

Phone Skills Training Call Report

for

Laura Barney
Jenine Allen, DDS



Have Them at Hello!
Phone Skills for the Exceptional Practice

Date: August 3, 2005

Practice Name: Jenine Allen, D.D.S.
555 Theater Street
Napa, CA 94558
707-555-5555

Patient Name Used: Jenny Sanford
897 Piper Drive
Napa, CA 94558
707-942-0812

Request Being Made: Price of a crown; questioning experience with cosmetics

Appointment Date Scheduled: August 8, 2005 (cancelled at end of call)

Staff Member's Name: Laura Barney

Greeting: Number of Rings: 4 Excellent Fair Needs Improvement

"Thank you for calling Dr. Allen's office."

Recommendation: Add to greeting: "My name is Laura. How may I help you today?"

Welcome: Excellent Fair Needs Improvement

Caller said they were new to the area. Caller was not officially welcomed nor was there any attempt to connect with caller personally.

Recommendation: Actively listen for information that would allow you to make a brief personal connection with the patient (i.e., occupation, where they moved from and why, children, etc.) Always officially welcome to the practice at a minimum and to the area, if they are new residents.

Example: "I'm glad you called our practice, Mrs. Sanford, welcome. And welcome to Napa. What brought you here?... I know you'll love it here like we do. We're glad to have you. If there is anything I can help you with to get you settled in a little quicker, don't hesitate to ask!"

Referral Acknowledgement:

Excellent Fair Needs Improvement

Caller was asked toward the end of the call "How'd you hear about us?"

Recommendation: *This question is better to ask toward the beginning of the call in the introduction/rapport-building stage because it is easy to establish a personal connection around the answer and /or to start the assumptive close that this caller will become a good patient in the practice.*

Example: *"Who may we thank for referring you to our office, Mrs. Sanford?... Oh, Mr. Jackson! He's a favorite around here and he sends us the nicest patients. How do you know Mr. Jackson?..."*

Example: *"Oh, you saw us in the Press Democrat newspaper? We've met the nicest patients through that ad. What was it about the ad in particular that caught your attention?"*

Price Quoting:

Excellent Fair Needs Improvement

Caller was quoted the fee for a crown as soon as it was asked. No attempt was made to bring this patient in for a no- or low-charge evaluation.

Recommendation: *Refer to CD2 Tracks 3-5 and pages 10 & 11 in the workbook for skills on handling shopper calls and how to avoid quoting fees for treatment not being scheduled.*

Focus on Symptoms or Concerns:

Excellent Fair Needs Improvement

Laura did express concern for the patient's symptoms and did a good job of making her feel that she was concerned about her.

Recommendation: *Extend this skill further to create a sense of urgency for the patient.*

Example: *"Mrs. Sanford, that sounds like it could be serious and like something that Dr. Allen would definitely be concerned about. I know she would want to see you as soon as possible to take a look at that tooth."*

Sold Doctor/Practice:

Excellent Fair Needs Improvement

When the patient asked: "How is Dr. Allen? Is she a good dentist?", an assumption was immediately made that the patient was fearful and anxious about being hurt during treatment. If this was the patient's true motivation for the question, Laura did an excellent

job reassuring the caller of Dr. Allen's skill in this area. If it was not the patient's motivation, then Laura would have missed the target.

Recommendation: Ask more clarifying questions before answering a patient concern such as this one. Keep asking them until you are sure you have pinpointed the exact, specific concern. Then it is easy to answer this well and enthusiastically.

Example: "Dr. Allen is an excellent dentist. Was there something specific you were concerned about?"

Gathered Pertinent Information:

Excellent Fair Needs Improvement

Laura did a great job here in terms of the quality of details gathered. She gathered all information necessary to schedule an appointment, transfer x-rays, and process patient information.

