



INTRO TO CALL BOX

FOR VETERINARY PRACTICE STAFF MEMBERS



WHAT IS CALL BOX?

Call Box is a phone skills training tool that helps veterinary practice staff members create a great experience for patients on the phone. Our program:



Pinpoints successes and areas of improvement to discuss in staff meetings.



Gives pointers on how to handle customer questions and objections to the appointment.



Helps you lead the conversation on every phone call to fulfill each patient's unique need and book more appointments.



HOW TO MASTER EVERY PHONE CALL

New patients calling into the practice view you as the expert and trust you to make them feel at ease. Call Box is here to help you do just that!

There are 4 main phone skills to master on every call with a new or returning patient.



C

CONNECT

Connect every call to someone who can help. This does not include answering a call and placing it on hold. A connected call is only considered connected when the caller's needs and questions were addressed by the appropriate person at the practice.



R/I

REQUEST/INVITE

Request the appointment / Invite the caller to come in every time. As a staff member at the practice, it's important for you to lead the conversation for the caller. Even if the caller seems like they are price shopping, extend the invitation to come into the practice.



S

SCHEDULE

Schedule an appointment for a firm date and time.cheduling the appointment can be difficult when coming up against patient objections. This is where it's most important to give the patient a choice for the appointment, as well as build rapport and share welcoming details about your practice.



P

PURSUE

Pursue every potential patient. Things happen – sometimes callers or opportunities to ask for the appointment will get missed. It's important to know how and when to follow up with patients to make sure they still get a great first impression of your practice.



WHAT DOES AN IDEAL CONVERSATION LOOK LIKE?

Here is your checklist for properly executing on every call with a patient. Keep this in front of you or taped to your computer at your desk while on the phone.

CONNECT

- ☐ Answer the call in under 10 seconds.
- ☐ State your name and the practice name.
- ☐ Place the caller on less than one minute hold, if applicable.
- ☐ Ensure that the caller reached their intended party, if transferred (*receptionist, doctor, tech*).

DIFFICULT SCENARIOS

1

You're currently on the phone with another patient

Keep the conversation to under 3 minutes on every call.

2

You're unsure if the doctor/tech is available to talk

Don't blind transfer the call! Ask to place them on a 60 second hold so you can walk over to check. Avoid transferring calls if there's a potential they will reach a voicemail. Take a handwritten message as a last resort, and ensure a timely call back.

REQUEST/INVITE

- ☐ Invite the caller into the practice.
- ☐ Offer at least two dates and times for the appointment.

DIFFICULT SCENARIOS

1

The call is regarding a general question or a price shopper

You can still offer the appointment! A patient is calling because they are interested in a service. If you make them feel welcomed, they will choose you over someone else, regardless of price.

2

The call is regarding a prescription refill, boarding, or a non-clinical call

Don't worry about asking for the appointment! Call Box mainly focuses on calls where there is an appointment opportunity available.

SCHEDULE

- ☐ Gather all important customer information for the appointment (*insurance, phone number etc.*)
- ☐ Set expectations for the visit to the practice (*we are located... once here, you will...*)
- ☐ Document the patient's appointment time and information in your internal system with proper notes.

DIFFICULT SCENARIOS

1

The patient doesn't have availability during the times you provided

Ask he or she when they are generally available. Make sure to take down the caller's information so you can call as soon as something comes available during that time.



HOW TO PROPERLY FOLLOW UP WITH A CUSTOMER

PURSUE

Follow up with patients within 72 hours who:

1

Did not connect because:

- Hung up on hold
- Hit voicemail, did not leave a message
- Left a voicemail
- Handwritten message (*or give it to the doctor/tech who needs to*)

2

Did not book an appointment due to:

- Price
- Appointment was not asked for on the first call
- Scheduling
- Other reason (*ex. Needed to talk to wife first*)

If you take notes on your initial call with the patient even if they don't book the appointment, you will have great rapport-building details to discuss on the follow-up call. Ex: *"How is Chester (cat) doing today? I wanted to check in with you about scheduling an appointment, we had something come available this afternoon!"*

WHAT IS THE VALUE OF CALL BOX?

At Call Box, our goal is to help your practice foster a positive and efficient patient experience on the phone. Make sure to continuously seek feedback and opportunities to improve your phone calls.

The 3 phases to implementing Call Box for training purposes at the practice are:

CONTINUOUS FEEDBACK

Trend-based strengths and weaknesses tracked consistently. Culture of accountability takes hold.

INSIGHT

Every phone call into and out of a practice is tracked and analyzed by live reviewers for overall performance.

ACTION

Data-driven opportunities identified for new processes and tangible improvements in the patient's phone experience.

Call Box is here to help you with any questions you may have, including questions about how to improve on the phone. **Ask your practice manager for more information, or reach out to your dedicated consultant at 972-362-1039.**