



MEDICAL PRACTICES

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WHAT'S THE PROBLEM WITH THE PHONE?

As competition in the healthcare industry rises, every opportunity to get patients into the office matters more than ever, specifically over the phone. Patients don't walk into offices to book appointments, they call. **Since the phone is the first experience patients have with your practice; it is how they perceive they'll be treated by your staff and it determines whether they'll book an appointment.**

However, during a recent study, Call Box discovered:

- On average, 67% of all callers to a practice never reach someone who can help.
- Furthermore, 42% of appointment opportunities go unbooked due to the front desk's poor phone handling.

The industry is operating with an immense blind spot – the phone. At the practice-level, the lack of visibility into every call has led office managers to settle for mediocre connection rates. At the management-level, CEOs and district, regional, and practice development managers are left guessing why some practice locations are generating less revenue than others.

The industry is missing out on untapped revenue originating from a poor patient experience over the phones.

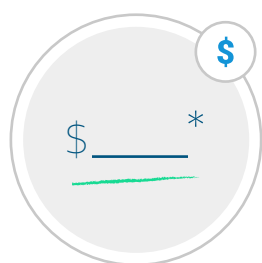
Call Box is the solution that takes what is a liability – the phone – and transforms



it into a strength. We work with more than 5,000 healthcare practices to help turn their agents into confident phone experts who consistently Own The Phone.

WHAT IS THE PHONE COSTING YOU?

Insert your practice's metrics to find out how much revenue you could be leaking on the phone.



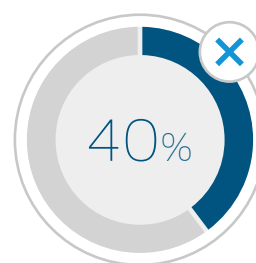
**AVERAGE NEW PATIENT
APPOINTMENT**
**[insert your practice's metric]*

×



**AVERAGE PRACTICES
RECEIVE 40 APPOINTMENT
OPPORTUNITY CALLS/WEEK**

×



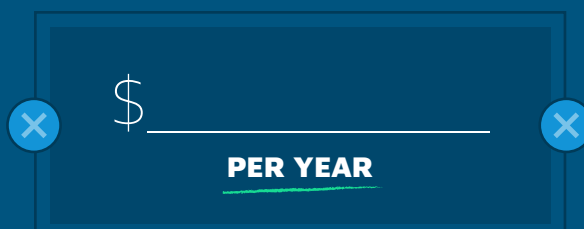
**4 OUT OF EVERY 10 NEW
PATIENT OPPORTUNITIES ARE
NOT BOOKED**

