

# PREMIUM PRACTICE

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TODAY

# The Telephone

*An Integral Tool for Marketing  
Your Premium Practice.*



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*Premium Practice Today* is a monthly feature section in *CRSToday* providing articles and resources to assist surgeons and their staff in the pursuit of premium practice development to facilitate exceptional experiences for patients and business success.

# The Telephone: *an Integral Tool for Marketing Your Premium Practice*

Scripting potential scenarios is an important part of a successful call center.

BY CONNI BERGMANN KOURY, EXECUTIVE EDITOR

**P**remium practices must continually strive to improve the level of service they provide to customers. One often-neglected but essential area in need of enhancement is the call center.

Research conducted by SM2 Consulting (Pleasanton, CA) found that most practices do not properly handle phone inquiries from prospective patients, and thus they are not consistently converting these individuals to patients.<sup>1</sup>

According to Angel Misenhelter, a practice administrator for Brian M. Brown, MD, in Downey, California, “The first thing a practice should consider is putting the right people in the call center to answer and direct incoming calls and make outgoing calls.”

“Having the proper people staff the call center is the key,” Ms. Misenhelter said. “The individuals who answer the phone and make outgoing calls should have gregarious personalities, be courteous and cooperative, and have the ability to multitask. They should also have the ability to handle stressful situations.” She explained that more than one line in the practice may be ringing, the person answering the phone may be receiving overhead pages, and there may be upset patients waiting for assistance. The phone staff need to be able to pay attention to the caller without getting distracted.

“When the established patient has revealed his or her name, the staff member should locate the patient’s record—including the date of the last visit and other findings—in the practice’s patient management system,”

Ms. Misenhelter said. “The staff member can now respond more intelligently to the patient and shows the patient that each employee is aware of the patient’s individual situation. This will help the practice as it continues to build the relationship with that patient.”

## SCRIPTING AND REHEARSING CALLS

Developing scripts for employees in the call center is a very important aspect of managing the telephone in premium practices. The goal is to anticipate various scenarios, Ms. Misenhelter said.

“Preparing scripts and rehearsing them with the call center staff is important when speaking to new and established patients,” she explained. “Staff should speak to new patients differently from how they speak to established patients. New patients should be spoken to with confidence and told that their call is appreciated. Established patients should be addressed like a friend who has been missed. The tone should always be courteous and enthusiastic, at the same time striving to provide the best possible customer service to all callers.”

Although it is impossible to prepare for every call, a practice can develop general outlines for various situations. “For example, scripts should address patients who are calling specifically about LASIK or specifically about cataract surgery,” Ms. Misenhelter said. “Of course, phone staff should not provide too many details about available treatments, but their goal for refractive patients should be to get

### RESOURCES FOR TELEPHONE IMPROVEMENT

#### CareCredit

<http://www.carecredittip.com/>  
**Telephone Improvement Program**

A 3-year study revealed that most practices do not excel in converting calls to consultations.



In today's challenging economy, it is imperative that teams use the best communication skills possible to engage and encourage patients to come in for a consultation when they call the practice. To help practices enhance their phone skills and optimize opportunities, CareCredit has introduced the Telephone Improvement Program.

Featuring high-quality tools and resources proven to convert phone inquiries into scheduled consultations, the Telephone Improvement Program consists of two phases:

**Assessment.** The practice receives five professional "secret shopper" phone calls. An industry expert reviews the calls by listening for components critical to successful, effective phone skills.

**Training.** After the assessment, a customized training program (that includes audio programs and scripts) is developed and provided by a CareCredit practice development manager, a professional with significant experience in marketing and communications.

#### ExecTech

<http://www.exectechweb.com/>  
**Mystery Caller Front Desk Evaluation**



• ExecTech will evaluate a receptionist's telephone skills. An individual from ExecTech calls the office pretending to be a new patient. The person asks a list of easy and tough questions but will not set an appointment.

