



OFFICE 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 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**

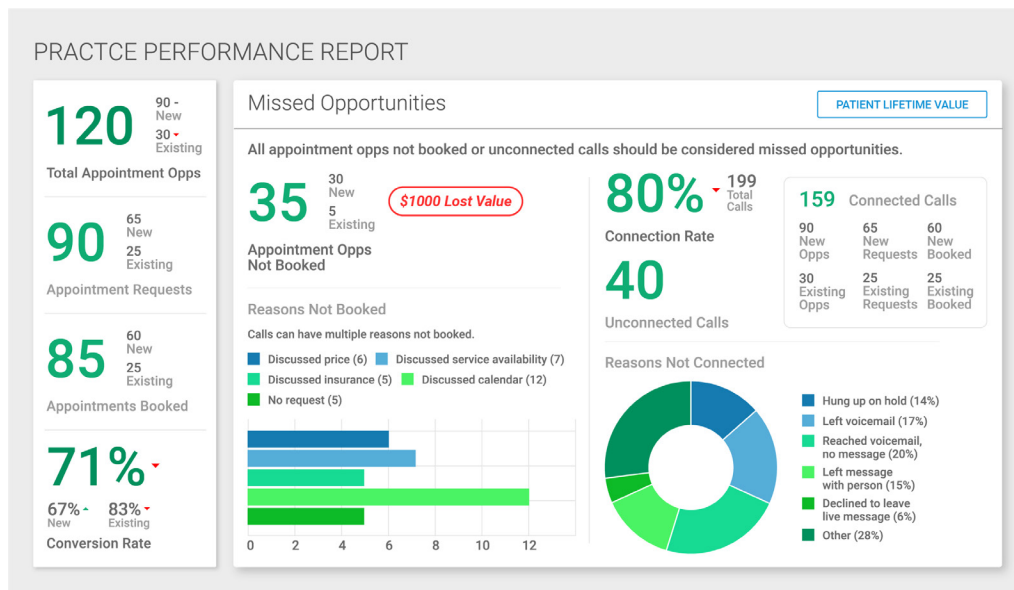
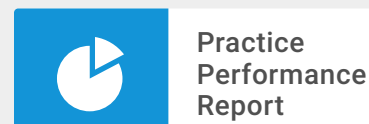
Office Managers use Call Box to hold staff accountable for their phone handling and track ongoing performance metrics. Call Box provides the necessary information for Office Managers to ensure marketing is driving the right amount and type of opportunities to the office via the phone. Office Managers should leverage Call Box's data daily, acting on missed opportunities from the previous day and assessing how the office is trending in asking for and booking appointments.

RECOMMENDED USER HABITS

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

PRACTICE PERFORMANCE REPORT

The Practice Performance Report focuses on highlighting appointment opportunities, bookings, missed opportunities, not connected calls, and a snapshot of marketing performance.




- ✓ Uncover trend-based insight that allows Office Managers to make actionable and educated improvements in phone processes.
- ✓ Discover how your practice is performing on the phones compared to past weeks or other practices.




- ✓ 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.

STAFF ACTIVITY

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



Staff Activity

STAFF ACTIVITY				
<div><div></div><div>#</div></div>				
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 to get ahead of any downward requesting and inviting or scheduling trends.
- ✓ Expand the date range to view trends to uncover staff that may be falling below performance standards.

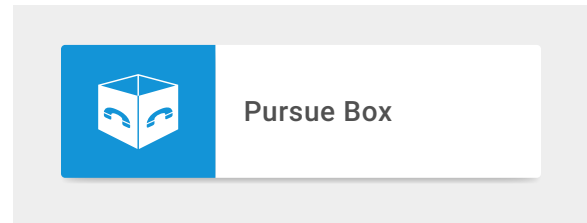
- ✓ Proactively pinpoint which team members may need additional coaching to ensure every appointment opportunity is converted into a booked appointment.