=

PRACTICES THAT DO NOTHING TO IMPROVE ON THE PHONE COST THEMSELVES



✓

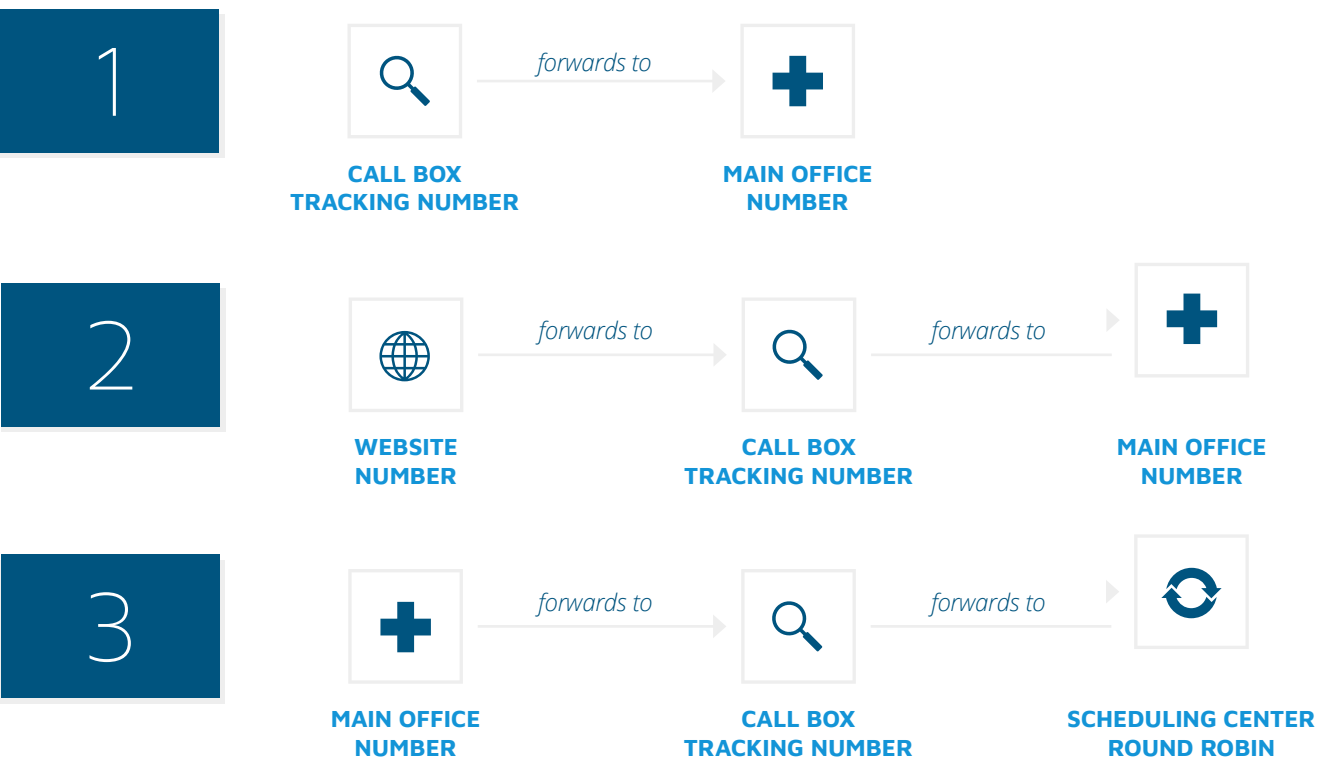


CALL TRACKING 101

The first step to solving blind spots occurring over the phone and optimizing ROI is by receiving in-depth insight into every single phone call. Basic call tracking solely provides call counts and recordings, which unfortunately doesn't remove the blind spots. Without taking the time to listen to each of these calls, the data provides very little value.

Call Box goes a step further, offering actionable call tracking. Our trained, human reviewers listen to and review every single patient call. This data gives managers full insight into how staff is performing on the phone and identifies when patients are having a poor phone experience. Even better – it's incredibly easy to implement. It requires no hardware installation or spending loads of money – just Call Box working alongside you to ensure a quick setup.

SOME ROUTING OPTIONS OUR CLIENTS USE TO CAPTURE CALLS:



Call tracking allows practices to track appointments booked over the phone and optimize ROI. **With Call Box's help, the headache surrounding overhauling phone processes disappears.**

WHAT GETS MEASURED GETS MANAGED

There is a minimum phone performance commitment needed for a practice to maintain an excellent reputation and enhance patient satisfaction. Without easily accessible and detailed insight into what's happening on phone calls, most practices suffer financially. This is where Call Box comes in.

Call Box works with stakeholders who want to increase patient volume, but don't know where to start; are tired of not knowing what occurs on every call; would like better insight to capture more appointments and enhance marketing ROI; and are looking to instill an appointment-driven culture in their offices. We track and record every inbound and outbound call at your practice, providing insight into booking opportunities occurring both on the phone and in your Practice Management System.

OWN THE PHONE WITH CRISP.

CRISP is Call Box's methodology to help practices Own The Phone. The simple, yet actionable acronym includes the essential elements for a successful phone regimen:

C

CONNECT

Ensure every patient is connected with someone who can book an appointment or address the concern. Note that connecting calls is not synonymous with answering calls; if someone is spoken to and then sent to voicemail or is left on hold, that would not count as connected.

R/I

REQUEST/INVITE

This is where practices miss the mark the most. The front desk staff is nice, polite, and professional, but isn't converting patient calls into booked appointments enough. Make sure every appointment opportunity is capitalized on by inviting every patient into the office.

S

SCHEDULE

Reduce no-shows by offering a specific date and time for the appointment and confirm with a reminder.

P

PURSUE

Enhance the patient experience. Follow up with patients who never connected to someone who could help and callers who were unable to book an appointment on the initial call.

WHEN OFFICES FOCUS ON PHONE EXPERIENCE, THEY BOOK MORE APPOINTMENTS

BOOK MORE APPOINTMENTS

Keep your existing patients returning, but even more important, book more new patients. A new patient, who – on average – is likely to return for 18 years, means more money. Salvage every appointment opportunity with Call Box’s Missed Opportunity Alerts.

Call this new patient opportunity back!

Mon, Jan 24 - 8:57 AM

Website 469-555-1000 (ext. 3)
New Patient, Appt Opp, Appt Requested, Not Booked - Calendar

Chelsea Dalton

Customer Data ▾

Customer Number: 214-555-1000
Event Status: Open Lead

CUSTOMER INFO

OPEN IN CRM

Campaign: Pediatric Appointments
(Similar Audience Bids Only)
Keyword: same day appts Dallas

Ad Group: Dallas Urgent Care
Type: Call from website

0:00

6:14

Receive breakdowns of your call-to-appointment conversions.

