

## Optimizing Your Call Process

**Purpose:** To provide a visual reference for discussion with your BDM and to assist you in visualizing the optimum call process for your practice.

**Reference:** Refer to your completed Phone Communications Assessment and *Sales Cycle Module 1: Mastering phone communications* for a discussion of call process.

Practice name: \_\_\_\_\_ Date: \_\_\_\_\_

### Current

Draw a diagram of your call-handling process from call start to finish for a typical call. List each transfer and hold period as a separate step, and indicate the typical hold time. Also indicate what happens if a caller leaves a message and what the typical response time is for your practice.

### Optimized

Envision the best process flow for optimizing the experience of someone calling your practice. Using separate boxes for each step, draw the call process from start to finish. For hold periods, or time between a voice message and return call, indicate your target hold or response time.

### WHAT NOW?

Share your completed worksheet with your BDM as you work together to develop an Action Plan. Keep your completed worksheet for future reference—it will serve as an instructive benchmark of your practice at this point in time.