



**REGIONAL MANAGER**

# 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 healthcare organizations leverage Call Box to capture more appointments, improve staff and location performance, enhance patient experience, and optimize marketing spend.



**CAPTURE MORE  
APPOINTMENTS**



**IMPROVE  
PERFORMANCE**



**ENHANCE PATIENT  
EXPERIENCE**



**OPTIMIZE  
MARKETING SPEND**

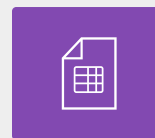
Regional Managers use Call Box to provide the necessary information to oversee their offices' performance. Call Box allows Regional Managers to view high-level reporting across all offices and drill down to individual office needs for more specific training. Call Box's data and analytics show where marketing is excelling and where there could be an opportunity to improve campaign strategy in their region. Additionally, Call Box's reporting allows Regional Managers to receive an overview of individual office performance to ensure booking rates remain consistently high and provide ongoing feedback.

# RECOMMENDED USER HABITS

Call Box's reporting provides actionable insight for Regional Managers to pinpoint areas of opportunity across locations. Regional Managers are able to set goals for growth and hold teams accountable for ongoing improvement. On a monthly basis, Call Box recommends Regional Managers review and take action on the following reports:

## CRISP ENTERPRISE

The CRISP Enterprise Report looks at the average weekly or monthly Connect, Request & Invite, Schedule, and Pursue scores for each office within a group.



### CRISP Enterprise

Call Box CRISP Aggregate Data

Filter by  
Month Week SELECT MONTH  
June 2019

# %

Location	Connect	Request	Schedule	Pursue	Total	Outbound	Inbound	Unique Inbound
1. Fort Worth	87%	94%	75%	23%	69.75%	505	230	178
2. Allen	92%	83%	62%	17%	61%	281	230	119
3. Dallas	68%	83%	83%	8%	60.5%	162	157	106
4. Waco	55%	100%	75%	28%	64.5%	208	98	76

*Set goals for improvement at Dallas and Waco in connecting patient callers!*

- ✓ View the previous month's CRISP metrics for each office and set goals for incremental improvement for the month ahead.
- ✓ Filter by each CRISP metric to identify which offices in a region are comparatively excelling at particular metrics and which require additional attention.
- ✓ Identify which offices are high performers for the month and where to dig in because there is an opportunity for improvement.

## BOOKING TRENDS

Enterprise Booking Trends allows Regional Managers to stay on top of enterprise operations by proactively identifying locations or teams that are falling below the industry standard appointment booking rate.



Booking Trends

## Booking Performance

 Export

✓ All Appointments

Existing Patients

New Patients

GO

BOOKING PERFORMANCE

▼ Practice	▼ Nov	▼ Dec	▼ Jan	▼ Feb	▼ Mar	▼ Apr	▼ Average
Fort Worth	45%	47%	50%	51%	54%	61%	51%
Allen	72%	73%	77%	67%	59%	58%	68%
Dallas	65%	65%	67%	68%	70%	73%	68%
Waco	70%	71%	73%	73%	77%	80%	74%

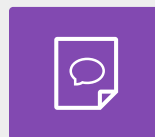
*Step in and proactively resolve the downward trend at the Allen location.*

- ✓ View month-over-month booking trends, broken down by each location, to see each office's percentage of all appointment opportunities booked, new patient opportunities booked, and existing patient opportunities booked.
- ✓ Take preventative action and made appropriate adjustments to ensure offices stay ahead of the competition.
- ✓ Note any offices within the region that may be trending downward and require additional attention and coaching to drive results.
- ✓ Identify offices falling below the industry standard booking rate, highlighted in red font, and set incremental goals for ongoing improvement.



## CONNECT TRENDS

Enterprise Connect Trends tracks how well each location or team is connecting callers to someone who can actually help.