Missed Opportunities

PATIENT LIFETIME VALUE

All appointment opps not booked or unconnected calls should be considered missed opportunities.

35

30 New
5 Existing

Appointment Opps
Not Booked

\$1000 Lost Value

80%

Connection Rate

40

Unconnected Calls

159

Connected Calls

90 New Opps

65 New Requests

60 New Booked

30 Existing Opps

25 Existing Requests

25 Existing Booked

OPTIMIZE MARKETING ROI

In a highly saturated market, patient referrals are pivotal to growing your practice. What are you doing to track why and where they're calling in from? Hopefully you're not relying on asking the patient where he or she found you. Tracking Line Summary pinpoints which marketing campaigns are bringing in the most calls and booked appointments so you can salvage ROI.

TRACKING LINE CALLS DATA

INDIVIDUAL TRACKING LINE DATA				BRIDGE/EXTENSION TOTAL DATA			
Tracking Line ▾	Calls ▾	Unique ▾	Connected ▾	Appt. Opps (New Existing) ▾	Appts Booked (New Existing) ▾	Minutes ▾	Avg. Duration ▾
Main Line 214-123-5678	214	163	206	108 81	55 60	619	3:00
↳ New Patients	81	61	78	70 4	28 18	234	4:21
↳ Existing Patients	64	49	61	6 52	17 21	185	2:13
↳ Billing	29	22	28	9 10	3 8	84	3:49
↳ Operator	40	31	39	23 15	7 13	116	2:17
Yelp 214-123-0123	137	114	131	67 36	52 32	466	3:56
Google Listing 855-123-4567	136	98	114	56 37	40 31	275	2:41
Facebook 214-123-3456	50	38	31	13 8	9 4	175	3:23
New Patient Mailer 888-987-6543	22	19	17	7 4	3 1	47	5:15

Locations All Tracking Lines

#	%	
Show: New Patients Booked ▾		
Location ▾	Cost Per ▾	Booked ▾
Dallas	\$12.12	54
Waco	\$13.12	41
Houston	\$10.12	38
Fort Worth	\$11.12	37

Dallas Smiles



New Patients

New Patient Appt. Opps

75

◆ \$11.01

New Patients Booked

54

◆ \$12.12

72% Booked

Existing Patients

Existing Patient Appt. Opps

31

◆ \$12.12

Existing Patients Booked

26

◆ \$12.12

86% Booked

Reasons Not Booked



9%
Insurance / Price

24%
Schedule / Calendar

4%
Service Not Available /
Out of Area

64%
Other / No Reason Given

IMPROVE STAFF PERFORMANCE

Ensure patients return to your practice. Focus on improving their phone experience with proactive Call Box data that holds staff accountable to exceptional phone performance.

STAFF PERFORMANCE

#

Agent	Total Calls Handled	INBOUND			Total Calls (Outbound)	OUTBOUND	
		Appt Opps (New Existing)	Appt Request (New Existing)	Appt Booked (New Existing)		Live Convo	Appt Booked
Jennifer Martin	16	5 11	3 10	2 7	30	21	9
Tyler Enid	9	3 6	1 6	1 4	17	15	5
Ali Cooper	26	5 21	4 16	4 11	30	26	15
Mike Ventura	30	7 23	6 20	4 18	35	32	22
Ruth Williams	32	12 20	9 16	6 12	40	35	18
TOTALS	113	32 81	23 68	17 52	152	129	69

All Staff

Filter By Location (2/3)

#

Dallas

Agent	Total Calls Handled	INBOUND			Total Calls (Outbound)	OUTBOUND	
		Appt Opps (New Existing)	Appt Request (New Existing)	Appt Booked (New Existing)		Live Convo	Appt Booked
Chelsea Dalton	26	6 20	2 8	3 8	15	8	11
Brian Allen	19	8 11	1 7	2 4	22	12	6
Carrie Bowers	12	6 6	2 8	4 8	16	13	12
Adam Leonard	16	5 11	3 10	3 16	24	18	19
TOTALS	73	25 48	8 33	12 36	77	51	48

Austin

Agent	Total Calls Handled	INBOUND			Total Calls (Outbound)	OUTBOUND	
		Appt Opps (New Existing)	Appt Request (New Existing)	Appt Booked (New Existing)		Live Convo	Appt Booked
Anna Miller	20	9 11	2 5	3 10	28	17	13
Ellie Thompson	15	5 10	3 6	2 8	16	12	10
Scott Williams	21	3 18	2 15	6 12	25	19	18
James Kennedy	19	8 11	8 10	5 11	30	17	16
TOTALS	75	25 50	15 36	16 41	99	65	57

DON'T TAKE OUR WORD FOR IT – TAKE THEIRS

How has Call Box helped providers improve on the phone?

