



VETERINARIAN

USER GUIDE



VETERINARIAN USER GUIDE

OVERVIEW

Call Box is a comprehensive solution to cultivate accountability and reduce inefficiencies in phone handling processes. Thousands of veterinary practices 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**

Veterinarians use Call Box as a checkpoint to keep tabs on the day-to-day operations of a practice. They're able to better understand the office call flow and uncover opportunities seized or missed by the office. Call Box pinpoints the reasons callers are not scheduling appointments and gives Veterinarians insight into the content and outcome of calls to better serve their patients.

RECOMMENDED USER HABITS

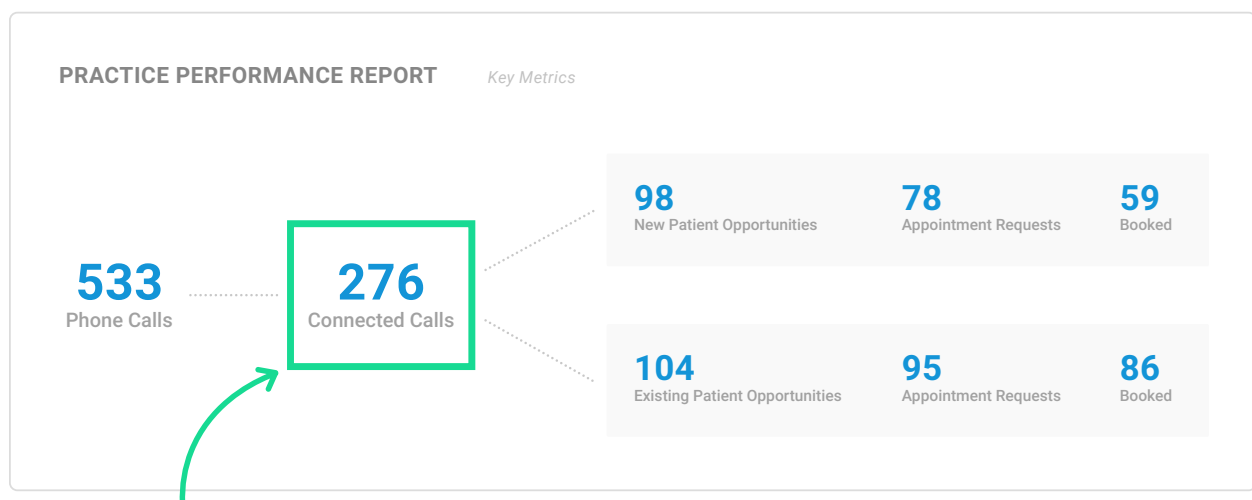
Call Box's reporting provides actionable insight for Veterinarians to identify areas of opportunity at their offices. Veterinarians are able to set goals for growth and hold staff accountable for ongoing improvement. Call Box recommends Veterinarians review and take action on the following reports:

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.



Practice Performance Report



Dive into the Connection section to identify where patient calls are falling through the cracks!

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

TRACKING LINE SUMMARY

The Tracking Line Summary provides a detailed view of each source Call Box is tracking. Call Box recommends creating a new tracking line for each unique source to ensure accurate metrics and outcomes. This typically includes:



Tracking Line Summary

DIGITAL MARKETING SOURCES

Website, Google, emails, social media, etc.

MAIN LINE TRAFFIC

Contact Call Box for options to track main line.

TRADITIONAL MARKETING SOURCES

Mailers, business cards, newspaper ads, etc.

SPECIFIC WORKFLOW CALLS

Referring providers, call-back numbers, etc.

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	
Newspaper Ad 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	
Uptown Mailer 888-987-6543	22	19	17	96 7	85 6	47	5:15	

This geographic area generated 85 new patient appointments from a mailer!

- ✓ Pinpoint which sources are driving new patients and booked appointments to identify where to continue investing marketing dollars.
- ✓ Break down not only how many calls are coming in on each tracking line, but also the outcome of the conversation.
- ✓ Tweak campaigns based on transparent data and results.

- ✓ Track direct mail drops and keep tabs on digital marketing efforts to understand which geographic areas respond more favorably to which campaign approach.
- ✓ Ensure front desk staff is informed on specific campaigns and uncover gaps in communication of marketing efforts.



USER ENGAGEMENT REPORT

The User Engagement Report provides detailed insight into how each Call Box user is interacting with and utilizing Call Box's data and reporting.



User Engagement


User Engagement

 Jun. 1 - Jun. 24, 2019 

Dallas Clinic

All Users

VIEW RESULTS



▶ Logins (including from CRM)

10

▶ Listened to a Call (including from CRM)

37

▶ Set up a New Report/Edited a Report

1

▶ Edited a Number

0

▶ Deactivated a Number

0

▶ Report Generated - Details

15

▶ Report Generated - Summary

15

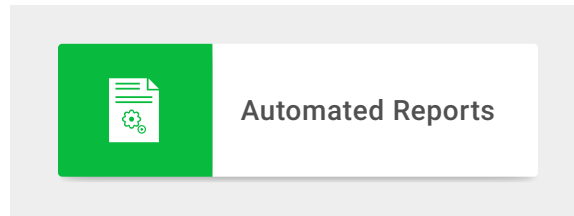
▶ Opened the Pursue Box

2

Ensure designated individual is checking Pursue Box daily!

- ✓ Ensure Office Managers are listening to calls for coaching and training purposes.
- ✓ Hold designated team members accountable for interacting with Call Box and viewing reporting metrics as intended.
- ✓ Verify Pursue Box is being opened and checked daily, at minimum.
- ✓ Determine when specific team members are logging in and how often.

RECOMMENDED AUTOMATED EMAIL REPORTS



Automated Reports allow Veterinarians 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 others in the office and collaborate on mutual priorities.

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



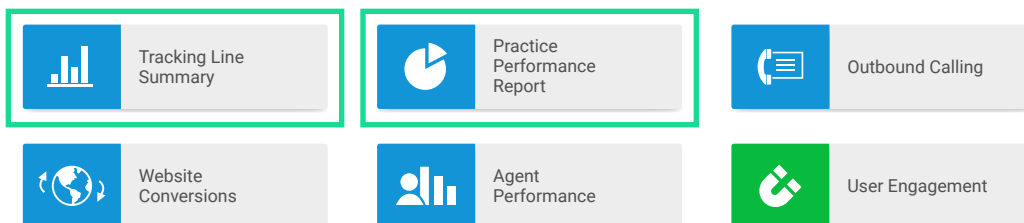
Build a new automated report

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

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.](#)

