

Making the Most of the Phone

By Kay Huff

Every single day I have conversations with my clients about incredible hospitality, a welcoming and positive attitude, creating a high level of engagement, and developing an ear for great listening. I sound like a broken record reviewing the fundamentals with doctors and their teams. I typically have a lot of confidence that folks are “getting” the message. And then we test our progress only to learn there is still so much to learn. Most practices have worked on, and will continue to work on, *basic phone skills*, as long their doors are open.

Even though most offices do work on phone policies, they don't usually take time to listen to how effective phone etiquette actually is. Even if they do, the majority of doctors and team members truly don't know what an *exceptional* phone experience can be. This means team members can't coach themselves nor can they effectively coach each other. The general population typically finds professionals on the other end of the phone are “quick, rude, distracted, and uncaring.” If that's true, where is the model for us to train our teams to be extraordinary?

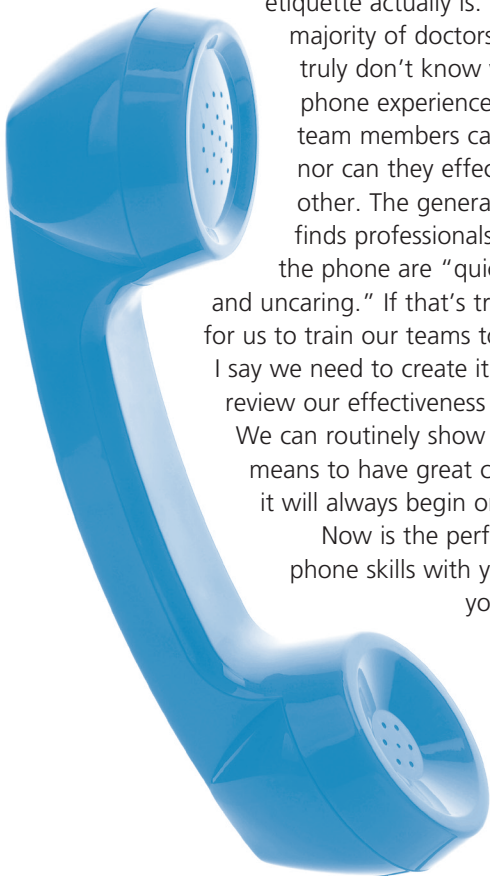
I say we need to create it ourselves ... and review our effectiveness over and over again. We can routinely show our patients what it means to have great customer service, and it will always begin on the phone.

Now is the perfect time to revisit basic phone skills with your entire team. I invite you to practice with each other, listen to each other, and if you are feeling very brave, record as many calls as you can.

My hope is you consider each step below as a new opportunity to WOW the next person who calls. Even the best of the best can keep getting better as they work to make each and every call fresh and special.

- 1 Be prepared and happy to answer the phone. The phone is not an interruption to your day. *Every time the phone rings there is an opportunity waiting on the other end.* You get to make a choice every time it rings about the energy and intention you will give the person calling. Treat every call as though it is the most important call of the day.
- 2 SMILE when you answer the phone! There is a reason you've heard this one 10,000 times already and that's because the impact is real. People CAN feel your smile; and even if they can't, it will help you feel better about yourself. It will also show anyone who happens to be watching that you are enjoying yourself. Whether we like it or not, the phone is typically in a place where patients can see the person answering. What a great opportunity to demonstrate the positive culture you are working so hard to develop!
- 3 Be sure you are slow and clear with your salutation so the caller can understand you. Most people answer so fast it's hard to hear the business name and even harder to hear the person's name. Answering the phone is not a race.
- 4 Please don't answer the phone and immediately put the caller on hold. “Dr.'s office, please hold” is the opposite of exceptional service and does nothing to build rapport or relationship. I know there are many reasons it might seem like the only solution, but I promise you there is always an alternative. Note: there is an appropriate way to put people on hold if you need to. At the very least, find out to whom you are speaking and ask permission before parking them.

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- 5 As early in the conversation as possible, get the caller's name and then use it. It's not important to use their name in every sentence, but it is important to use it. Everyone responds positively to recognition and acknowledgement, and we want our callers to feel good about themselves when they have contact with our office.
- 6 Let the caller know you are happy they called, and when it is appropriate help them know they have called the right place. As the first point of contact for many of these callers, you are also the "first cheerleader." As for your existing patients, it is fun and rewarding to remind them you are pleased to take care of any of their needs and they are getting the best possible care by the best possible team. Your enthusiasm and positive attitude must be a constant throughout the entire call. (Of course you will learn how to modulate and flex based on the content of the conversation.)

- 7 As the person answering the phone, it is also your responsibility to be the queen (or king) of possibility. Do everything you can to have a positive response to any question. For example, if a patient asks if you are "on my plan," you can respond by saying you work with many plans and you are happy to help them understand how you might work with theirs.
- 8 As soon as possible, begin asking questions. "Kirk, tell me about what prompted you to call today" or "Tell me how I can help you today." Help the patient know you are interested in them and in their story.
- 9 Practice Reflective Listening throughout the call. This means repeating back questions or reflecting back data or parts of the patient's story. This is always an effective communication tool and it's even more important on the phone since you don't have the benefit of eye contact or body language to help connect.
- 10 It is tempting and easy to do most of the talking, especially with a new patient. Your most effective calls could be the ones where you learn as much as possible about the other person. This only happens when they are the ones doing the talking.
- 11 Do what you can to schedule an appointment (obviously when appropriate). Know the different ways for new patients to join your practice including a Meet & Greet for those who may not be certain about their wants or needs.
- 12 When closing a call, review the key points. Use the patient's name when saying goodbye and remind them what your name is. Ask them to call you personally if they have any additional questions, and thank them once again for calling. If the person on the phone can feel your care, then your call was a success.
- 13 Consider a follow up call or note to make your WOW even bigger!

Creating the exceptional phone call experience will come easily and naturally for many people. Hopefully, the person/people who are responsible for the majority of calls to your practice love the opportunity to be on the phone and will enjoy the challenge.



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