PHONE CALLS MATTER MORE THAN YOU THINK

How AI can and cannot assist your practice's call center.

BY BILL MERCIER

Year after year, ophthalmology practices focus on recruiting qualified personnel, adopting cutting-edge technology, and managing both declining reimbursements and rising operational costs. Effective strategies are essential to attract top talent across both medical and elective services and thereby ensure profitability. Optimizing call management is crucial to success because it directly influences revenue outcomes.

This month, I invited Bill Mercier of OptiCall to discuss the role of AI in call centers. The company's AI system draws on extensive data and experience to enhance practice efficiency and financial performance. OptiCall's 23 years of experience in patient handling set it apart, and the company is leveraging AI voices to boost efficiency in a way that only a seasoned veteran can. OptiCall's track record gives it an edge over newer companies just stepping into the AI voice arena and allows Bill to share useful insights with *CRST*'s readers.

— TRACY J. KENNIFF, MBA, OCS

L ast month, I watched a colleague lose a $10,000 refractive lens exchange patient because the practice's receptionist put the caller on hold for 3 minutes to "check something." The patient hung up and never called back.

This scenario is not unusual. In elective medicine, practices are competing not only on clinical outcomes but also on the patient's experience, starting with their first phone call. I have found that most practices falter on the experience side. AI technology can help—but it is not a magic bullet.

THE REAL COST OF BAD PHONE SERVICE

The uncomfortable truth is that, when patients call about elective procedures, they already feel nervous about spending money. Patients expect to move forward with insurance-covered treatments, but they must convince themselves twice to proceed with an elective procedure—first that they need it and second that they can afford it.

I have seen practices lose six out of 10 potential patients because their initial phone experience felt rushed, uninformative, or impersonal. That is a revenue problem, not a staffing problem.

The 30-second rule is not marketing fluff; it is reality. Patients decide whether to book a consultation based on how they feel after their first phone call. If your staff sounds distracted, cannot answer basic questions, or makes patients feel as if they are a nuisance, your practice has lost them.

WHERE AI HELPS, AND WHERE IT DOES NOT

Despite what AI technology vendors may tell you, AI cannot solve all your call center's problems. Used correctly, however, the technology can alleviate some of the pain points that have been driving your practice administrator crazy for years.

Training

Traditional staff training for medical calls is generally ineffective. Trainees role-play a few scenarios, shadow someone for a week, and then hope for the best.

AI can improve staff training by analyzing actual patient conversations instead of hypothetical ones. I have seen practices cut training time by one-third by using AI systems to pinpoint which phrases are effective. Gone are the guesses about why one staff member converts more patient inquiries into consultations than another. For example, if Sarah's conversion rate is 40% higher than Mike's, AI software might reveal that she says, "help you see clearly again," whereas he says, "improve your vision."

The technology does not replace the human judgment needed for training; it simply provides actionable insights.

Real-Time Support

When patients call your practice with a straightforward question, they do not want to be put on hold while someone "checks with the doctor." AI-powered knowledge systems can feed answers about procedural details, pricing tiers, and financing options directly to your staff during calls.

The technology does not replace human expertise. Instead, AI can instantly provide basic information so your team can focus on addressing patients' concerns and building rapport instead of fumbling through reference sheets.

The Boring Stuff

About 40% of the calls that most practices receive are routine scheduling tasks—confirmations, rescheduling requests, and basic questions that do not require human expertise. AI can handle these and free up your best people for more meaningful conversations. That said, callers should be able to reach a human being easily when they need one.

AI works for routine tasks. It fails when people have complex concerns or need reassurance.

WHAT PATIENTS WANT

Research has consistently shown that patients value empathy over efficiency.[1] They want to feel heard, understood, and cared for—especially when they are nervous and paying out of pocket for a procedure.

The practices I see implementing AI successfully use it to improve staff performance, not to replace employees.

ECONOMIC CONSIDERATIONS

Good AI systems are not cheap, and implementation requires time and training. The staff time required to learn new systems and workflows is an additional factor.

If, however, your practice is currently losing two or more patients per month because of poor phone experiences, the return on investment is straightforward. A single vision correction patient typically generates more revenue than several months of AI system costs.

The big question is whether your team is ready to embrace AI. The technology works only when used properly.

ON THE HORIZON

The AI capabilities improving the fastest are natural language processing and integration with practice management systems. Soon, AI-equipped systems will be able to access patient histories, insurance information, and scheduling in real time during calls.

The fundamental dynamics of patient interactions, however, will not change. Patients want to speak with someone who cares about their concerns and can guide them through important decisions. AI is being improved to support rather than replace human interactions.

TIPS ON AI INTEGRATION

If you are considering AI for your call center, start with an honest assessment of current problems. Are you losing patients because of long hold times, because staff cannot answer questions, and/or because routine calls are overwhelming your team? Different problems require different solutions.

Do not implement AI technology just because it exists. Adopt it only if it can address a specific problem that is costing your practice patients or revenue.

Most importantly, remember that your patients are making important decisions about their health and appearance. They deserve thoughtful, knowledgeable, empathetic service. AI should make that easier to deliver, not harder.

The practices I see thriving are not the ones with the most technology but those that use technology thoughtfully to create better patient experiences. That requires a distinctly human skill that no AI system can replicate. ∎

1. Cultivating empathy in healthcare: how kindness transforms care. Performance Health Partners. April 21, 2025. Accessed July 2, 2025. https://www.performancehealthus.com/blog/cultivating-empathy-in-healthcare

SECTION EDITOR TRACY J. KENNIFF, MBA, OCS
- Ophthalmic Consultant, Vision Profits Unlimited, San Antonio
- tracyk@visionprofitsunlimited.com
- Financial disclosure: None

BILL MERCIER
- President and CEO, OptiCall, University Park, Florida
- bmercier@opticall.com; www.opticall.com; X @Opticall
- Financial disclosure: Employee (OptiCall)