

# 8 STEPS TO CONVERTING A PHONE LEAD INTO A CONSULTATION

A guide to best practices amongst medical office phone reception staff

## 1 SALES-MINDED RECEPTIONIST

An ideal receptionist should have it as their primary (and hopefully only) responsibility. They should be bright, knowledgeable, friendly and have somewhat of a 'sales' mentality, understanding that their primary goal is to convert an interested patient to a scheduled consultation.

## 2 COVERAGE, COVERAGE, COVERAGE

Patients calling during business hours expect to speak with a live person. MD Connect research has shown that when a patient reaches an answering machine (or other complicated computerized system), 71% of the time these patients hang up AND 82% of the time these same callers never call back.

## 3 KNOW THE OBJECTIONS

In our experience, 90% of phone questions/objections center around the same small group of issues. Having your answers to these questions thought out ahead of time will make for seamless responses and a more positive experience for the questioner.

## 4 ASK FOR THE APPOINTMENT

Too often receptionists wait too long to ask the patient if they would like to schedule an appointment, or never ask at all. Cut to the chase by positioning that question early (and often if needed). Even better, make it easy by suggesting the next available open slot(s).

## 5 DON'T MAKE THEM WAIT

Everyone is busy these days, and physicians have a reputation for making patients wait. Show them you are different by answering the phone quickly (within two rings) AND avoiding extended hold times (anything longer than one minute is TOO long...patients will hang up).

## 6 POSITION YOUR PRACTICE

To do this, it is important to know your competition well, identify the 2-3 key points that differentiate your practice from them (and prove you are better!), and educate your receptionist so that they clearly understand these 'positioning points'.

## 7 DON'T PLAY 'PHONE DOCTOR'

Callers will often ask a host of medical questions. Receptionists with clinical and/or extended office experience, often know the answers to many of these questions, and try to help out by responding. The best course is to defer answers on deeper medical questions to the doctor.

## 8 KNOW YOUR GOAL

The receptionist's goal should be clear and simple: Get the caller to make an appointment. All other activities should be in service of this goal.