Connect Trends

## Connection Performance

 Export

CONNECTION PERFORMANCE							
▼ Practice	▼ Oct	▼ Nov	▼ Dec	▼ Jan	▼ Feb	▼ Mar	▼ Average
Fort Worth	56%	57%	67%	76%	80%	68%	67%
Allen	81%	83%	82%	82%	84%	85%	83%
Dallas	81%	84%	85%	63%	55%	47%	69%
Waco	88%	80%	72%	73%	71%	70%	76%

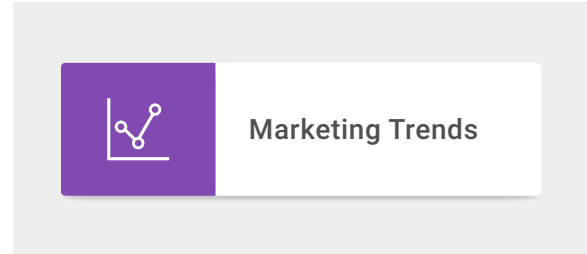
*Dive into Dallas' connection data to uncover and resolve the downward trend.*

- ✓ View month-over-month progress, broken down by each office location, to get ahead of any downward connection trends and proactively uncover solutions.
- ✓ Pull monthly and average connection performance to uncover locations that may be falling below industry standards, highlighted in red font.
- ✓ Proactively pinpoint which offices within the region may need additional coaching, call routing adjustments, or staffing tweaks to ensure every patient is connected in a timely manner to someone who can help.

