

# Telephones

## The Most Overlooked Piece of Equipment in an Optometric Practice

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The telephone is the single most important instrument in your practice. Mishandle this instrument and your practice growth can stop.

So the question is – who represents you on the phone? If you're like most practices it's the least experienced person on staff. So what you've done is to put the long term health and growth of your practice in the hands on the least knowledgeable and often lowest paid staff member.

Ask yourself - what happens when a call comes into my office? Is it answered promptly? Is the correct information given? What is the attitude of my staff member? Is my appointment book full? All of these areas impact your practice health. Do you know what's happening?

Take the time to prepare and educate your staff on exactly how you'd like the phone to be handled. Create a handbook for the front desk that covers the basics and add complexities as the staff becomes more experienced.

Your basic handbook should include:

**Abbreviations:** (examples)

CE – comprehensive exams  
VA – vision analysis  
CLCK contact lens check  
FU follow up examination  
NP New patient  
EP Establish patient  
VF – Visual Field

**Insurances accepted:** (examples)

All must have prior authorization 2 days before exam date

VSP - Vision Service Plan  
Davis  
Eyemed  
Med i cal

**Payment Policy:** (recommended)

All fees are due at the time of service.

Custom orders will be placed AFTER 50% deposit or full payment

**General Doctor Information:** (example)

Dr. Schmidt graduated from UC Berkeley in 1987.

Her area of specialty is Orthokeratology.

She has written two articles for the “Contact Lens Spectrum”

Office Hours:

Mon – Fri 8:30 AM – 5:30 PM

Thursday 10:00 AM – 7:00 PM

Saturday 09:00 AM – 12:00 PM

**Directions:** (example)

Office address:

123 Main Street

North or southbound on highway 80 take the Main Street Exit head North. We’re up 1 block on the right side of the street. Parking is in the rear.

Here are the basics techniques the staff should be capable of performing:

**Answer with the first 2 rings.**

If the phone is ringing more the 2 times – the patient begins to perceive that the practice as too busy to meet their needs.

Everyone on staff not working directly with a patient should consider the phone their priority.

If you phone often rings more than twice you may not properly staffed at the front desk. Remember the phone and front desk are the first impression of your practice. How staff behave and handle this situation will directly result in patient behavior. The goal is to make your patient feel important to and valued by the practice. A timely and professional greeting will go a long way in achieving that. Consider evaluating your call volume and adding more staff to handle the work load.

## **Smile**

You can hear a smile through the phone. The impression you want to give is a happy staff member who enjoys what they do.

## **Introduce the practice name**

This is part of the branding and image of your practice. Remember there are 5 – 7 seconds to make a positive impression on the phone. How the staff pronounces and announces your information will either confirm what the patient expects or confuse them. Your phone staff will need to present the image from your internal and external marketing programs. Decide what image you want to project then communicate that to staff. Is your image clinical, technical, warm, friendly, retail, professional or family oriented?

## **State your name**

This is very important in building patient rapport. When a patient feels a connection to the person on the phone, they are less likely to cancel appointment or worse yet no show. As a frequent caller to your practices I can tell you it's rarely done. This is a simple way to improve the initial contact with your patient, new or established.

## **Speak distinctly**

A basic component of good telephone techniques is to be easily understood. Train each staff member to slow down when working on the phone with patients. Don't talk too fast or slur words together.

## **Don't eat, chew gum or drink**

Have you ever talked on the phone with someone was sucking on a piece of hard candy? Not a pleasant sound. Maintaining the image of the practice begins at the phone. Discourage all food or drinks in the front desk area. It's unprofessional and a risk to computer components.

## **Listen to what the caller is saying**

Do not interrupt when the caller is speaking. Even if you know what they're about to say. It's disrespectful and will alienate the caller. Occasionally you will need to redirect the caller back on track but be careful and use this method sparingly. Remember the goal of the call is to market the practice and build rapport.

## **Take notes**

Keep a pen and paper handy. As soon as the patient states their name – jot it down. Use their name in the conversation as soon as you can. Any insurance information or additional details that might be helpful to the doctor or technician, you can jot down and enter into the note section of the appointment schedule. Personal observation would be inappropriate in this area but data or relevant patient information is fine.

## **Cultivate a courteous and friendly attitude**

This is a mandatory behavior for the front line staff at any practice. We all have bad days but when you pick up the phone you're an actor in a play or TV show. No one should know that you've had a hard day. Your "role" is to present an image that properly represents the office.

## **Watch your language**

Be careful when using too much technical terminology that may confuse a patient. Words like, refraction, toric, hyperopia or insurance lingo will create a barrier to the patient and negatively impact the call. If you want to use the correct terminology when speaking with a patient, make sure you quickly clarify and define it for the patient. Such as, "refraction" is when the doctor checks for your prescription, you know the which one is clearer one or two test, one or two."

Obviously there is never an appropriate time to use profanity.

## **Apologize for all errors and delays**

Even if it's not your fault, always start with an I'm sorry. Hopefully you are sorry for any inconvenience a patient experiences so you can apologize with sincerity. "I'm so sorry this has happened; let me see what I can do to help."

## **Keep your promises**

If you offer to research a delayed job and call the patient back. Call them back! Sometimes it may take you only one minute or one entire day to gather all the information and give the patient an answer. If it will take more than a few minutes offer to call the patient back with an update or an answer. Even if the answer is; you've got a call into the representative or a manager to get more accurate details and you'll call the patient back by the end of the day. Sometimes keeping people updated is as important as the final resolution, no one likes to be in the dark.

## **Treat patient with respect**

That's really the point I made in the last paragraph. Respecting patients, time and need to know information will result in a more cooperative patient who is committed to the practice.

## **Hold Button Etiquette**

Ask the patient if they are willing to hold and wait for the answer. People will be stunned that you were courteous and waited for their response before pushing the hold button.

When you pick up a call that's been on hold always thank the caller for holding. Introduce or re-introduce yourself and when possible state back to them the nature of their call. It is frustrating for callers to have to repeat themselves.

No patient should be on hold for more than 30 seconds. If you regularly have patients are on hold for longer than 30 seconds, either than desk is understaffed or poorly trained. Always offer to call a patient back rather than leave them on hold while you track down information. If you phone them back within 2 minutes you're amazing, if their on hold for 2 minutes you're incompetent.

## **Thank callers for calling**

Each and every call should end with a sincere thank you for calling the practice, especially if the call is to reschedule or cancel an appointment. There is nothing worse than an unexpected opening in the schedule.

At the completion of the call, ask the caller if they have any additional questions, if necessary answer them. If there are no more questions, restate the exam day, date and time and thank the caller for calling.

Thank you for taking the time to refresh your phone skills – the most important piece of equipment in the office.