

## The Greeting



## PHONE POWER



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# The Greeting

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## Watch the corresponding Video Series.

Find videos in the left hand navigation of your Practice ZEBRA dashboard.

*Perfect for energy-boosting huddles with your entire team!*

### INTRODUCTION

Part 1 (4 mins)

Part 2 (4 mins)

### GREETING

Part 1 (4 mins)

Part 2 (4 mins)

Part 3 (4 mins)



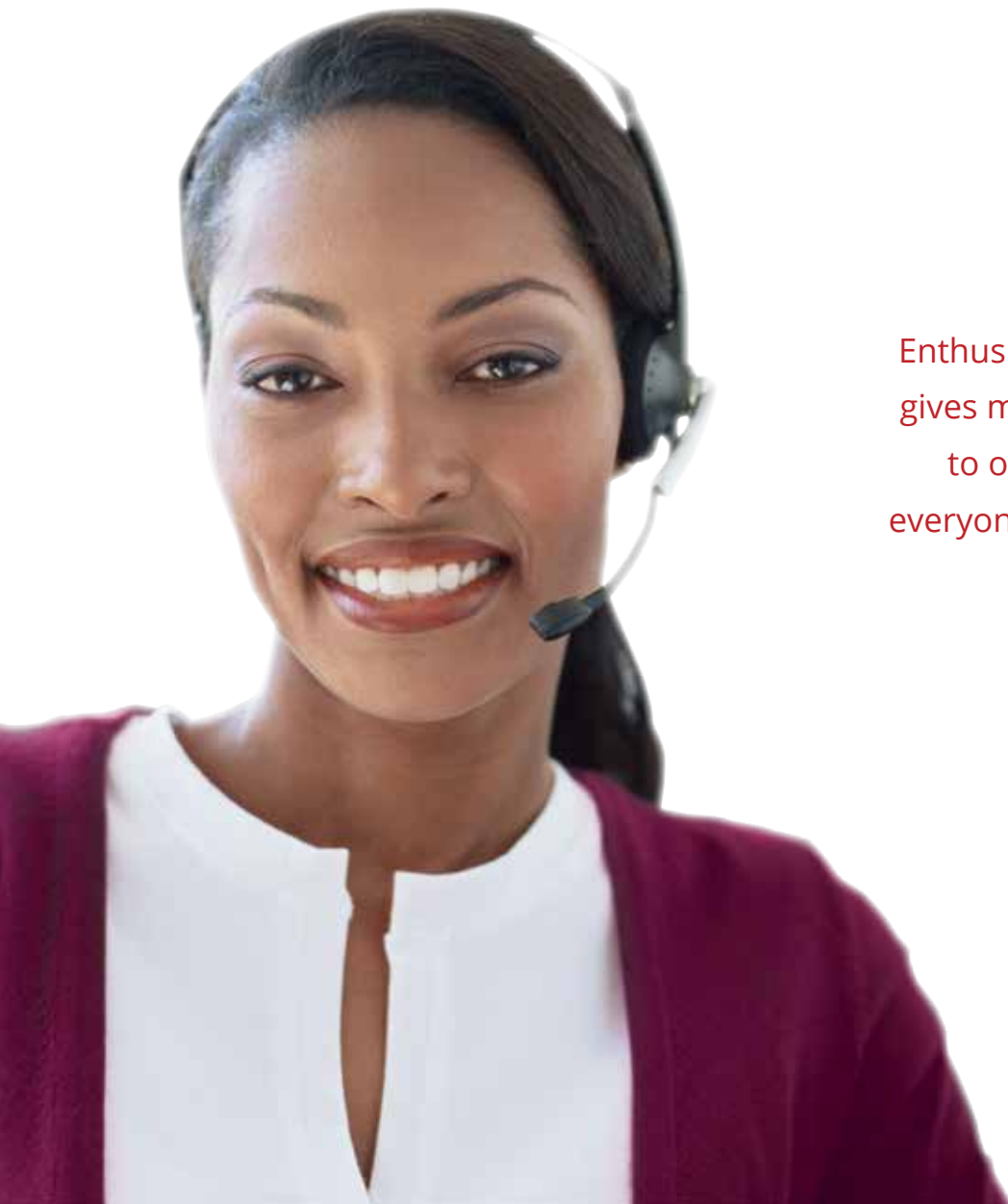
# GREETING WITH ENTHUSIASM

To a new patient caller, your front-line team is your practice.

