Magic: Mastering a Great Initial Call

by ***Elizabeth Conforti***

How many times have you been asked on a new patient phone call, "What's your magic wand?" Some parents and patients want to streamline the decision making process and find out why they should choose you without having to come into your office for an appointment. This does happen and it's best to be prepared for it. However, there is no singular answer. Your "magic wand" should be a compilation of qualities and actions that, when put together, are what makes your office so great!

Manage the initial phone call properly from the greeting. This is a basic skill that everyone who answers the phone should have. Answer with a genuine friendly hello and thank them for calling! Typical office hours for most practices are during the day when parents and patients work. So it is necessary to be grateful that they are taking time out of their busy day and choosing to call your practice. Do not use a script; if a team member needs a script then they should not be in a position to answer the phone. Utilize your technology for efficiency on the call. Edge and ViewPoint have several customizable fields that should be used when entering in new patient data. A well-managed and genuine phone call will leave a positive and exciting lasting impression – and your new patient will be one step closer to starting treatment in your office.

Attempt to make a connection with your callers so that you create a mutual bond together. Your new patient caller has a purpose for calling you, to schedule an appointment; however they also have choices to make. If a connection between you and your caller takes place, your earned result will be a more compliant patient that will likely not break appointments and may have one foot in the door of your practice already.

It is essential to connect with the caller on a level that leaves them feeling like they are part of your practice. How is that done? By being an excellent listener and asking great questions. Of course you need to obtain the general patient and responsible party data to establish your new patient, however, asking additional questions such as "How does your son/daughter feel about needing braces?" or elaborating on how they heard about your practice will provide you more patient insight. Pick up on conversation pieces such as their school or sports teams when class or practices are mentioned and compliment the connection. When you find out information, it becomes a powerful tool to use in building relationships and connections with your patients.

Then I recommend that you document this information in your notes section inside Edge or ViewPoint. This is a great way to communicate these connections to your treatment coordinator and doctor. By doing this, you are setting yourself up for success during the in-person greeting and the new patient exam experience. Engage in positive conversation with all callers and you will see the result in your schedule and in your practice. Connections are a reputation and relationship builder!

Great conversations happen while using complimentary words and enforcing good listening skills. Listen to the reason for their call and restate it so that you are in agreement with satisfying their needs. Focus on what you can do for the patient and parent versus what you cannot do. Omit from your conversation negative words and phrases such as "can't", "we don't", "unfortunately", "no", and "I don't have anything until".

When looking at the schedule together, give all callers your first two options. This is your initial attempt to schedule the patient by offering options. You will find that quite often, if you provide them two options, they will select one of them. If they ask for a time you don't have, or are unable to offer them, simply state that their requested time is not available and provide a reason why. Keep it

Reprinted from
The Newsletter for Members and Friends of Ortho2
October 2015 - Volume 33 Issue 4

brief and then follow up with alternative times and dates that you could offer them. Utilize up-coming days off of school if you are having difficulty scheduling. And remember, add all callers that need to get into your schedule sooner to your sooner if possible list. Treating all your patients like a VIP will enhance their experience with your office and will keep your schedule full.

Instructions are essential to ensure your patients and parents are compliant from the start. Set expectations of the appointment, clarify what paperwork you would like them to either fill out or download from your website, and confirm their email address for appointment confirmations and office communications. Preparedness is the key to any effective administrative system. Consider this portion of your conversation as your attempt to set all wheels in motion for the caller to join your practice. When you take the time to explain to your caller what they can expect by briefly outlining the appointment flow and informing them that the doctor is setting aside time for him or her in their schedule, you will have an understanding that will increase compliance. Emphasize the value of the appointment. Compliment your team and doctor so callers look forward to meeting them, and be sure that you have answered all of their questions.

Close the call with agreement and excitement. Your goal is to make them feel excited about coming in to meet the doctor and team. Many decisions are based on feelings so it is essential that your patients feel something positive when they speak with you. Thank them for calling your practice in a heartfelt and genuine way. Recap their appointment time, confirm that they know where you are located, that they should visit your online office, and provide them with your website address. Build up your practice and tell them how much fun or enjoyment they will have in meeting your doctor and team.

Your work is not over when the call ends. In fact, it has just begun! Enter all data into the notes section of Edge or ViewPoint to communicate with your treatment coordinator and doctor, be prepared with insurance verifications, and obtain X-rays when necessary to make sure you are fully ready for your new patient to arrive. And when they do, you are the gateway to the practice when sitting at the helm. Continue to roll out the red carpet for your VIPs to ensure their patient experience with you is second to none.

Your magic wand becomes how you treat people, how you are prepared, how you are focused on success, how you care about people, and how your systems will ensure they are well taken care of. On your next call…be magical!

About the Author

For more great ideas on how to propel your administrative team towards success, attend Elizabeth Conforti and Lori Parker's "Management and Marketing Masters Round Table Discussion" at the 2016 Users Group Meeting.