

Katherine Eitel Belt's

# HAVE THEM AT HELLO

Exceptional Unscripted Telephone Skills for the Extraordinary Practice



NEW  
REVISED  
EDITION

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Why?

Why are exceptional telephone skills important to your practice?

- a. It's the first step on the patient's journey to saying "yes".
- b. It is your very best marketing tool.
- c. It reduces confusion and stress.
- d. It makes a positive connection in the mind of the patient.

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Why is it an important skill for you, personally?

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## A Few Things to Keep in Mind

There is no one right way -- just one right way for you.

Most calls will be predictable.

Two separate pieces to successful communications:

- i. Technique – the *words* you use (appeals to logic)
- ii. Attitude – your *expressions* (appeals to emotions)

The value of learning -- and relearning -- the basic skills.

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## Basic Telephone Etiquette

Initial greeting

*"Thank you for calling The Art of Dentistry. This is Katherine. (How may I help you?)"*

Smile... it's your paycheck!

Headsets

Slow down (be careful)

Who comes first?



**Action item:**

Compose your new greeting. Be sure to agree on it as a team. Then practice it a few times so that it becomes natural.

## On Hold

On-hold message or music

1. Check it often
2. Music / message combo
3. Male / female alternating voice
4. Educate rather than advertise

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### Action item:

Evaluate your current on-hold system.

Voice Mail Messages

After hours:

*Thank you for your decision to call the dental office of Dr. Sarah Byron in San Jose, where we specialize in creating beautiful, radiant smiles for our patients. We are unable to take your call at the moment, but look forward to giving you the smile of your dreams. Please leave a confidential message of any length including your name, phone number, and, if you'd like, what it is about your smile that you'd like to improve. We'll return your call and take the time to understand your unique concerns. If this is an emergency, we are concerned about you and ask that you please dial 222-2222 so one of our team members may respond to you quickly. Again, thank you for calling and we look forward to helping you!*

# Have Them at Hello!

## Phone Skills for the Exceptional Practice



During office hours:

*Hello. Thank you for calling Dr. John Howard. We're creating beautiful smiles for our patients and we apologize for not being able to take your call personally. Please leave your name and phone number and we will devote our attention to you just as soon as possible. Thank you again for calling and make it a wonderful day.*

Team meeting:

*We are currently attending an educational meeting to improve our practice and the care we give our patients. We will return to the office at 10:00 am and we would love to return your call.*



### **Action item:**

Compose your own exceptional voice mail message, including one for after hours, during office hours and for team meetings.

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## What's Exceptional About Your Practice?

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**Action item:**

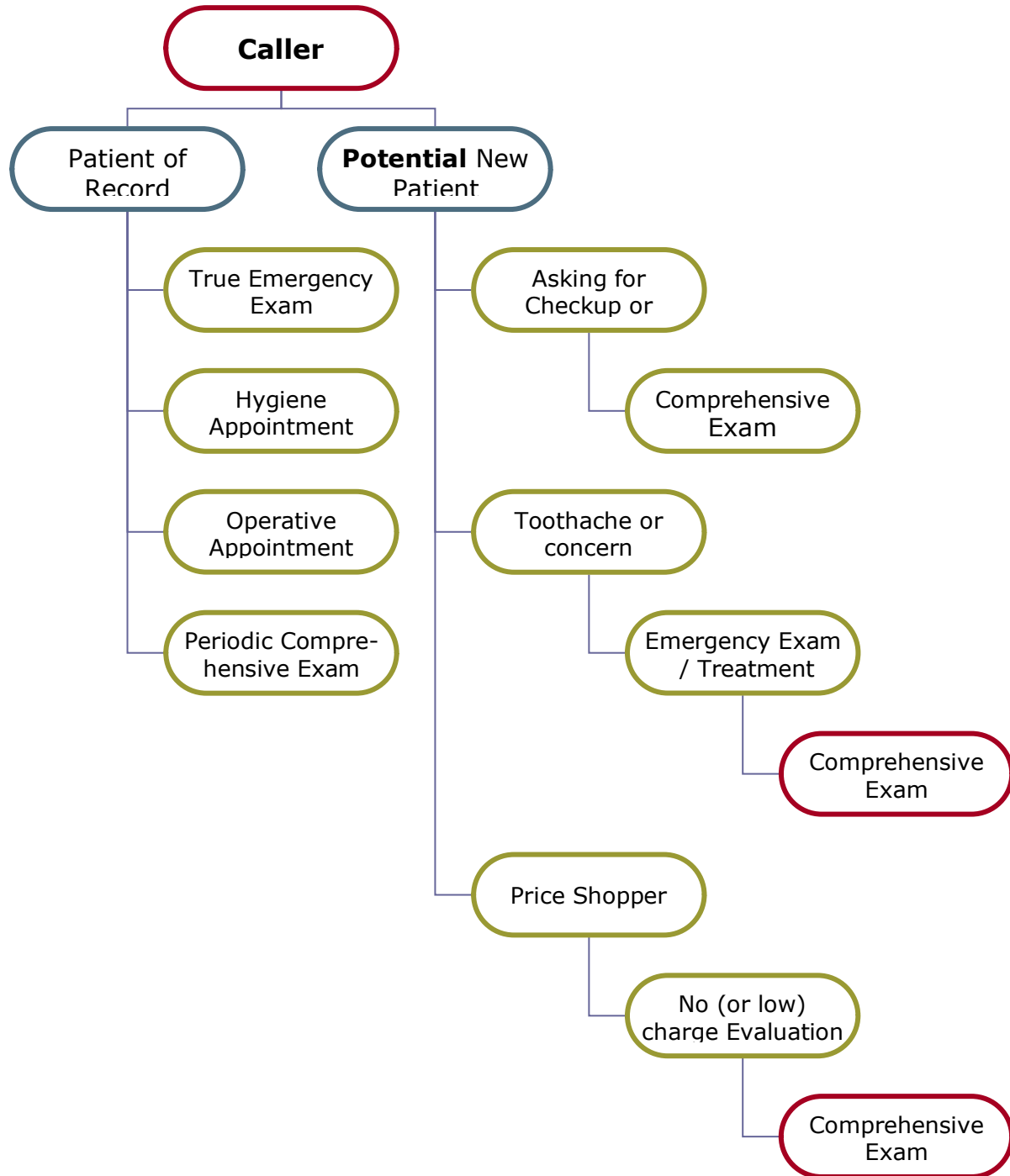
If you were speaking directly to a patient, how would you answer the following questions? (Please list key word qualities only, ie, high quality work, friendly team, thorough exams, etc.)

