



EXECUTIVE

USER GUIDE



EXECUTIVE 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 staff and location performance, enhance patient experience, and optimize marketing spend.



**CAPTURE MORE
APPOINTMENTS**



**IMPROVE
PERFORMANCE**



**ENHANCE PATIENT
EXPERIENCE**



**OPTIMIZE
MARKETING SPEND**

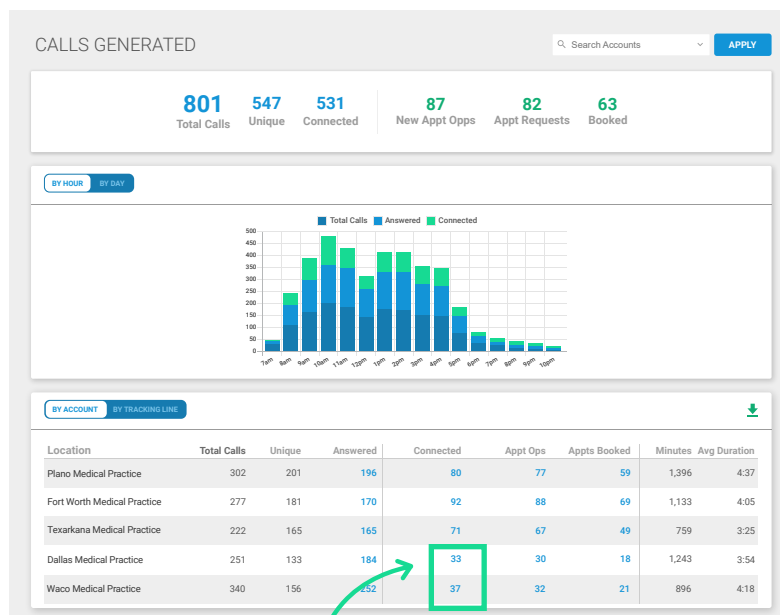
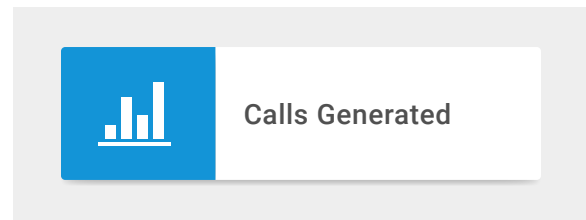
Executives use Call Box as a checkpoint to keep tabs on the day-to-day operations of their practices and the effectiveness of their efforts. Through trend-based reporting, Executives are able to get ahead of downwards trends, focus on the locations that need their attention, and hold their teams accountable for optimal performance and growth. Call Box allows Executives 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 for Executives to pinpoint areas of opportunity across locations. Executives are able to set goals for growth and hold teams accountable for ongoing improvement. On a monthly basis, Call Box recommends Executives review and take action on the following reports:

CALLS GENERATED

The Calls Generated Report looks at the total inbound calls, connected calls, new and existing patient appointment opportunities, and new and existing patient booked appointments for each practice within a group.

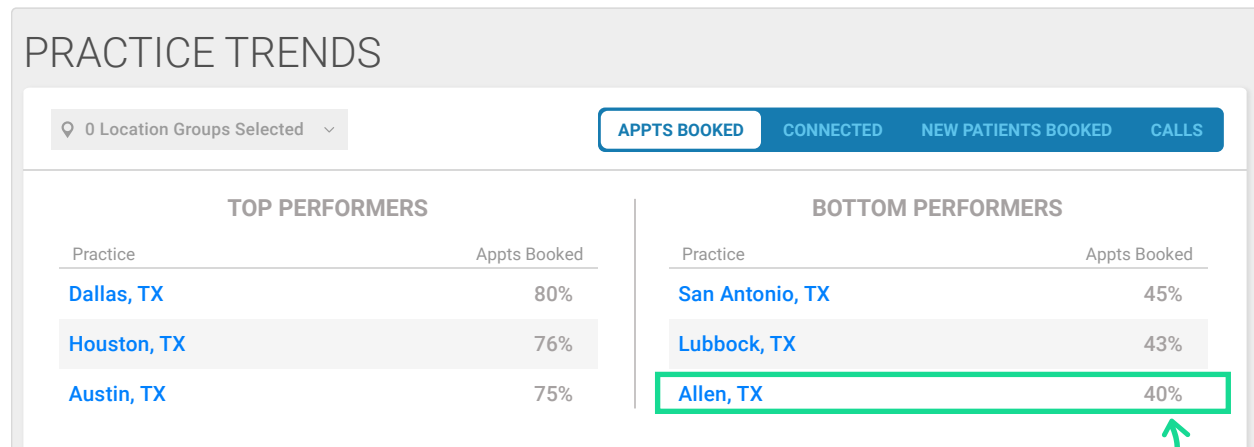
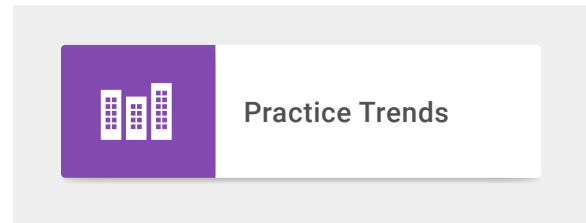


