

Phone Etiquette 101

“We believe in providing legendary service.” This is the first line of our list of values and everything included in this manual should assist you in achieving this attainable goal.

This legendary experience Dr’s Penrod and Spivey preach about wanting each of their patients’ to enjoy, is only achieved with many small, individual efforts by all team members.

From the first phone call to the discharge of the patient every time, the experience should be relaxing and memorable.

Most Important Rule to Remember: If a patient needs help, when can we help him or her? NOW! That means “come on in” NOW.

Phones: Before answering the phone, try smiling first. Patient’s can tell even on the phone if we are having a bad day. Now you are ready to start your phone interview.

There are 3 important questions.

1. **What is the main purpose of the phone call? Why did they call a dental office?**
 - a. They called for a reason. What specifically is it?
 - b. How can we help right now? Today... Not next week.
 - c. Let’s make a difference and not procrastinate.
 - d. Resolve the call now. No delays.
2. **Can we help this person during this phone call?**
 - a. Are they in pain?
 - b. Do they need an appointment?
 - c. Have an account problem?
 - d. Insurance question?
 - e. How are we going to help the patient?
 - f. Have they determined how they will be able to pay for treatment?
 - g. Do they need financing options offered?
3. **How did you hear about us?**
 - a. Is this a referred patient. We credit \$25.00 towards future cleanings for referrals
 - b. Helps with advertising dollars

Don’t look like this!!!!



Prior to getting off of the phone you must make an impression that we are different. If you don't make that impression of something special....*Then go home!* **The quality of the dentistry that our doctors provide, the passion that they put forth every single day is amazing, and you *MUST* represent that in your voice when interacting with patients.**

Use these three magic words every day, every hour, every minute that you work:

1. *Certainly* 2. *My Pleasure* 3. *Absolutely*

First Impression

You **MUST** always smile first, *then* pick up the phone.

As a new patient calling our office the first words I will hear will be your Telephone Greeting. What will it say to me? What kind of an impression will it make on me? Remember this will be your **FIRST** moment of truth! On the lines below, create an impressive telephone greeting message for your office. Remember this message can be changed from month to month, or quarter, in order to continue to wow patients in a new way.

Insist to the patient that their the spouse comes to the appointment to meet the doctor and discuss treatment options for them too.

More Phone Rules

We are implementing some basic rules to help increase the quality of patient care.

- If you pick up a phone, you are to mark it on the Write n' Stick Message Book near the phone even if you have taken care of the patient and there's no need to take a message. The message book should be dated with a start date, future end date, and assigned phone number.
- Each phone must have a message book. You aren't to be on the phone without writing a message. *Most importantly*, you must make a note in a patient's notes in the color red while talking with a patient. You should be documenting the entire conversation *during* the conversation. Most phones are next to a computer, so if you're not writing notes while talking to the patient, get off the phone. This way, we don't have to worry about a patient claiming to have called 10 times without a response. There would be documentation of it.
- We want you to defend your coworkers and our facility if accused of not handling a situation properly. Simply state *"Sir/Ma'am, I can understand your frustration and want to help take care of you, I document every conversation I have with patients and know my team members do as well. Unfortunately, I don't see where there is any documentation of*

these previous calls so in order to best take care of you, please bare with me because I will be typing what your concerns are into your account. I will then provide an email copy of this to my supervisor and I can assure you that Dr. ____ wants you to be happy and completely satisfied. I don't have the answers for you right now, but can assure you I will see to it that you are taken care of."

- One more location where you must write down the number of calls is a call log when you are the only employee at an office. You are not responsible to get the phone to ring, but you are responsible for being effective on the phone if it does. We have the ability to track our number of incoming calls and we need to effectively manage them.

Answering Machine Messages

Lunch Message

***Please note that this message should rarely be used as phones are to be forwarded to another office as indicated by your supervisor when you are the only person at an office and have to leave for lunch.**

"Thank you for calling _____. If you have reached this recording, we are either on the other line, or with a patient. Please leave a detailed message and we will promptly return your call. If this is a dental emergency, please call 857-0825 and someone will assist you."

Night Message:

***Please note that this message is to be used routinely on Monday through Thursday, and on Friday only if there is no office open the following day.**

"Thank you for calling _____. Today is _____, and our office is closed for the evening/weekend. If you need personal assistance, please call us during our regular business hours Monday through Friday, 8a.m. until 6:00p.m... If you are an existing patient and you are having a true dental emergency, please call 857-0825. Thanks for calling and have a great evening/weekend!"

Friday Night Message:

***Please note that this message is to be used each Friday at Spivey Center for Modern Dentistry and Canopy Oak Modern Dentistry, only if each office is open the next day.**

"Thank you for calling _____. Today is _____, and our office is closed for the evening. If you need personal assistance, please call us during our regular business hours Monday through Friday, 8a.m. until 6:00p.m. We are also open tomorrow, Saturday, from 8a.m. until 12:00p.m... If you are an existing patient and you are having a true dental emergency, please call 857-0825. Thanks for calling and have a great evening!"

*** Cala Hills Dental is to forward their Line 1 to Canopy Oak Line 1 every single evening and Canopy Oak Line 3 everyday at lunch if you are at the office alone, and there is no need to leave a message at either time.**

Saturday Message:

TO BE WRITTEN ss