A patient of mine who specializes in relationship marketing explained to me that business is a really big funnel. At the top of the funnel we seek to attract as many interested potential clients (patients) from as many sources as possible. Some of the leads we have fall out of the funnel and don’t end up starting treatment with us. A savvy orthodontist/business person analyzes the business process from marketing to treatment start and seeks ways to turn the funnel into a cylinder. The number of “patient starts” you close depends on how well every member of the team nurtures a prospective patient from marketing effort to the close of the deal.

I attended an amazing lecture this last year that has changed the way I manage my business. John McGill said, “Orthodontists spend thousands of dollars in marketing to get the phone to ring only to have the phone call fumbled by untrained and incompetent office staff.”

In October of last year I updated my phone system. Now it records every phone call (inbound and outbound) onto a local hard drive in the office. What an amazing teaching and quality control tool for developing scripts and phone skills! I finally saw how much my phone was ringing and how my team was handling the steady stream of daily calls from prospective new patients.

**How It Is Set Up**

While I’m sure there is more than one way to set this up, this is what I’ve found to be the best yet most cost-effective solution for my office.

My phone system has five extensions (front desk, TC, billing, assistants and doctor). Four of these lines are connected to a PBX system that has a special USB module that interfaces four lines to a dedicated computer that serves as a digital voice recorder. The folder where the calls are recorded is a Dropbox folder. This Dropbox folder is accessible from anywhere under a secure username and password. The Dropbox service (free) allows the calls to be backed up and accessed from anywhere via the Internet.
Contact your IT/phone provider company to see what options are compatible with your phone system. The system I installed (www.integratelecom.com) is an NEC device and has a USB interface that logs caller ID, extension, date and time and duration, and allows for tagging of calls with notes.

My TC looks up the new patients based on their ID numbering system. (We use Dolphin Management.) The first two digits of the ID number begin with the year 13 (2013) then the month 02 (February) followed by the patient 001-999. An example search of 1302 brings up 1302001-1302033.

The call log is first searched for the caller ID and the call is reviewed. The TC can then hear the caller in his or her own words rather than hope the scheduling coordinator filled out the intake form correctly, (though we still fill out the form). Inbound calls more than two minutes are typically calls where more information is exchanged. This is where I typically catch lost opportunities and develop scripts based on how I’d like the call to be handled. Additionally, the new patient’s status (as a new patient) is logged into the system when the employee creates a file for him or her. This event is time-stamped in the practice management system and calls can be searched by time.

Once you know the current state of your team’s phone skills, your staff needs time to start role-playing and training. Have your office call an out-of-state colleague and let him or her play the role of the parent of a potential patient. Let your colleague from out of town call your office with some hard questions. Give your colleague information such as the names of local referring dentists and local area codes, etc. to give validity to the call. Once your team expects to be mystery called frequently and graded, the quality of your calls will improve drastically. Play excellent calls back in monthly staff meetings. Develop grading sheets so that objective criteria can be enforced. Go online (Orthotown.com) and view our office’s grading criteria (Search: phone calls).

**Legal Issues**

As I have discussed recording employee phone calls with colleagues, I frequently get asked about legal issues. From my research I have found that laws about recording phone calls at a place of employment are dictated by state law. Some states are two-party states while others are only one-party states. A one-party state requires that only one party be aware of the recording (the employee). Two-party states require a recorded notification – “This call may be recorded and monitored for quality and training purposes,” – so that both the caller and the employee are notified that the call is being monitored.

See www.privacyrights.org/fs/fs7-work.htm#2a for details about your state’s restrictions.

You can’t begin to improve until you know the status of your current skills. Begin today by monitoring the phone skills of your team. You won’t be sorry!