Those team members answering the telephone need to be “ON” for all calls. Their job as the practice’s **representative** is to *WOW* that new patient and *wipe out* their need or desire to interview other competitive practices.

It is imperative that your practice selects the most enthusiastic and outgoing employees to represent you on the telephone. On top of that, these individuals need to have excellent product knowledge and call-handling skills.

To accomplish this, when answering the phone, these people need to project the proper **attitude, voice tone, knowledge, and techniques** to represent your practice – in fact they *ARE* your practice to new patients.



Enthusiasm communicates and gives motivation to oneself and to others. It’s important that everyone work at it. Enthusiasm isn’t always easy.

# ELEMENTS OF THE GREETING

## HOW MUCH COULD POSSIBLY BE INVOLVED?

Surprisingly there really are a number of overall components to greeting patients and setting the tone for the call. All call handlers need to:

- Use the scripted opening
- Use a professional tone and establish a friendly rapport
- Convey enthusiasm
- Speak slowly and clearly
- Avoid putting the new caller on hold (or effectively handling a necessary hold)

New patients expect a business line to be answered on the first ring and no later than the second ring.

## PRIMARY SCHEDULING TECHNIQUES

### We will train you on:

1. The basic 4-part greeting
2. The importance and value of listening
3. The ability to answer necessary questions *concisely*
4. The skills to *control* the scheduling of a patient into the desired appointment times



# THE 4-PART GREETING

Let's begin with the Introduction – **the 4-part greeting**.

You open first with: Good morning, afternoon, or evening. Then the practice name. Next your name. And finally, ask the question how you may be of help.

- **HOW MAY I HELP YOU?** – This is a critically important component of your greeting because it sets a positive tone for the entire conversation.

It enables the caller to feel comfortable engaging with you in conversation and asking their questions. By beginning with that phrase, you're showing a positive attitude toward helping them right from the start. They know you're there to assist them and are interested in satisfying their needs and wants.

- **ALWAYS TRY TO ANSWER ON THE FIRST RING** – New patients expect a business line to be answered on the first ring and no later than the second ring. After that, they may hang up. Once they hang up, you probably have lost a new patient or angered a current patient.
- **SOUND ENTHUSIASTIC AND READY TO HELP** – Project enthusiasm and an eagerness to help. Listen closely to the patient's opening statement and respond accordingly. Never make a patient repeat information because you failed to listen or because you were not prepared to make note of his/her request. And be sure you really do *say it with a smile*.
- **START BUILDING RELATIONSHIPS** – Along with speaking in a friendly voice that conveys your willingness to help, establish a rapport by finding common ground. Address the patient by name once you learn it.
- **ADDRESSING THE CUSTOMER BY NAME** – You may use the patient's first name if they introduce themselves to you that way. Exercise good judgment on this and, when in doubt, address the patient using Mr., Mrs., or Ms. and their last name. Let the patient be the one to let you know if it is all right to use their first name.
- Remember, the smile on your face does come across in your voice. It really does! Smile when speaking on the phone to callers.



In focus-group research with patients, one of their primary complaints is:

*"I COULDN'T UNDERSTAND THE COMPANY NAME, THEIR NAME, OR WHAT THEY WERE SAYING."*

Speak slowly and clearly!