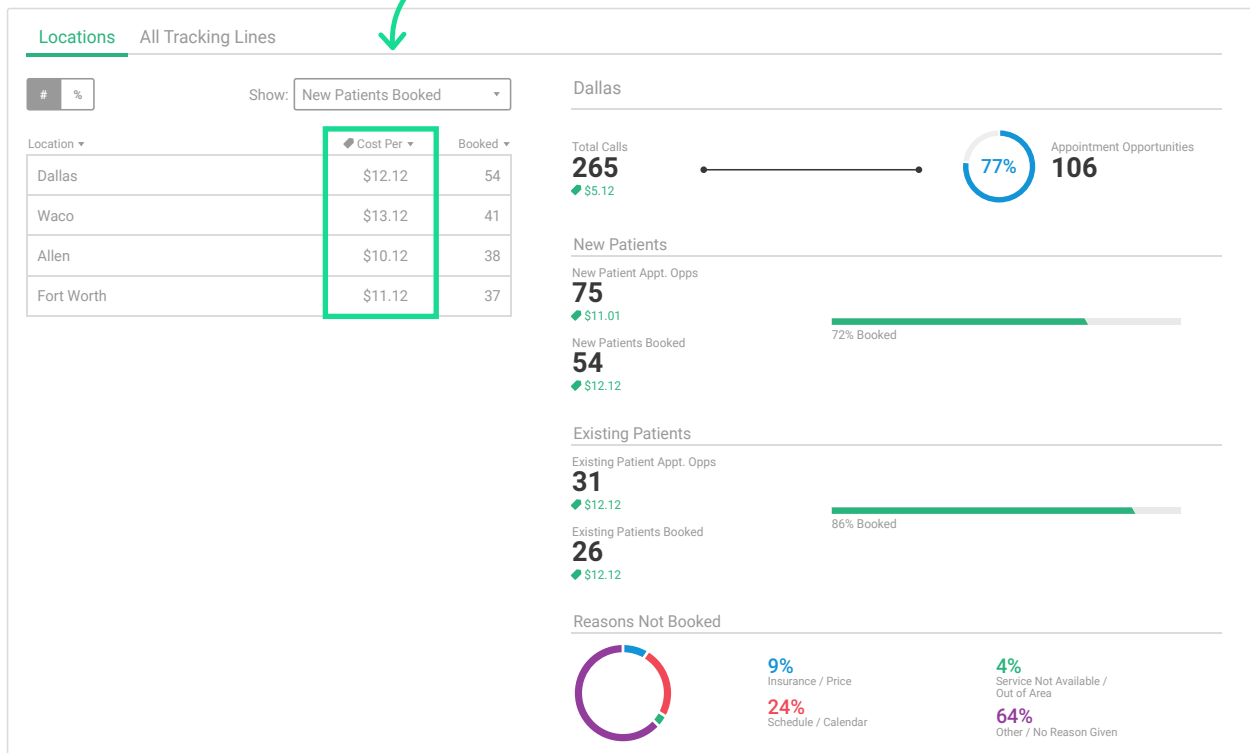


## MARKETING TRENDS

Marketing Trends provides an overview of marketing campaign performance for a group of practices. Regional Managers use this report to get a high-level view of their region's marketing campaigns and evaluate the effectiveness of their marketing spend.



Identify the cost for each new patient booked.



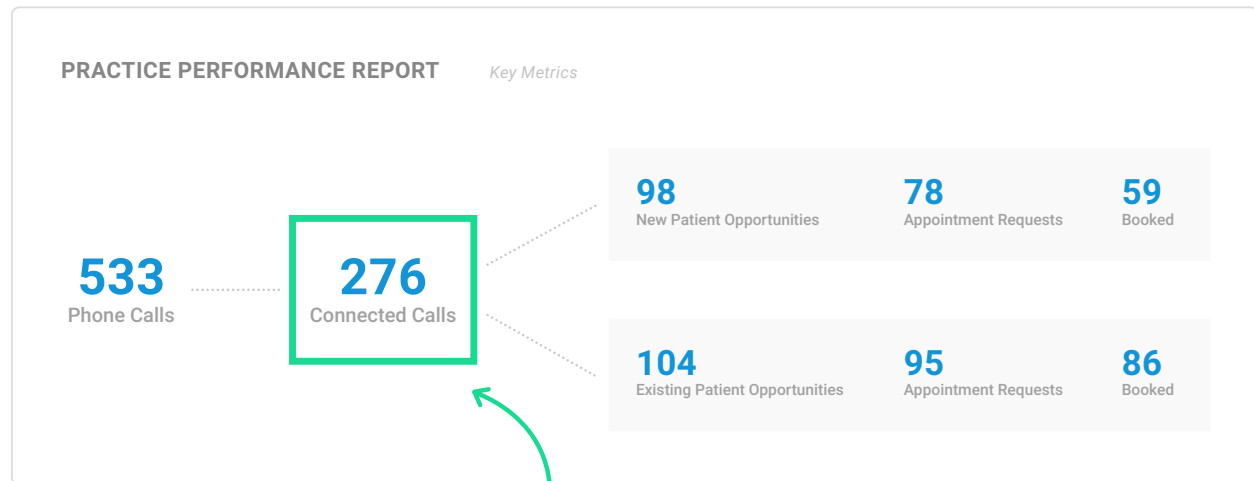
- ✓ Analyze marketing performance and trends across locations, drilling down to the success of each marketing source.
- ✓ Focus in on each office individually to determine which campaign works best on an individual office level.
- ✓ Input monthly average cost per campaign to get a clear ROI and determine exactly how much money is being spent on each appointment opportunity call.
- ✓ Make informed decisions on where to allocate marketing spend, whether that's focusing on a particular media or geographic area.

## PRACTICE PERFORMANCE REPORT

The Practice Performance Report provides an overview of key phone handling analytics rolled up into 4 distinct metrics — Connect, Request & Invite, Schedule, and Pursue — for each individual office within a region.

