A patient of mine who specializes in relationship marketing explained to me that business is a really big funnel. At the top of the funnel we seek to attract as many interested potential clients (patients) from as many sources as possible. Some of the leads we have fall out of the funnel and don’t end up starting treatment with us. A savvy orthodontist/business person analyzes the business process from marketing to treatment start and seeks ways to turn the funnel into a cylinder. The number of “patient starts” you close depends on how well every member of the team nurtures a prospective patient from marketing effort to the close of the deal.

I attended an amazing lecture this last year that has changed the way I manage my business. John McGill said, “Orthodontists spend thousands of dollars in marketing to get the phone to ring only to have the phone call fumbled by untrained and incompetent office staff.”

In October of last year I updated my phone system. Now it records every phone call (inbound and outbound) onto a local hard drive in the office. What an amazing teaching and quality control tool for developing scripts and phone skills! I finally saw how much my phone was ringing and how my team was handling the steady stream of daily calls from prospective new patients.

**How It Is Set Up**

While I’m sure there is more than one way to set this up, this is what I’ve found to be the best yet most cost-effective solution for my office.

My phones system has five extensions (front desk, TC, billing, assistants and doctor). Four of these lines are connected to a PBX system that has a special USB module that interfaces four lines to a dedicated computer that serves as a digital voice recorder. The folder where the calls are recorded is a Dropbox folder. This Dropbox folder is accessible from anywhere under a secure username and password. The Dropbox service (free) allows the calls to be backed up and accessed from anywhere via the Internet.
Contact your IT/phone provider company to see what options are compatible with your phone system. The system I installed (www.integrate telecom.com) is an NEC device and has a USB interface that logs caller ID, extension, date and time and duration, and allows for tagging of calls with notes.

My TC looks up the new patients based on their ID numbering system. (We use Dolphin Management.) The first two digits of the ID number begin with the year 13 (2013) then the month 02 (February) followed by the patient 001-999. An example search of 1302 brings up 1302001-1302033.

The call log is first searched for the caller ID and the call is reviewed. The TC can then hear the caller in his or her own words rather than hope the scheduling coordinator filled out the intake form correctly, (though we still fill out the form). Inbound calls more than two minutes are typically calls where more information is exchanged. This is where I typically catch lost opportunities and develop scripts based on how I’d like the call to be handled. Additionally, the new patient’s status (as a new patient) is logged into the system when the employee creates a file for him or her. This event is time-stamped in the practice management system and calls can be searched by time.

Once you know the current state of your team’s phone skills, your staff needs time to start role-playing and training. Have your office call an out-of-state colleague and let him or her play the role of the parent of a potential patient. Let your colleague from out of town call your office with some hard questions. Give your colleague information such as the names of local referring dentists and local area codes, etc. to give validity to the call. Once your team expects to be mystery called frequently and graded, the quality of your calls will improve drastically. Play excellent calls back in monthly staff meetings. Develop grading sheets so that objective criteria can be enforced. Go online (Orthotown.com) and view our office’s grading criteria (Search: phone calls).

Legal Issues

As I have discussed recording employee phone calls with colleagues, I frequently get asked about legal issues. From my research I have found that laws about recording phone calls at a place of employment are dictated by state law. Some states are two-party states while others are only one-party states. A one-party state requires that only one party be aware of the recording (the employee). Two-party states require a recorded notification – “This call may be recorded and monitored for quality and training purposes,” – so that both the caller and the employee are notified that the call is being monitored.

See www.privacyrights.org/fs/fs7-work.htm#2a for details about your state’s restrictions.

You can’t begin to improve until you know the status of your current skills. Begin today by monitoring the phone skills of your team. You won’t be sorry!
New Patient phone call

What type of call is this?
Billing   Rescheduling   New patient   outbound purchase   Dental office request

What is our Goal(s) for this type of call? ________________________________________________

What is the other parties goal? ___________________________________________________________

What are the POSITIVE POWER WORDS used in this conversation?
“Great!” “Perfect!” “I’m Happy” “You’ve found Right Place” “You are going to love Dr. Curtis” “We are proud to offer” “What I’m going to do for you is_____”
Joy  Love  excited  proud  happy  glad etc.

What Negative statements or phrases were used?
No, Can’t, Not, Unfortunately, I’m sorry,

How friendly (on a scale of 1 to 10) would you rate the Curtis Orthodontic Staff Member?

How much energy and excitement does the staff member bring to the phoneline?
0 No pulse                               5 neutral                               10 take a chill pill (good)

How often does the staff member interrupt and talk over the patient?
Constantly   Frequently   Seldom   Almost Never   Never

Who is controlling the direction of the call?
The Caller?  The Staff Member?  Equal given and take

Does the staff member act like they are working for, with, or on behalf of the patient or as an adversary doing battle?

What Examples of Scripting did the employee use?

How long into the conversation was the office’s goal met?

How did the staff member do at turning a negative into a positive?
Amazing    Pretty good    So-So    Bad    Horrible    Lost opportunity

What is the overall Rating of the quality of the staff member’s phone skills?
0 Pretty horrible ➞ ---5 not bad not great ➞ 10 Amazing

**New patient phone CALL**  
Is the staff member READING intake form or is it a natural conversation about needed information?

Was other billing party invited?  
Was the office/Doctor talked up?  
Was the person invited to get to know us further website, Facebook, emailed forms?  
Does the person know why all of this information if necessary?  
Was the phone call office centered or patient centered?  
Were siblings invited to be seen?

**Scheduling**  
Did the staff member control the schedule or did they turn it over to the patient?

When do you want to come in?  VERSUS  My next available appointment is:  XXX or YYY Which works better for you?  
24 hour notice policy?  
Was Dr. Curtis’ name mentioned  “Dr. Curtis would like to see Johnny in 6 weeks”

**Billing**  
Is the tone positive but firm or is the tone negative and confrontational?  
Can the caller tell that you care more about them than their money?  
Does the caller understand what you have already done for them on their behalf?

**Recall**  
Was the word FREE, important, used?  
“Dr. Curtis wanted me to call because he was worried about Johnny”