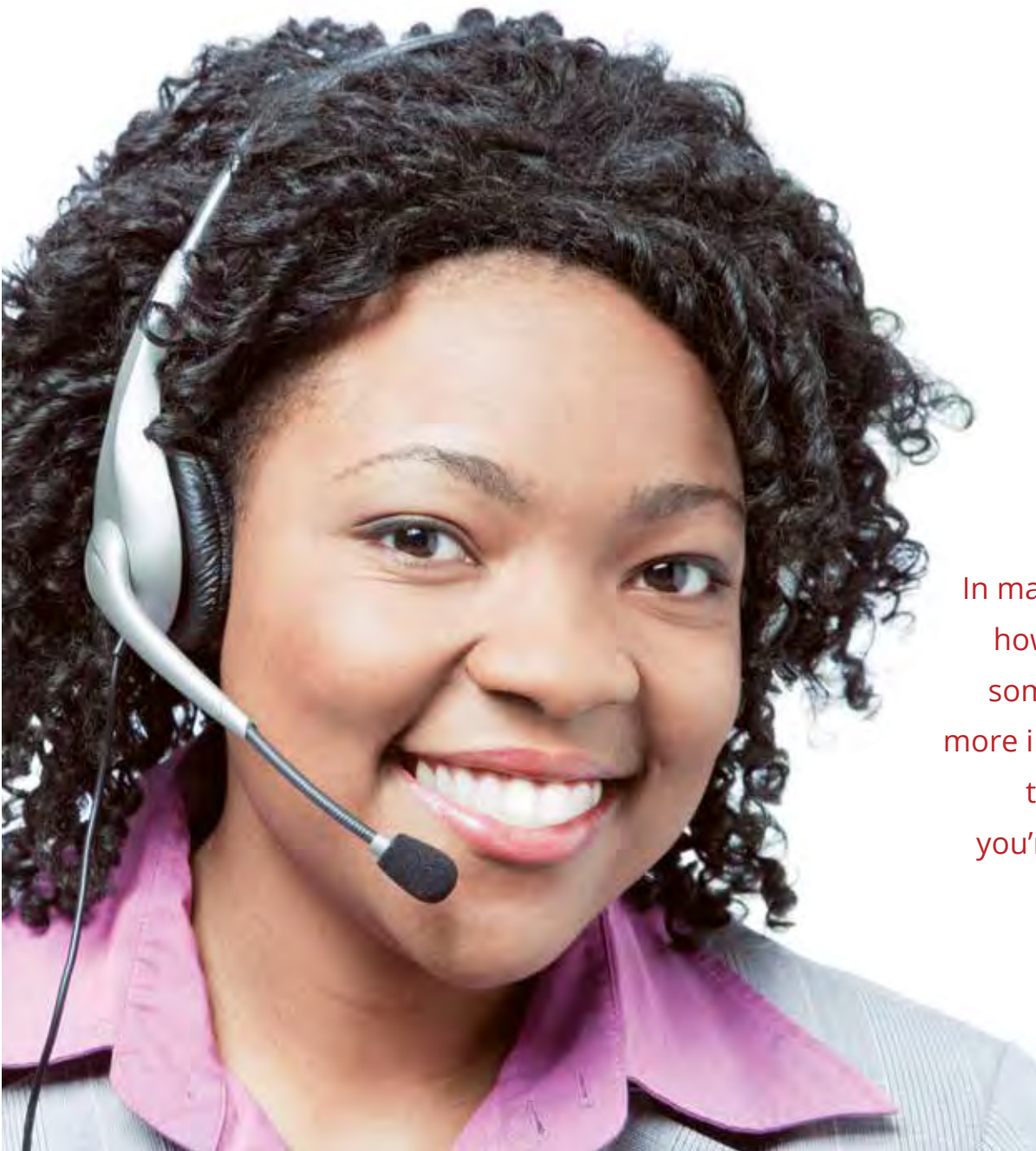
**HERE ARE A FEW IMPORTANT SKILL POINTS THAT WILL HELP YOUR PERFORMANCE:**

- When a patient calls and starts immediately with, "I'd like to know your office hours." Welcome them. Tell them how happy you are to be able to service them.
- Sound enthusiastic – project your eagerness to help. When asking your opening question, sound like you really want to assist the caller. Answer in a professional yet friendly tone.
- Speak slowly and say your name clearly so that all patients can easily understand you.
- Have a positive attitude and a positive tone of voice. Your mood can be heard ... stay positive.

Keep in mind that you want to maintain your upbeat tone throughout the entire call so that the patient continues to feel that vote of confidence – that they've made the right decision in calling your practice.

# SAY IT WITH A SMILE

Communicating with patients by telephone requires a different skill set than interacting with patients face-to-face. Listening becomes even more important when you cannot see your patients because it is impossible to pick up on the nonverbal cues. When patients cannot see you, what you say, how you say it, and what you do not say are equally important as *really listening* to them.



In many cases,  
how you say  
something is  
more important  
than what  
you're saying.