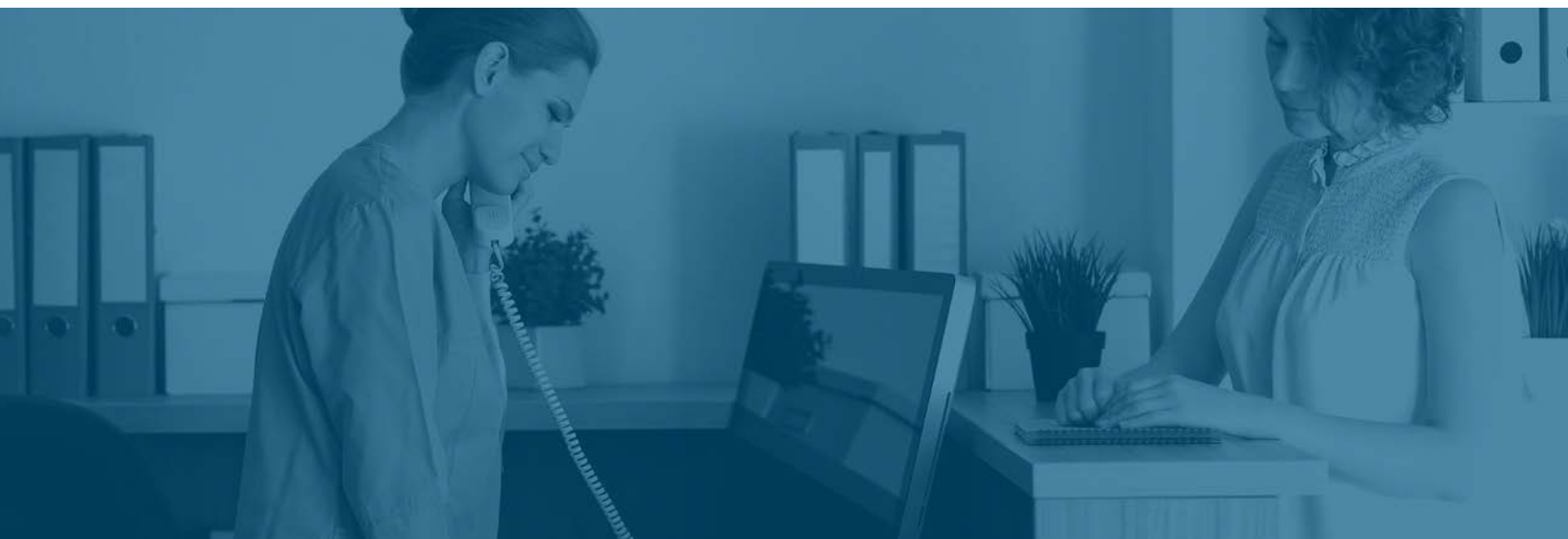


### Practice Performance Report

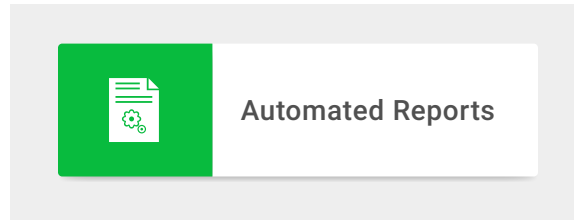


*Dive into the Connection section to identify where patient calls are falling through the cracks at this location!*

- ✓ Uncover trend-based insight that allows Regional Managers to make actionable and educated improvements in phone processes.
- ✓ Meet with Office Managers regularly to review performance and open the dialogue to resolve problem areas on the phone.
- ✓ Dive into the report early in the month to identify areas of opportunity for the month ahead — define a focus and outline what is required to achieve continued growth.
- ✓ Hold Office Managers accountable for ongoing improvement on key phone metrics.




# RECOMMENDED AUTOMATED EMAIL REPORTS



Automated Reports allow Regional Managers to receive any of Call Box's reports sent straight to their email on a daily, weekly, or monthly basis. This enables them to hold teams 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 Regional Managers 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.

 Tracking Line Summary	 Practice Performance Report	 Booking Trends	 Connect Trends
 Staff Performance	 Outbound Calling	 Practice Trends	 User Engagement
 Marketing Trends	 Outbound Calling	 CRISP Enterprise	 Agent Performance
 Group Summary			

✓ PRACTICE PERFORMANCE REPORT FOR EACH LOCATION

✓ BOOKING TRENDS

✓ CONNECT TRENDS

✓ MARKETING TRENDS

✓ CRISP ENTERPRISE



# 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.

