



CNA HealthPro

Good Telephone Technique Keeps Patients Connected

The success of your practice depends on strong relationships and patient confidence. This process often begins with good telephone skills.

The following ideas, culled from a variety of sources, can help you and your staff deal more effectively with patients and create a more positive image of your practice.

The recommendations fall into three categories:

- making an impression when the phone rings
- taking messages
- managing return calls

Making an Impression

- Before answering a call, smile. Even though callers can't see your expression, they will quickly pick up your mood over the phone. By consciously relaxing and smiling, you can help maintain a warm and friendly tone.
- Pick up calls promptly. Try to answer on the first or second ring; always answer within 4 rings. If the volume of calls makes this difficult, it may be time to hire an additional receptionist.
- Identify yourself and the office when you answer. A response such as "Dr. Johnson's office, Sarah speaking, how may I help you?" orients the caller and begins the conversation on a courteous note. Do not rush your greeting – pronounce your name clearly so the caller can understand and repeat it.
- Use the caller's name. Using patients' names will help make them feel comfortable and show that you think of them as individuals. If in doubt about pronunciation, ask callers to repeat their name.
- Be empathetic and treat all calls as important. Put yourself in the caller's place and try to understand his or her needs. If the caller is in pain, finding relief is of utmost importance, and your phone manner and attentiveness should reflect this concern.
- Be a good, courteous listener. Give callers your attention; do not make them feel they are imposing on your time. Ask appropriate questions and use noncommittal phrases ("I see," "all right") to draw the caller out and show you are paying attention. Courtesy phrases such as "please" and "thank you" also demonstrate respect for the caller.
- Be prepared. If you know someone is due to call on a certain day, have the treatment plan, insurance documents or other relevant information ready and available before the person calls.
- Maintain proper decorum and do not lose your temper with angry callers. Don't interrupt disgruntled callers before they're ready to listen and respond to you. Let them finish venting, then acknowledge

their anger and suggest a solution to the problem. Apologize for any inconveniences the caller has experienced at the practice, even if you are not personally responsible for the problems. To the caller, you represent the practice.

- Ask permission before placing callers on hold. For example: "Would you mind holding while I see if Dr. Tobin is available?" This lets callers know you value their time. If they stay on the line, acknowledge them every 30 seconds: "Thank you for your patience; I'm sorry to keep you waiting."
- Know how to end the call. Thank the caller and end the conversation on a polite note – for example, "If we can help further, do not hesitate to call again." Let the caller hang up first.

Taking Messages

- Verify the caller's phone number and the spelling of his or her name.
- Write down the date, time and reason for the call.
- Note the caller's tone of voice.
- If a return call is needed, record this on the message and establish a time frame to follow up.
- Establish a priority code for return calls (e.g., 1 for emergency calls, 2 for important non-emergency calls, 3 for lower-priority calls).

Managing Return Calls

- Designate a "telephone hour." Set a time every day to return non-emergency phone calls. Coordinate the time with your staff to avoid unnecessary interruptions. Have your staff schedule your return calls during the telephone hour.
- Return calls in order of priority. If you are unable to return all calls, at least you will have had the chance to complete the most important ones. Return them in order, even if it means making unpleasant calls first.
- Treat return calls as you do appointments. Callers perceive call-back arrangements as promises. If you are unable to return the call at the scheduled time, have a staff person call the patient to arrange a new time.
- Read phone messages carefully before returning calls. Know what to expect.

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