• An ExecTech consultant will then call the practice manager with the results, and the practice will learn how its receptionist rates on 10 qualities. The company will also provide suggestions of how to improve the practice's front desk skills.

• Of the 250+ Mystery Caller Front Desk calls ExecTech made last year, only 28% made ExecTech want to set an appointment. The rest were either uninterested (40%) or gave a bad impression (32%).

Visit ExecTech's Web site for more information and to set up a Mystery Caller Front Desk Evaluation.

#### OTHER RESOURCES

##### Allergan Access

<http://www.bsmconsulting.com/access-eye/accesseye.asp>

##### Strategic Planning

Significant changes in the delivery and financing of health care require providers to re-evaluate and re-engineer their systems, procedures, and strategies. Allergan Access' services include

- internal assessment of client's operations
- administration of staff and patient surveys with follow-up report



##### The Dijulius Group

<http://www.johndijulius.com/>

The Dijulius Group is the leading resource used by private and public organizations to create, develop, and improve their customer service systems, resulting in a healthier corporate culture, lower employee turnover, higher customer retention, increased average ticket sales, higher prices, more referrals, and, ultimately, making price less relevant. Top organizations across the globe use The Dijulius Group to create world-class experiences for customers every day.



##### SkillPath

<http://www.skillpath.com/>

SkillPath offers conferences to help build customer service skills, which are especially helpful on the telephone.



##### SM2 Stragetic, Inc.

<http://www.sm2strategic.com/sm2-ideas-in-action.asp>

SM2 Stragetic offers refractive surgeons an independent assessment of their customers' experience on both the telephone and during a consultation. For information on how to schedule this proprietary evaluation for your practice, send an e-mail to [info@sm2strategic.com](mailto:info@sm2strategic.com).



patients into the office." Phone staff also need to know when it is time to filter or hand off the phone call, she added.

The staff of the call center should be able to direct the caller to the appropriate person for assistance. When

transferring calls to other employees, the call center staff member should explain who the patient is and how he or she can be helped. "This will let the next staff member know what service he or she can provide for the patient,"

## What Do Fish and Dogs Know About Customer Service?

As of January 1, 2010, Center For Sight in Sarasota, Florida, switched from using an outside service for handling incoming LASIK and premium IOL inquires to answering these calls in the practice. "We now have a dedicated patient services coordinator who answers calls," said Becki Moyer, the director of patient relations at Center For Sight. "This person is educated on the procedures, equipment, facilities, and our physicians' experience, and she also understands the patient's flow through the system. She is fully prepared to answer patients' questions appropriately."

In addition to the coordinators who answer calls, Center For Sight employees a team of patient care counselors to provide comprehensive education for patients related to LASIK and premium lenses. Although the counselors typically are not clinical staff, every patient counselor at the practice is trained on the procedures and diagnostic testing, learns how to read the chart, and knows the basics of the clinical examination, Ms. Moyer said.

"They observe the procedures that we offer, and they know exactly what happens from the patients' perspective through their entire experience," she said. "Every cataract patient meets with the patient care counselor to be educated on lens options relative to the patient's lifestyle and to discuss risks and benefits of the procedure as well as basic education about cataracts and astigmatism," she added.

### PATIENTS' EDUCATION

The patient services coordinator—the individual who answers incoming calls from patients—has been through the same training as the patient care counselors, enabling her to respond with confidence to patients' inquiries.

"Counselors try to keep it simple and relate to the patient's needs," Ms. Moyer said. "They certainly do not want to confuse patients with the detailed technical aspects of a procedure, so they use a script to communicate the necessary information to the patient in layperson's terms. If a patient care counselor can-

not answer a clinical question, he or she seeks out the correct answer from a member of the clinical staff or a physician and then will follow up with the patient."

Scripts provide a base for the staff to work from, and they remind employees that they should greet the patient by name, introduce themselves, and focus on communicating very specific information to the patient in the patient's language specific to his or her lifestyle needs, Ms. Moyer said. Center For Sight also uses a process flow software application called Mind Map, which provides a protocol flow chart to assist the staff with patients' inquires.

