



Phone Communications Assessment

Purpose: To compile information about your phone-handling capabilities, policies, and strategies.
 Preparation: Gather the information necessary to answer questions about your phone system, call volumes, staff training, call-handling procedures, and lead tracking and follow-up.

Practice name: _____ Date: _____

Part One—Describing our practice

Telecommunications system

- A. We have _____ phone lines in our practice.
- B. We have a dedicated LVC phone number that is used in our marketing programs.
 Yes No
- C. Our phone system is equipped with the following features:
 Voice mail Message-on-hold None
- D. Our message-on-hold is updated:
 Weekly Monthly Rarely

Call volumes and conversion rate

- A. Our practice handles _____ incoming LVC calls per day.
- B. Each LVC representative handles an average of _____ incoming LVC calls per day.
- C. Our practice handles _____ outgoing (follow-up) LVC calls per day.
- D. _____ % of our phone inquiries convert to consultation scheduling and appointment.
- E. Our conversion rate varies substantially depending on who handles the call.
 Yes No

Call-handling procedures

- A. Our LVC calls are handled by:
 - The person nearest the phone
 - A member of our LVC staff
 - LVC Coordinator with specialized training
 - Other (please specify)

- B. We endeavor to answer incoming calls by the third ring:
 Always Usually Rarely Never
- C. Callers are placed on hold:
 Always Usually Rarely Never
 The average hold time is _____ minutes and the longest that callers ever wait on hold is _____ minutes.
- D. We answer our incoming phone calls with a standardized phrase/greeting.
 Yes No (If yes, write the phrase below)

- E. We handle after-hours and lunchtime calls as follows:

- F. We have a policy of returning phone calls within _____ minutes/hours/days. (circle the appropriate time unit)

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Part Two — Staff training

A. Training for the LVC staff answering calls includes the following: (check all that apply)

- Basic LVC knowledge
 - Phone etiquette
 - Listening skills
 - Probing techniques
 - Features/benefits of the procedure/practice
 - Handling objections
 - Patient database entry/tracking
 - Other (please specify)
- _____

B. Our telephone training is conducted by:

C. We update our phone training _____ times per quarter.

G. We have the following support materials available for our LVC team to use in assisting callers: (check all that apply)

- LVC procedure information
 - Practice profile
 - Information on our doctors
 - Sales script/key talking points
 - Prospect/patient database
 - Handling objections
 - Other (please specify)
- _____
- _____
- _____

Part Three—Lead tracking and follow-up

A. We track prospects from lead through post-op using the following system:

- Database (please specify program)
- _____

- Paper forms
 - Other (please specify)
- _____

B. We track the following information regarding phone prospects: (check all that apply)

- Degree of interest
- Motivation for having LVC
- Referral source
- Visual status (glasses, contact lens, etc.)
- Progress (where they are in the LVC process: seminar, screening, consultation, post-op patient, etc.)

C. Our lead-tracking system is managed/input by (name and job title)

D. We proactively follow up with _____% of the prospective patients who call.

E. We typically follow up on leads within _____ days.

F. When following up on leads, we contact prospective patients by: (check all that apply)

- E-mail
 - Fax
 - Phone call
 - Other (please specify)
- _____

G. We provide Patient Information Packets:

- To all callers
- To some callers
- Upon request

When considering the phone communications of our practice, I would rate the effectiveness of our phone skills as _____ on a scale from 1 to 10 (10 = highly effective).

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.