# PROFESSIONAL TONE & DEVELOPING FRIENDLY RAPPORT

You might ask, what's the difference between having a professional tone and establishing a friendly rapport? If you're polite and enthusiastic (professional), but don't listen to your caller, you will be unable to establish rapport. You want to *actively listen* to each caller.

## IN ADDITION, FOR SUCCESS:

- Use a tone of voice that is serious, caring, and expresses your willingness to understand – especially with a patient who is apprehensive.
- Similarly, your tone should move to enthusiastic when asking how you can help. Your tone of voice should always fit the message you are sending.
- In many cases, how you say something is more important than what you're saying.

## YOUR VOICE HAS 5 DISTINCT ELEMENTS:

Pitch • Tone • Inflection • Rate • and VOLUME!

- Too soft and callers can lose confidence and have difficulty understanding you.
- Too loud and you could come across as aggressive and turn off a potential patient.

Listen to your  
call recordings  
and practice the  
ideal volume for  
your practice.



# SPEED & CLARITY

The speed of your message and the rapport you establish with the new patient is very important when creating a first impression.

- NOT too fast. It sounds like you're flustered or rushed.
- Speaking too slowly – emphasizing every word – can come across as conveying anger.
- People respond positively when speaking rates are similar to their own.
- Practice. It is important to find the right pace to convey your enthusiasm. Unclenching your jaw can help with clarity.
- When presenting your information, speak in simple to-the-point non-clinical language.

Above all, be consistent. The key is to accomplish the skills mentioned ON EVERY CALL, ALL DAY LONG. It takes dedication to achieve this. To that new patient, you are the practice. And that is the same whether it is call #1 or call #25.

Support your  
speech with  
lots of breath  
to help develop  
a strong voice.

A strong voice  
(as opposed  
to loud) is seen  
as positive!



# AVOID PUTTING NEW CALLERS ON HOLD

Almost 50% of patients interviewed said they did not schedule with a particular practice because of poor customer service ...especially being kept on hold.

**When possible, AVOID putting a caller on hold.** But in some circumstances it just can't be helped. Remember two things:

1. Most callers are tuned to WIIFM – What's-In-It-For-Me
2. People greatly value their time!

When it is necessary to place a patient on hold, explain why you're doing it. This is a courtesy patients will appreciate. If you find it necessary to place the caller on hold immediately – start relationship-building: Go through the 4-part intro. Capture their name and number. Ask if you have their permission to place them on a short hold. You now have a solution for those who hang up while on hold.

- Almost 50% of patients interviewed say they did not schedule with a particular practice because of poor customer service ... ***especially being kept on hold.***
- Some said that they did not even have an opportunity to speak, but experienced the automatic "Hold Please" scenario.
- Others mentioned they specifically disliked when they were kept on hold ***too long.***
- Still others recounted that sometimes they were placed on hold 2 to 3 times during one call.

It's interesting, when you're listening in on a call – you can hear negative comments from callers about being placed on hold too often or too long. As a rule of thumb: 90 seconds on hold is the maximum allowable.

If the front desk is very busy with patients checking in and out, the doctor is asking to speak with you, or you have no backup available...

You may have to call the patient back – **so make it a positive experience:**

*“Because I would like to give you my undivided attention, may I take down your number and return your call promptly?”*

Be sure to call back in a timely manner when you promise you will. When you do call back say:

*“Thank you so much for allowing me to call you back. Now I can give you my undivided attention.”*

Avoid using excuses or statements like, “It’s crazy around here today!”

In general, many patients feel office call backs and responses to voicemails and emails are too slow. Over 30% of those who don’t get a call back, won’t call a second time.

If you find long wait times are necessary, return to the call and always offer to call back.





# VOICEMAIL

- **It's imperative** that you avoid using voicemail during business hours (between 8am-6pm). If you must, **DO** ensure you have INSTANT Alerts setup in Practice ZEBRA. Not only will your team be notified when a call isn't answered live, but the caller will also receive a courtesy text their call and improving the chance they'll wait for your call back instead of moving to a competitor.
- Ensure that your recording represents you well. The message is also creating a first impression.
- The message should be welcoming and enthusiastic.
- If you're using an out-of-house answering service, how are they with their greeting and skills? We need to ensure they understand the importance of a smile and positive experience.