At Center For Sight, the person taking these incoming calls is not responsible for making outgoing calls, so he or she is readily available to address patients' questions. The front office staff is responsible for scheduling and for following up with cancellations or rescheduling appointments.

### THE LASIK CALL

When handling an inquiry about LASIK, the patient services coordinator has been trained to at first tactfully sidestep the question of cost and explain what the practice offers and why the patient should choose the practice over a competitor.

"Patients will call and say, 'I am interested in LASIK. How much does it cost?'" Ms. Moyer said. "The coordinator will share that when comparing prices, it is important to consider the technology, the surgeon's expertise, training, and the facility, which will help them understand the value proposition of the procedure not simply the price."

Center For Sight offers global all-inclusive price packages as opposed to à la carte pricing, and the patient services coordinator must explain this to patients. "Discuss price last," Ms. Moyer said. "Education and product differentiation is first and pricing is secondary. Patients need to understand the important elements of the decision-making process, and that

Ms. Misenhelter said. "Having this information already communicated on the patient's behalf helps build relationships." She emphasized that staff should make such "warm" transfers standard and never offer a "cold"

(ie, unannounced, unexplained) transfer.

Scripts should include pauses for listening. "One has to listen to a patient's request in order to respond properly," she said. This point reflects a weakness revealed by most

price is definitely not the only factor."

Center For Sight draws from many different types of customer service training.

"We have taken concepts from training programs used by the Pike Place Fish Market [Seattle, WA]," Ms. Moyer said. "The ideas we have incorporated include things such as, have fun with your customers, be attentive, make their day, and choose your attitude every day when you come into work. These are some of the initiatives we are rolling out for our team members to remind them to pay attention and be 'checked in' when they come into work. This customer service model might have come from a fish market, but it applies to every business. Bring the patients into the positive attitude and they will have a better experience," she said. (See *World Famous Pike Place Fish Market*.)

Another staff-development initiative specific to the medical field that Center For Sight has used is a training program called "It's a Dog's World." It compares a hypothetical scenario in which a man and his dog have an accident.

"It's about customer service concepts such as caring, being present and accountable, and taking the initiative to get things done," Ms. Moyer said. "How people are treated and their experience make a huge difference in whether they come back to the

practice or not and whether or not they will refer another patient." (See *It's a Dog's World*.)

Ms. Moyer acknowledged that her challenge is to find a way to communicate to staff how important each and every one of them is to patients' experiences. "Part of my strategy is getting staff to think of being at work like being on stage," she said. "I want them to realize that everything they do and say is seen or heard by someone, somewhere. We must give our best performance every day."

No matter what an individual staff member's role is, the entire team should act as guest relations specialists. "The physicians understand that it's the patient's experience that builds the practice," she said. "People in medicine tend to take themselves very seriously. Yes it is a very serious job and we are dealing with serious matters, but our staff's primary role is to guide our patients through the experience and to educate them in a relaxed and comfortable environment. I believe that there is also an intimidation factor we need to overcome, and excellent customer service is the first step."

*Becki Moyer is the director of patient relations at the Center For Sight in Sarasota, Florida. Ms. Moyer may be reached at (941) 373-6236; bmoayer@centerforsight.net.*



### World Famous Pike Place Fish Market

<http://www.pikeplacefish.com/>

You can find us in Seattle's Pike Place Market, a historic, open-air market located in the heart of Seattle, Washington. People come from all over the world to see our world-famous crew of fishmongers throwing fish and having fun with customers.



### bizFutures

<http://www.bizfutures.com/index.html>

bizFutures Consulting Company is a transformational coaching and training company. Founded in 1983, bizFutures specializes in cultural transformation and self-generative



learning for organizations of all kinds. bizFutures' noteworthy coaching relationship with Seattle's World Famous Pike Place Fish Market has spawned an entire industry of training videos, books, business retreats, and workshops.