Set goals for improvement at Dallas and Waco in connecting patient callers!

- ✓ Filter by each CRISP metric to identify which offices are comparatively excelling at particular metrics and which require additional attention.
- ✓ Identify which practices are high performers and where to dig in because there is an opportunity for improvement.
- ✓ Toggle to view call volume by tracking line to see which sources are driving the highest volume of calls and appointment opportunities.

PRACTICE TRENDS

The enterprise Practice Trends Report allows executives to stay on top of enterprise operations by proactively identifying locations or teams that are falling below the industry standard for appointments booked, connected calls, new patients booked, and total calls.



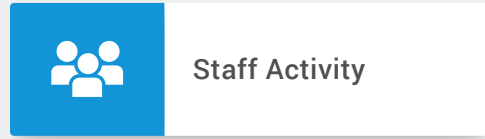
Step in and proactively resolve the downward trend at the Allen location.

- ✓ View month-over-month trends, broken down by the top and bottom performing practices, to see each practice's percentage of appointments booked, connected calls, new patients booked, and total calls.
- ✓ Take preventative action and make appropriate adjustments to ensure practices stay ahead of the competition.
- ✓ Note any practices that may be trending downward and require additional attention and coaching to drive results.
- ✓ Identify practices falling below the industry standard, highlighted in red font, and set incremental goals for ongoing improvement.



STAFF ACTIVITY

The enterprise Staff Activity Report tracks how well the staff at each practice are scheduling appointment opportunities and highlights who may need additional coaching or feedback.



STAFF ACTIVITY

Agent	Connected Calls Handled	Appt Opps (New Existing)	Appt Request (New Existing)	Appt Booked (New Existing)
Jack Young	27	1 6	0 8	2 4
Wendy Miller	15	0 9	2 7	4 2
Amy Graham	8	2 3	3 7	1 5
TOTALS	50	3 18	5 22	7 11