PURSUE BOX

Pursue Box holds unbooked patient opportunities that require prompt attention and should receive an outbound call to book a firm appointment. These opportunities include:

- Declined appointments due to scheduling conflicts
- Declined appointments without a reason given
- Callers who were not invited into the practice
- Callers who did not connect to someone at the practice



Pursue Box

2 Outstanding Pursue Opportunities

SEARCH ALL CALLS

< 1 OF 2 >

Thu, June 24 - 11:57 AM

Online Listings 214-555-0000 (ext. 2)
Voicemail no message

Taryn Keller

Customer Data
Customer Number: 214-555-1000

CUSTOMER INFO OPEN IN CRM

0:00 0:18

Thu, June 24 - 10:32 AM

Online Listings 214-555-1000 (ext. 3)
Voicemail no message

Mike Lawton

Customer Data
Customer Number: 214-555-2000
Customer Name: Julie Crawford

CUSTOMER INFO OPEN IN CRM

Call this patient back to recapture the appointment!

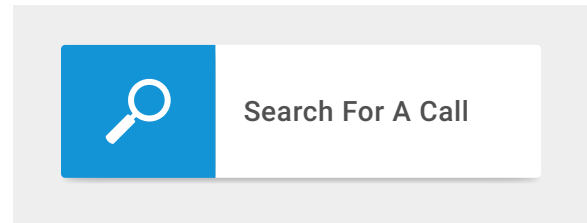
Unaddressed Patient Detection:

Detects and flags patients awaiting follow-up from the practice and requiring immediate attention. When a caller doesn't connect with someone who can help and hasn't received a follow-up call or text, the patient's missed call in Call Box is detected and flagged.

SEARCH FOR A CALL

Search for a Call allows Office Managers to quickly find and listen to calls that meet particular parameters. These parameters include:

- Agent who handled the call
- Call type and outcome
- Date range the call occurred
- Tracking line the call came in on
- Patient phone number
- Keywords identified on the call



Agent

☒ Don't Filter By Agent

☒ Ana Williams
☐ Andrea Smith
☐ Chastity Becker
☐ Denisse Kern
☐ Gloria Thompson

Tags

☒ Don't Filter By Tag

☐ Outbound Live Call
☐ Call in English
☐ Call in Spanish
☒ Appointment Opportunity
☐ Didn't Connect/No Message Left
☐ New Patient
☐ Left Voicemail

Advanced

Start date: 6/17/2019
Through: 6/21/2019
Customer phone #: 888-888-8888

Keyword Search
Any of these words: urgent, medicare
All of these words: reschedule, appointm
[ADD CUSTOM KEYWORD](#)

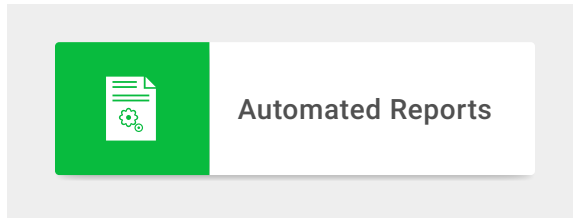
All Tracking Lines Selected
[SELECT TRACKING LINES](#)

FIND CALLS

Search Ana's appointment opportunity calls handled last week to pinpoint strengths and weaknesses.

- ✓ Search for both successful and unsuccessful calls and queue up recordings to play during weekly team huddles as prime examples.
- ✓ Pull call examples for staff members to hear what they sound like on the phone for ongoing coaching.
- ✓ Narrow down calls to only those that meet a particular search criteria to save valuable time whether for training purposes, marketing insight, patient complaints and more.

RECOMMENDED AUTOMATED EMAIL REPORTS



Automated Reports allow Office Managers to receive any of Call Box's reports or call alerts sent straight to their emails on a daily, weekly, or monthly basis. This allows them to track ongoing phone metrics in a convenient and consistent manner, as well as quickly follow up with any patients who require an outbound call. Automated Reports are easy to share with others in the office and collaborate on mutual priorities.



**DAILY, WEEKLY, OR
MONTHLY REPORTS**



**TRACK PERFORMANCE,
DRIVE RESULTS**



**EASY TO SHARE
AND COLLABORATE**



Call Box recommends Office Managers set themselves up to receive the following automated email reports and call alerts 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
This will also be the email subject line.

Recipients (0 Added)
Press Enter to Add Recipient

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

Using our AI Sentiment Detection Checkbox enabled with Individual Call Alerts

Filter By

TRACKING NUMBERS(0 Numbers Selected)

STAFF GROUPS(0 Groups Selected)

SUBMIT

 PRACTICE PERFORMANCE REPORT

 TRACKING LINE SUMMARY

 INDIVIDUAL CALL ALERTS

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.](#)

