patients goes a long way for your practice's reputation and appointment volume.



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## OFFER AN APPOINTMENT INVITATION

What's the goal of every prospective patient phone call? To schedule the initial appointment.

Why should staff request the appointment on every new patient phone call? Our data shows that 90% of the time, the caller will say yes to scheduling. Share this stat with your staff. The odds are in their favor. Why NOT at least ask for the appointment?

Once you've made the ask for the appointment, know how to handle follow-up questions from the caller. A common response is "Yes, I'll come in, but how much does the procedure cost?" The front office should explain that the purpose of the initial visit and consultation is to provide the best recommendations for care that the patient needs. If pressed on common pricing options, have your staff execute the above and quote a range.

Once the patient agrees to come in, the "whittle-and-shepherd" technique should be executed. This entails offering the caller two different days of the week to determine the best option, then morning or afternoon, then finally two different times for scheduling the appointment. In this situation, staff can say: *"OK Ben, I have availability Wednesday or Thursday this week, which works better for you? Morning or afternoon? Okay, sounds like the afternoon is better – would you prefer 2:15 or 3:45?"*

The fast pace and hectic schedules of our daily lives make open-ended questions regarding appointment commitment difficult. By utilizing the "whittle-and-shepherd" technique, your staff will be able to ask questions that whittle down to the exact time that works best for the new patient. This helps the individual easily answer and avoid mentally shuffling through an upcoming calendar.





**GIVE  
DESCRIPTIVE  
DIRECTIONS**



**DESCRIBE  
BEST PARKING  
LOCATION**



**SET  
CHECK-IN  
EXPECTATIONS**



**SET  
APPOINTMENT  
EXPECTATIONS**

## ESTABLISH VISIT EXPECTATIONS

Tens of millions of Americans admit they have anxiety surrounding visiting the doctor. It can be a scary experience for a variety of reasons. Your team should subside hesitations by communicating the expectations to the patient over the phone, including the who, what and when before arriving at the office.

### **NEED TIPS FOR HELPING NEW PATIENTS FEEL COMFORTABLE PRIOR TO THEIR APPOINTMENT?**

*Office staff should:*

- ✓ Tell patients the office's location with recognizable nearby landmarks, the intersection and the building's appearance.
- ✓ Describe to patients the best and easiest place to park.
- ✓ Let patients know the expected wait time and explain which documents and materials are necessary for the appointment, as well as what paperwork they should expect.
- ✓ Walk patients through what will happen during their visit and how long they might be at the office.





## FOLLOW UP WITH CALLERS WHO DIDN'T BOOK AN APPOINTMENT

Did you know we found that only 4% of practices gather callers' information when they don't book an appointment? More often than not, if a prospective patient calls your practice and doesn't book an appointment, no patient information is collected nor entered into your PMS. This leaves offices unable to follow up with those potential patients. Ever wonder where your marketing dollars are ending up? It's the same place that prospective patients go: into the wind. Follow-up calls are so valuable – and so simple – yet very few offices are executing on them.



**USE A PEN AND  
PAPER NEXT TO  
THE PHONE**



**GIVE REASON  
FOR CALLBACK  
UP FRONT**

### **TO ENSURE PROSPECTIVE PATIENTS DON'T SLIP THROUGH THE CRACKS,**

*office staff should:*

- ✓ Place a pen and paper next to the phone. Write down the caller's name and number as soon as there's a chance to ask. Do it on the front end of the call, asking *"Who do I have the pleasure of speaking with? And what's the best phone number for you in case we get disconnected?"*
- ✓ If a patient says he or she will call back, the likelihood of that happening is slim. During the callback, let the prospective patient know the reason for your call up-front. *"I'm reaching out because we spoke earlier and you were seeking a provider for your daughter. I know our team is the best to help discern her needs. What is your availability for scheduling her initial consultation later this week?"* Then "whittle-and-shepherd" to find the best time.

Since a majority of your callers are likely to come in for several visits, take advantage of their interest and respectfully guide them toward an appointment – every call, every time.