

Reviewing Phone Protocol

The importance of
maintaining these skills
is immense.

BY LYNN HOMISAK, PRT



To Our Readers: *There are no foolish questions. Chances are that if you have a question or concern in your practice, others are experiencing a similar situation. We're here to help. PM [doctor and staff] readers are encouraged to submit questions to lynn@soshms.com which will be printed and answered in this column anonymously.*

Subject: Reviewing Phone Protocol Is Never a Waste of Time

Dear Lynn,

It's clear to me that (in the midst of this pandemic slowdown) now is a good time to make sure that many of my current operations are functioning in the most effective way possible, starting with the phone. I can't always be right there to listen to how my staff handles appointment and patient questions. I wonder if they are doing everything to ensure the best customer service and that patient phone calls are being converted

into appointments. Should we have a phone training session? Where would I start and what should I include?

Patient phone calls are the first person-to-person encounter patients have with your practice. In micro-sec-

that your staff seemed unfriendly or uncertain.

Patient: "I'm calling to see if Dr. Foot sees new patients."

Receptionist: "We welcome new patients, Mrs. Jones. What seems to be the problem with your feet?"

In micro-seconds, you, the staff, and your practice are judged based on the caller's initial phone call.

onds, you, the staff, and your practice are judged based on the caller's initial phone call. A positive experience will successfully lead to their making an appointment. If, however, their response is, "I'll call back," or "thanks for your time," there was likely a disconnect somewhere and you've probably (unknowingly) lost that patient. Why? Perhaps it was because the patient felt rushed or unimportant; that their concerns were minimized; or

Patient: I have terrible heel pain—it keeps me up at night!"

Receptionist: "Well, you've called the right office. Dr. Foot specializes in relieving heel pain. I am happy to schedule an appointment for you to see him. Is there a day/time that works best for you? I have an opening this Tuesday in the afternoon or on Thursday in the evening. Which would you prefer?"

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When hiring new, or questioning existing staff on their phone abilities, it's very likely they will tell you that they have "excellent phone skills". But what if it turns out they don't? Doctors who willingly hand over such a critical tool to their staff without making phone training a mandatory (pre)requisite for the job should consider the associated consequences. Poorly trained or untrained staff can account for a loss of 20-30% of potential new patients on the first phone call to your practice. This can wind up costing many thousands of dollars a year in lost revenue.

To ensure that staff are handling your phone professionally and to your specifications, make time to have that important discussion. Schedule an office staff meeting making telephone awareness your only agenda item. Insist that all staff (not just receptionists) participate for consistency throughout the office.

While the following list of phone guidelines may seem fundamental, never underestimate how reviewing and reaffirming standardized operational procedures through a regular training process will produce valuable results. Use this as a checklist. How many of these are your staff doing first time, every time?

The close of each call is just as important as the greeting.

- SMILE as you answer each phone call. Patients can hear it in your voice and if the smile is NOT there, they can hear that too! Taping a smile button or a small mirror on all phones serves as a helpful reminder.

- Greet politely, identify the practice and your name, and ask, "How may I assist you?" One (non-medical) company answers their phone in this unique way, It's a great day here at (business). My name is (Caitlin). How can I help make your day better?" Her voice is as clear and pleasant as her message. Impactful.

- Identify what patients are calling for and move towards making

an appointment. Get them in the schedule first; then address additional questions.

- Develop a written protocol and scripted responses for help in screening various types of calls or how to properly respond to common questions that patients ask (i.e., patient returning the doctor's call, calling for an appointment, calling with



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billing or insurance questions, etc.). Role play (a very effective learning tool) these scenarios during your next staff meeting. Doing this as a group exercise coaches everyone in the office on how to provide consis-

tent, accurate responses.

- Use your best "telephone" personality qualities—voice clarity (slowly, clearly, and friendly), active listening, competent, knowledgeable, helpful, positive, empathetic, courteous, and sincere, just to name a few.

- Use the patient's name often—e.g., "What seems to be the problem with your foot, Mrs. Jones?" "Thank you for calling, Mrs. Jones."

- For more accurate time allotment and schedule placement, probe the caller for more information. "Are there any other foot problems you'd like the doctor to examine while you are here?"

- Before placing patients on hold, always ask first—"May I...?" And wait for their response.

- Staff should never offer medical advice to patients, unless they are relating information directly instructed by the physician. They do not have a license to practice medicine.

- Absolutely NO negativity, irresponsibility, accusations, or blame, at any cost. Turn a negative into a positive. Instead of "I can't", or "I'll try", offer your assistance: "What I CAN do is..."

- Respect timeliness of calls. Too short and you seem disinterested. Too long and it may be redundant, cause back-up, take you away from other tasks, and put unfair burden on a co-worker.

- Create and follow written policy regarding current COVID-19 protocol, quoting fees, Medicare coverage issues, walk-ins, late patients, emergencies, co-pays, patients who arrive without a referral, etc. With few exceptions, follow your own policy!

- Keep a cancellation list for pa-

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THE CONSULTANT IS IN

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tients waiting to be seen. As long as you follow through, this is a great opportunity to pacify anxious patients when a sooner appointment is unavailable.

- The close of each call is just as important as the greeting. Before ending the call, be sure to ask if the caller has any questions; repeat day and time of appointment; thank them for calling, say goodbye and WAIT for them to hang up first.

Thank you for submitting this question. As Thomas Jefferson said in the popular Hamilton production on stage and screen, “And if ya don’t know, now ya know.”

Subject: Management 101

Dear Lynn,

Some quick management tips to help me be a better boss. Please. Hurry.

1) The first rule of management: “Everything is your fault.” Some words of wisdom (from A Bug’s Life).

2) Offer guidance. Don’t ignore the benefits of a performance review to help staff be first-rate employees.

3) Have an open door policy that allows employees to feel comfortable coming to you with their concerns.

4) Refrain from micromanaging ... as best you can.

5) Do not show favoritism among your staff. Treat everyone fairly, as equals.

6) Be aware of and verbalize appreciation of tasks performed well. Say thank you.

7) Request employee feedback and don’t get offensive at negative remarks. It only makes you a better manager.

8) Don’t ask employees to do anything that you wouldn’t do yourself.

9) Listen to their ideas.

10) Have a sense of humor—having fun at work is not a bad thing. In fact, it’s motivating.

It’s good that you want to get a handle on this because poor management does affect office morale AND your bottom line, with costs ranging from the loss of good employees, rehir-

ing (advertising, recruitment, time spent correcting errors, training, screening, interviewing, transition, paperwork), and decreased productivity. **PM**



Ms. Lynn Homisak, President of SOS Healthcare Management Solutions, carries a Certificate in Human Resource Studies from Cornell University School of Industry and Labor Relations. She is the 2010 recipient of Podiatry Management’s Lifetime Achievement Award and was inducted into the PM Hall of Fame. She is also an Editorial Advisor for Podiatry Management Magazine and is recognized nationwide as a speaker, writer, and expert in staff and human resource management.