Take it from the University of Minnesota Physicians (UMP). UMP has established a thriving phone culture that optimizes and augments quality assurance by using CRISP.

METRIC	BEFORE CALL BOX		AFTER CALL BOX
CONNECT	66%	→	82%
REQUEST/INVITE	62%	→	91%
SET	53%	→	73%
PURSUE	36%	→	87%
OVERALL CRISP SCORE	56%	→	83%

**Over a period of 5 months.*

UMP's call center noticed its typical number of **booked appointments increase by 18% in just 8 short weeks!**

There's proof in the stats that Call Box works, and works well.

“

“Before Call Box, there wasn't a structure in place for routine call auditing to see if specific behaviors or actions were occurring on the phone. With Call Box, there are monthly reports about what's happening on the calls so we can track improvements and see if there are areas and trends that need to be highlighted. We started a CRISP competition among the agents and there was impressive buy-in from our six teams. Agents are more engaged and have even begun enlisting other team members to perform particular metrics on calls.”

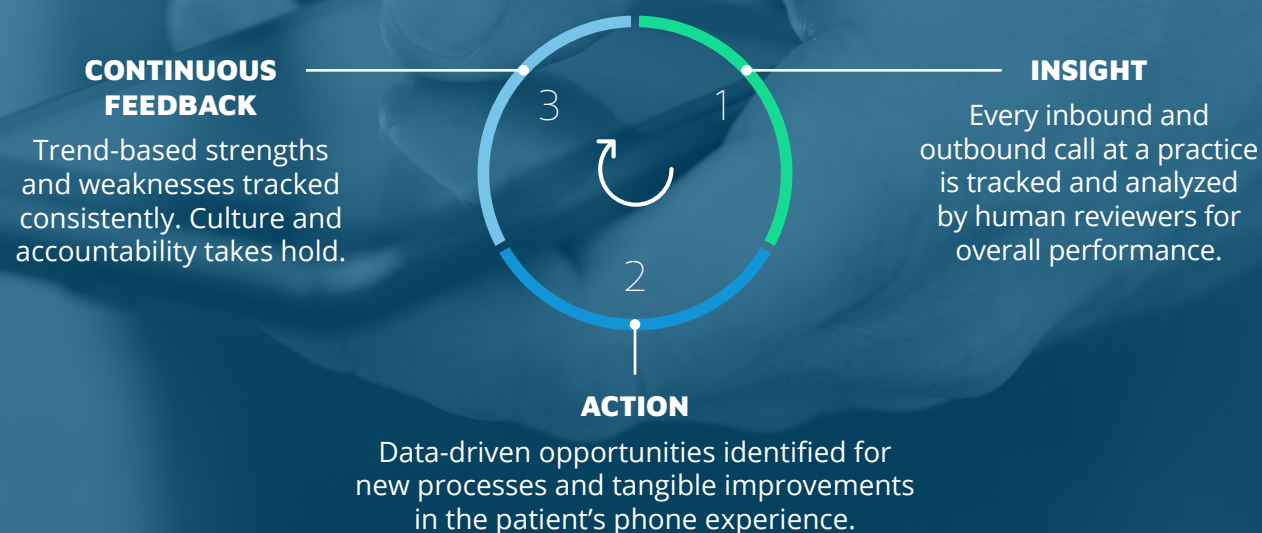
Joe Paschka

Manager, Call Center Operations at University of Minnesota Physicians



CALL BOX:**CONTINUAL IMPROVEMENT
FOR YOUR PRACTICE**

The goal of Call Box is to help you stay laser-focused on the most critical phone metrics that affect patient experience. Here's how we do it.

**CALL BOX'S FEEDBACK LOOP WILL:**

Serve as a cloud-based solution that requires no hardware installation.



Provide CRISP reporting with complete insight into what's happening on the phone.



Listen to and recap 100% of your inbound and outbound calls, not just a sampling.



Pinpoint which marketing sources are converting to calls and booked appointments so you can optimize ROI.



Ensure calls are quickly reviewed and alert you when a potential missed opportunity needs your attention with customized email alerts.



Give detailed phone performance reporting, broken down by individual agent and location.

TO BECOME CRISP ON EVERY CALL,
visit callbox.com/medical-practices or call us at 833-208-6104.