



OPPORTUNITY IS CALLING



**Converting Calls into
Patients**



PHONE TRAINING

TRAINING OBJECTIVES

- 1. Evaluating Capacity vs. Demand
- 2. Best Practices to Reduce Lost Calls
- 3. Understanding the Anatomy of a Call
- 4. Improving Appointment Rates

You should never go to a meeting or make a phone call without a clear idea of what you are trying to achieve.
- Steve Jobs

CAPACITY VS DEMAND

Assess your capacity using appointment availability.

- New Patient Requesting Cleaning
- New Patient Emergency
- Existing Patient Emergency
- Existing Patient Recare Appointment
- Two-hour Restorative Appointment
- Scaling and Root Planing Appointment

FIRST IMPRESSIONS

CALL PRIORITIZATION

- 1. New Patients
- 2. Existing Patients
- 3. Paying a Balance
- 4. Other Doctors
- 5. Administrative Calls
- 6. Sales Calls
- 7. Family and Friends

PHONE TRAINING

PHRASES TO AVOID

ASSIGN OWNERSHIP

Who is primarily responsible for answering calls?

Who is secondarily responsible for answering calls?

How many rings before the phone is answered?

What hours/day are your phones being answered?

Do you answer your phones during lunch breaks?

IDENTIFYING A NEW PATIENT VS EXISTING PATIENT

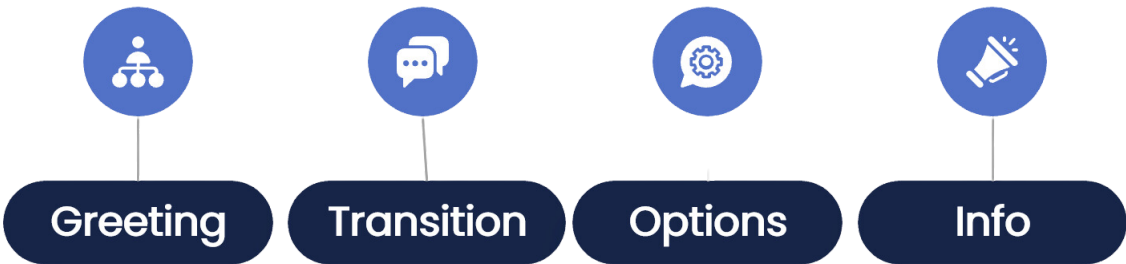
New Patient

- I am in pain, can you help me?
- What are your office hours?
- What days are you open?
- Do you make appointments after work?
- What is your earliest appointment?
- Where are you located?
- Do you take insurance?
- How long does an appointment take?
- What kind of treatment do you offer?

Existing Patient

- I would like to make a payment
- I have a question about my account
- I want to reschedule/cancel my appointment
- I have new insurance
- I want to confirm my appointment

ANATOMY OF A CALL



EXERCISE

Write down and practice your preferred practice greeting.

Write down the most common questions patients ask and how you would like to answer them going forward.

TRANSITION

Answer patient questions and transition them to scheduling the appointment.

- Provide 2 appointment options when possible.
- Use the patient's name at least twice.

EXERCISE

How would you answer "Are you in-network with my insurance?"

How would your answer facilitate the transition?

EXERCISE

Practice your greeting, questions and transitions for "I need a root canal" and then present options.

DATA CAPTURE

EXERCISE

Practice capturing data for a potential new patient with a painful tooth.

ELIMINATING BARRIERS

IMPROVING APPOINTMENT RATES

- 1. General Inquiry
- 2. Availability
- 3. Patient to Call Back
- 4. Price Quotes
- 5. Practice to Call Back
- 6. Insurance Not In-Network

NOTES

ACTION PLAN

- What are your next steps for implementing what you've learned?
- When would you like to these chances to take place?
- What is your plan for follow-up?
- Call Auditing
- Call Recording
- How will you measure success?
- How will you celebrate progress?

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