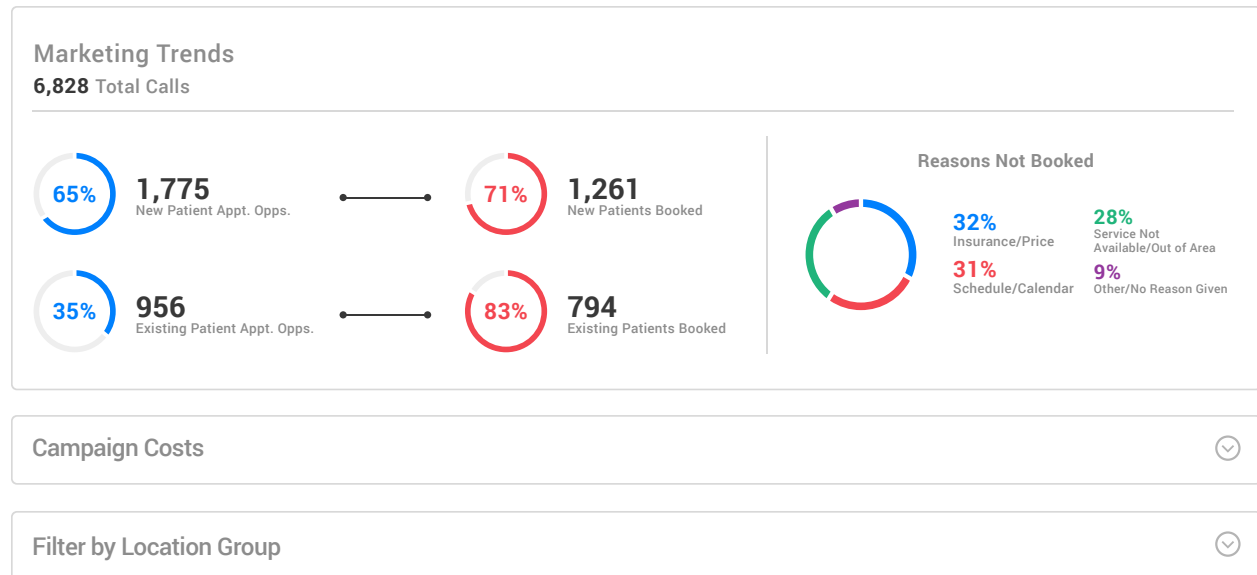
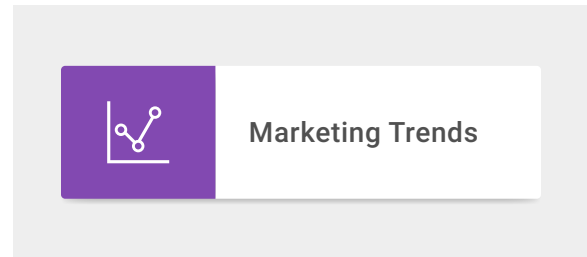
- ✓ View all connected inbound and outbound calls handled by the team, broken down by each practice, to get ahead of any downward requesting and inviting and scheduling trends.
- ✓ Proactively pinpoint which practice and team members may need additional coaching to ensure every appointment opportunity is converted into a booked appointment.

- ✓ Expand the date range to view month over month trends and filter by location to uncover locations that may be falling below group standards.



MARKETING TRENDS

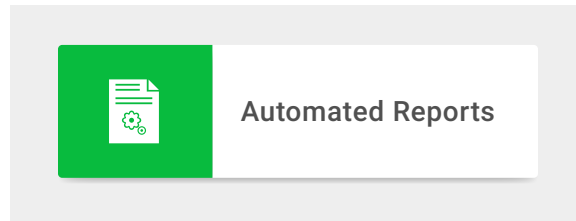
Marketing Trends provides an overview of marketing campaign performance for a group of practices. Executives use this report to get a high-level view of their organization's marketing campaigns and evaluate the effectiveness of their marketing spend.



- ✓ Analyze marketing performance and trends across locations, drilling down to the success of each marketing source.
- ✓ 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.

- ✓ Focus in on each office individually to determine which campaign works best on an individual office level.
- ✓ Make informed decisions on where to allocate marketing spend, whether that's focusing on a particular media or geographic area.

RECOMMENDED AUTOMATED EMAIL REPORTS



Automated Reports allow Executives 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 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 Executives set themselves up to receive the following automated email reports to consistently measure goals and identify areas of improvement:

New Automated Report

To receive immediate alerts when a particular type of call happens, select Individual Call Alert.

Report Type: **Daily** Report Title:

Recipients (0 Added)
 Press Enter to Add Recipient **ADD**

Included Reports (0 Selected)

- Practice Performance Report
- Staff Activity
- Tracking Line Summary
- Agent Performance
- Website Conversions
- User Engagement

Included Calls Coached Calls ALL CALLS

Inbound

- Connected
- Appointment Opportunity
- Discussed existing appt
- New patient
- Not connected - hung up on hold
- Not connected - left voicemail
- Not connected - live message left
- Not connected - no message left
- Not connected - no message left with employee
- Existing patient
- Appt booked
- Appt not requested
- Appt not set

Outbound

- Connected
- Appt set
- Appt not set - not in market
- Appt not set - still in market
- Didn't Connect/No Message Left
- Not connected - left voicemail
- Potentially Dissatisfied Customer

Filter By

- TRACKING NUMBERS** (0 Numbers Selected)
- STAFF GROUPS** (0 Groups Selected)

SUBMIT

- ✓ CALLS GENERATED
- ✓ MARKETING TRENDS

- ✓ STAFF ACTIVITY
- ✓ PRACTICE TRENDS

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.](#)