Recommendation: These were some of the very first questions that were asked, long before an appointment was scheduled. Our recommendation is that the questions at the beginning of the call focus on determining patient needs, desires, and concerns so that an appropriate appointment or solution can be offered. Detail-type questions (i.e., social security numbers, birthdates, address, etc.) should be asked only after an appointment has been secured.

Promoted Financial Options:

Excellent Fair Needs Improvement

Caller did not ask this question and there was no discussion of payment options.

Recommendation: Methods of payment should always be promoted. A good time to do this is when the fee range for the appointment scheduled is quoted.

Example: "Mrs. Sanford, the fee for this appointment will range from \$75 to \$125 depending on the necessary x-rays. For your convenience, we do accept all major credit cards as well as several low- or no-interest monthly payment plans should you need treatment in the future."

Offered Appointment:

Excellent Fair Needs Improvement

Laura did eventually offer an appointment but there were many occasions to offer it sooner. She also inquired as to if the patient wanted to schedule now and what times/days would be good for her. This leaves the patient very much in control.

Recommendation: Always offer two choices to the patient for appointments which should be taken from a pre-determined block schedule. Always assume the patient will want to schedule. Never ask when or if they would like to come in.

Example: "Mrs. Sanford, Dr. Allen could see you for that appointment either tomorrow at 11:00 a.m. or Thursday at 9:30. Which would work better for your schedule?"

Gave Directions / Welcome Packet:

Excellent Fair Needs Improvement

Laura did a great job here! Very clear directions were given to the practice with exact mileage and landmarks. She not only told the patient to expect a welcome package but explained the added benefit of being able to fill out the forms in advance at their leisure to save time when she came for the appointment. Excellent!

Recommendation: None.

Reconfirmed Appointment / Re-sold Decision/Value:

Excellent Fair Needs Improvement

Laura did reconfirm the appointment time at the end of the call. She did not resell value or compliment the patient on their decision.

Recommendation: Especially if you have to really work hard to get a patient to decide to schedule an appointment (like this caller), always resell the value at the end (right before you are going to hang up) and compliment the patient's good judgment and decision.

Example: "Mrs. Sanford, I know this was a difficult decision for you but I'm confident that you've made the right decision. As I mentioned, Dr. Allen is an excellent dentist and I know you are going to be so glad that you came to see her. I'm really looking forward to introducing you personally to her on Thursday at 11:00."

Overall Attitude/Friendliness/Helpfulness:

Excellent Fair Needs Improvement

Laura had a very kind and warm tone. She seemed eager to help and was very friendly. The speed of her speech is quite fast and could be construed as being in a hurry.

Recommendation: The only recommendation would be to slow down the pace of your speech a little and to combine this natural friendliness with more control of the call and caller.

Additional Comments:

1. When asked, "Do you accept my insurance plan?" ... Laura just said, "No."
Recommendation: Review CD 2 Track 6 and page 10 in workbook for ideas on how to answer this question better and salvage patients that may not have insurance you accept.
2. Laura obtained the caller's name toward the end of the call when she was about to make an appointment.
Recommendation: Get caller's name at the beginning of the call and use frequently throughout the call.
3. The stealth caller stated that even though there were definitely areas Laura could work on, based on how she made her feel, she would have scheduled with this office. This is good feedback that your calls are generally good and can only get better!

Action List:

1. Review CD's and workbook particularly focusing on:
 - a. Handling shopper calls and fee questions
 - b. How to handle insurance questions
2. Improve initial telephone greeting.
3. Improve official welcome and make better, quicker personal connections with patients.
4. Ask questions at the beginning of call that determine caller's needs. Also, ask how they were referred and get patient name at the beginning.
5. Save "detail questions" for the last part of the call, after the caller has appointed.
6. When a patient has concern, ask more questions to clarify and focus your answer... before you answer.
7. Promote financial payment options and sell the practice a little more enthusiastically.
8. Offer two appointment times and always assume the patient will appoint.
9. Reconfirm appointment and compliment patient's decision to schedule right before you hang up.
10. Slow pace of speech.
11. Keep up the great work of getting better and better!