### It's a Dog's World

<http://www.crmlearning.com/its-a-dogs-world>

In just 14 minutes, you will never be able to view patient interactions the same way again! This light-hearted look through the "patient's perspective" bypasses typical viewer resistance and engages the imagination as a typical patient's journey is compared to his dog's treatment at the vet's office. An impossible-to-ignore viewing experience and customer favorite.





telephone research, which is that phone counselors fail to listen, because they are often too preoccupied with getting their message across. This is a huge mistake, according to experts.

## OUTGOING CALLS

Outgoing calls are another opportunity for marketing the practice and building relationships. There are several scenarios where the practice makes outgoing calls, such as recalls, patient no-shows, and cancellations without scheduling. "These calls are targeting individuals the practice is trying to get to return, so it is important to be considerate of their time," Ms. Misenhelter said.

A greeting and a thank you should be included in the script. It is important to remember that patients have a choice of whom to call. Phone staff should always introduce themselves, because it opens the door for patients to introduce themselves as well. "It is hard to build a relationship with someone without first knowing his or her name," Ms. Misenhelter said.

Phone staff may have to call an upset patient or make a difficult collection inquiry. Preparing scripts for these situations helps to keep the phone staff from fumbling and guessing what they should say. A well-handled encounter helps improve patients' experiences with the practice—even when they are asking for money!

It can be beneficial to allow the call center's staff to personalize the prepared scripts. "Be sure the staff know what the general points are that should be included in the phone call, but also let them know that how they address the points courteously is up them," Ms. Misenhelter said. "This allows staff to take ownership of the patient encounter and be more involved." The staff member will have a sense of pride knowing that he or she helped build the relationship that got the patient in the door.

## RESOURCES FOR IMPROVEMENT

Once the scripts are in place, the practice manager should "secret shop" his or her own practice.

"Practices should not only call themselves but also other practices to see how well they perform on the phone and for comparison," Ms. Misenhelter said. Secret shopping need not be limited to other premium ophthalmology practices, she added. "Call Nordstrom's or the Ritz-Carlton and listen to how their employees answer the phone." Those companies spend millions of dollars on training; a simple phone call may yield free pearls.

The CareCredit, Inc. (Costa Mesa, CA), Telephone

Improvement Program is one of many free sources to help improve phone skills and customer service. Once signed up for the program, a practice will be randomly secret shopped, and experts will rate and critique the staff's performance and offer suggestions on how to better their phone skills.

Membership in Allergan Access (Incline Village, NV) provides self-evaluations for practices and ideas for enhancing this important area of customer service.

## CALL CENTER

Practices should identify an area of their department for receiving calls (ie, the call center) and not allow the phone to ring throughout the clinic.

"If the practice has the front desk person answering the phones, who should receive the best customer service, the person already in the office (the established patient) or the new patient on the phone whom the practice is trying to convert?" Ms. Misenhelter asked. Both individuals are equally important, and they deserve to have a staff member pay attention to them and their needs.

Often, patients are not keen on leaving messages for the practice with an answering service, Ms. Misenhelter said. "Patients want to talk to someone in the office and are more willing to leave a message on the practice's own system." Phone trees should also be made as simple as possible (eg, for appointments, press one; for billing questions, press two; for LASIK and other refractive procedures, push three).

"The whole point is developing a relationship with callers to get them in the door and turn them into patients," Ms. Misenhelter said. "When they call after hours, thank them for calling, let them know they have called after hours, ask for their information, and let them know that a staff member will call them back when the practice reopens."

## CONCLUSION

One should treat patients the way one would want to be treated. "It really does boil down to that dictum," said Ms. Misenhelter. "Think about how you like to be treated as a customer and how you would like someone to treat your mother, your father, or your children. Then, develop a script and simply put it into action." ■

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1. Mahdavi S. Telephone Improvement Project Year 2 – Ongoing Assessment of Refractive Surgery Providers. Independent report. April 2007.