It's documented that only 15% of new patients leave messages. Most just go on to the next office on their list. Much of this can be attributed to the ineffectiveness of the voicemail message.

Create a good impression. Always state the practice name, the name of the person speaking, and offer a fast way for the person to find the solution they want. Then, add in the mandatory emergency room and doctor numbers.

## OBJECTIVES OF ANSWERING MACHINE MESSAGES:

1. WOW the caller with telephone enthusiasm, tone, and clarity (speak clearly and slowly).
2. Inform the caller that you are not available, but definitely want to speak with them ... and will call back ASAP.
3. If desired, select a feature/benefit line about the practice (it should apply to both new and current patients).
4. Provide the necessary help information (hours & location), but list it after achieving the first 3.
5. When out of the office explain the "emergency" info just before the end.
6. Close the message pleasantly and enthusiastically.

# GREETING RE-CAP

Overall, when greeting a new patient, it's important to sound like you really want to help the caller. Answer in a professional, yet friendly tone, and maintain a level of engagement and enthusiasm throughout the call. Remember to "say it with a smile." Play back and listen to recorded calls – if you don't sound exactly as you thought, work on your tone and engagement, then practice, then play back and listen again. This is the big benefit of our Telephone Performance Phone Power – you'll be able to monitor your own progress to continue to enhance your results.

**A ringing phone  
is a new opportunity!**





### TOP TELEPHONE TIPS FOR THE GREETING

- Always use the 4-part greeting
- Open the call with a smile
- Always be friendly and enthusiastic
- Remember that your mood can be heard – stay positive
- Use ice breakers if there's dead air when you're waiting for your system to catch up:
  - ✓ "How are you enjoying the weather today..."
  - ✓ "How has your day been so far..."
- Listen closely
- Stay focused
- To politely redirect a talkative caller:
  - ✓ "I don't want to take up too much of your time..."
  - ✓ "I'm sure you're busy so I'll..."
  - ✓ "One final thing to mention..."
- Keep pen and paper at the ready for short quick notes
- Allow the speaker to finish what they are saying
- Use words the patient is using or say, "I agree" or "I can see where you're coming from..."
- Show empathy
- Show understanding by restating what the caller has said or asked
- Ask questions
- Practice your scripts so that they sound natural
- Always be friendly
- Beware of barriers. Don't block the new-patient appointment
- Avoid putting your caller on hold, but if you have to, explain why and for how long
- If you have an unhappy caller, keep your cool and your smile
- Be yourself and have fun!



# PRIORITIZING YOUR DAILY CALLS



A dental office receives a wide variety of telephone calls each day. We have listed a few types of calls on the next page.

- Each type of call has been prioritized.
- Below the list, add any additional types of calls you receive.
- Ensure everyone agrees on your call-handling priorities.

Of course, for your scheduling training, your #1 priority is new patients, but all calls, no matter their priority, should be handled professionally.





- **NEW PATIENTS** – Your #1 Priority. When you have a new patient on the phone, there is no more-important use of your time. Try not to put them on hold! You must not let yourself be distracted.
- **CURRENT PATIENTS** – Keep your customers happy. Unless your entire staff is tied up with new patients, your existing patients should always be given prompt service. Don't forget that one of your best sources of new patients should always be referrals from your existing ones.
- **PAYMENT COMPANIES** – This could be an insurance company or a patient looking to make a payment. If you want to keep the paychecks coming, these calls should get the priority they deserve.
- **OTHER DOCTORS OR DENTAL ASSOCIATES** – Your doctor is busy and so are their colleagues. You shouldn't make them wait any longer than they have to, but they shouldn't move above any of the first three on the list. They are in practice too, so they will understand.
- **BUSINESS/SALES CALLS** – These are necessary to keep the office running. Transfer calls to the appropriate party quickly and stick to business. Keep lines open for new patients.
- **FAMILY & FRIENDS** – Unless there is a serious emergency, calls from the team's family and friends are a nuisance and should be treated as such. Personal calls should be eliminated by redirecting to an alternate phone line.
- **ADDITIONAL TYPES OF CALLS**

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2

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3

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4

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5

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6

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For the dental practice or DSO that  
wants to **STAND OUT** & *Grow!*



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