



CALL CENTER DIRECTOR

USER GUIDE



CALL CENTER DIRECTOR USER GUIDE

OVERVIEW

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



**CAPTURE MORE
APPOINTMENTS**



**IMPROVE
PERFORMANCE**



**ENHANCE PATIENT
EXPERIENCE**



**OPTIMIZE
MARKETING SPEND**

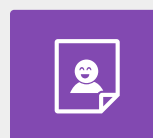
Call Center Directors use Call Box to evaluate agent and team performance on strategic phone handling metrics. They can easily track how their teams are pacing throughout the month and analyze areas of opportunity and growth. Call Box allows Call Center Directors to prioritize inbound or outbound calling efforts to efficiently assign and handle daily workflow. Furthermore, they are able to collaborate with other stakeholders in their organization to drive improvement and strategically tackle shared priorities.

RECOMMENDED USER HABITS

Call Box's reporting provides actionable insight to pinpoint areas of opportunity within call centers. Call Center Directors are able to set goals for growth and hold teams accountable for ongoing improvement. Call Box recommends Call Center Directors review and take action on the following reports:

STAFF PERFORMANCE REPORT

The Enterprise Staff Performance Report focuses on phone performance and conversion metrics for each agent. The report details who might be struggling with particular calls, as well as who is excelling.



Staff Performance

Filter the report to only see call center agents handling patient calls.

Clinic Staff	Filter by Clinic	Download Excel
Clinic Staff		
Call Center Staff		

Handler	Booked	Not Booked	Total Opps	Conv. %
Chelsea Dalton	9	3	12	75%
Brian Allen	7	4	11	63%
Amanda Franklin	8	1	9	89%
TOTALS	24	8	32	75%

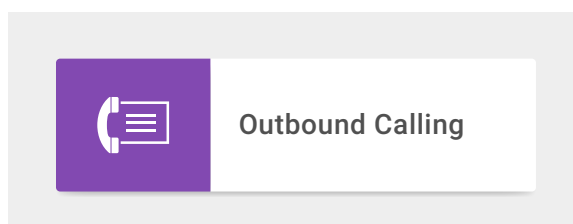
Austin

Handler	Booked	Not Booked	Total Opps	Conv. %
Anna Miller	10	2	12	83%
Beth Wilson	8	3	11	73%
Scott Williams	7	0	7	100%
TOTALS	25	5	30	83%

- ✓ Uncover particular skills that need to be worked on and identify who specifically needs to adjust verbiage on the phone.
- ✓ Utilize the report during team meetings or one-on-one huddles to set incremental goals for improvement.
- ✓ Instill accountability in teams to celebrate top performers and coach those who need assistance.
- ✓ Easily click into and listen to calls handled by each agent that fit certain criteria, such as all appointment opportunities or all booked new patient appointments.
- ✓ Develop friendly competitions among agents that focus on both individual and team-based performance metrics.

OUTBOUND CALLING REPORT

The Enterprise Outbound Calling Report allows Call Center Directors to track not only how many outbound calls their team has made to patients, but also how many times agents have reached a live person and booked an appointment.



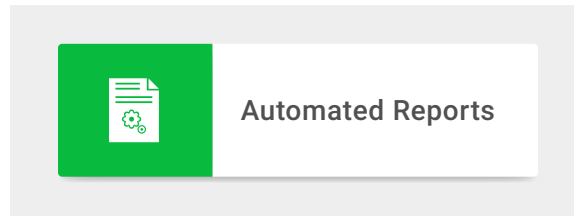
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STAFF & LOCATION BREAKDOWN				
BREAK DOWN BY STAFF		BREAK DOWN BY LOCATION		
Agent ▼	Calls ▼	Unique ▼	Live Connections ▼	Rescued Calls ▼
Anna Miller	118	91	43	28
Beth Wilson	277	270	121	47
Christian Thomas	470	390	178	87
Amanda Franklin	157	151	67	29
Mike Lawton	351	310	56	46

Mike is only having a live conversation on 18% of calls and may need to adjust his calling schedule!

- ✓ Hold agents accountable for ensuring every patient who is not helped receives a call back.
- ✓ Break down calls by each individual agent to see who has been successful in follow-up efforts and who might be struggling with outreach.
- ✓ Track agents' outbound efforts to follow up on Pursue Box opportunities and initiate recare phone calls.
- ✓ Ensure agents are calling during optimal times to reach patients and adjust outbound calling schedules accordingly.

RECOMMENDED AUTOMATED EMAIL REPORTS



Automated Reports allow Call Center Directors to receive any of Call Box's reports sent straight to their emails on a daily, weekly, or monthly basis. This enables them to hold their agents accountable for optimal performance and track ongoing growth metrics in a convenient and consistent manner. Automated Reports are easy to share with other stakeholders in

the organization and collaborate on mutual priorities.

Call Box recommends Call Center Directors set themselves up to receive the following automated email reports to consistently measure goals and identify areas of improvement:

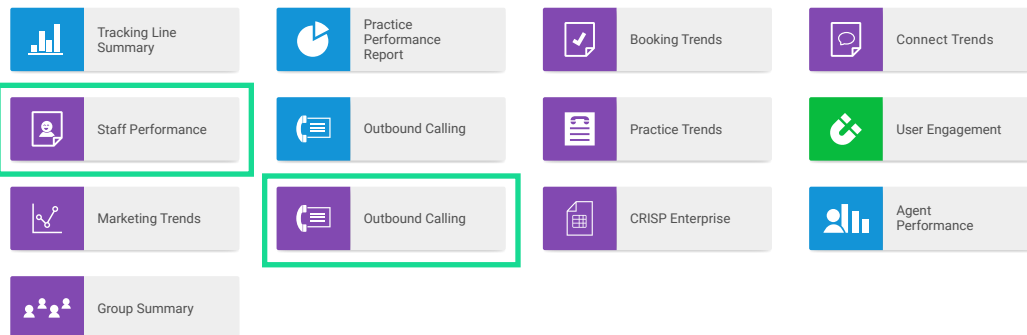


Build a new automated report

Customize your automated report to get the most important calls in your inbox. Add alerts for other calls, change the frequency of your alerts, or tack high-level performance reports to each email.

1 Reports

Select the report(s) you wish to include.



✓ ENTERPRISE STAFF PERFORMANCE

✓ ENTERPRISE OUTBOUND CALLING

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 or contact Call Box's Support Team at 214-446-7867.](#)