1. What is exceptional about our practice?
2. What is exceptional about our dentistry?
3. What is exceptional about our dentist(s)?
4. What is exceptional about our exams?
5. What is exceptional about our hygienist(s)?
6. What is exceptional about our equipment and/or facility?
7. What exceptional services do we offer to a patient who has financial concerns?
8. What exceptional services do we offer to a patient who has anxiety about dental treatment?



## To Whom Are You Speaking?

Know where you are going.



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## Four Steps/VIP Intake Form

a. VIP Intake Form



**Action item:**

Print VIP Intake Form on colored paper and customize for your team.

b. **The 4 Steps**

1. WELCOME
  - Get and use the patient's name
  - Make a personal connection
  - Welcome officially
  - Build rapport
  
2. DISCOVERY (QUESTIONING)
  - This is where you gain control of the call!
  - These are not contact information questions (such as name, address, phone number, or birthdate.)
  - Use questions to find the answers to two things:
    - What appointment is best for them? (It's not always the one they asked for!)
    - What are their emotional motivators (such as money, fear, health, time, etc.)?

### 3. SOLUTIONS

- Offer an appropriate solution and sell them on it
- Offer solutions to the two questions above:
  - the best appointment to meet their needs
  - why you are a great fit for their biggest concerns and primary motivators

### 4. DETAILS

- Get details such as insurance, date of birth, contact information.
- Give details such as directions, website / welcome packet info, and reconfirm appointment time.
  - Build rapport as early as possible.
  - Compliment at every opportunity.
  - Questioning and listening skills
    - Question
    - Really listen
    - Don't assume anything!
    - Active listening skills



#### **Action item:**

Stop and discuss the 4 steps with a partner. Memorize the steps and test each other.

*(Refer to the VIP intake sheet in back of book.)*

Asking for a Cleaning (or needing an exam)

(Getting the patient to go where it is best for them to go.)

- a. Don't assume they know what to ask for.
- b. Use the basics ...
  1. Welcome them.
  2. Get their name.
  3. Build rapport. Make a personal connection.
  4. Then... get in the questioning seat as soon as possible.
  5. Repeat back their concerns / symptoms.
  6. Offer a solution that makes sense
  7. Offer an appointment.
  8. Always quote a fee (or range) for anything you schedule and promote payment options.
  9. Give excellent directions to the practice.
  10. Any additional questions.
  11. Reconfirm the appointment date and time.
  12. Compliment the patient's decision.

# Have Them at Hello!

## Phone Skills for the Exceptional Practice



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### **Action item:**

Familiarize yourself with the VIP Intake Form. Then utilize this form (and/or your own notes) to rehearse a call with a partner.

### **Tips:**

- Don't try to make the call a difficult one (or try to stump your partner) in the beginning. The idea is to learn the process first.
- Start over as many times as needed. Remember, you are learning a new skill and probably won't do it perfectly the first few times.

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## Emergencies

- a. Be empathetic
  
- b. Problem-focused questioning
  
- c. Offer two choices for appointment:
  - 1. Come in immediately and wait to be seen
  - 2. OR an appointment within a few days which is convenient for the practice.



## Shopper Calls

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### **Action item:**

Determine and write your practice guidelines for dealing with shoppers.

- Will you quote fees?
- Will you quote a range?
- Will you offer a low-charge or no-charge evaluation?
- How long will you schedule and when?
- How will the appointment be structured?
- Will you charge for an investigatory X-ray? (digital)
- Will you charge for a quick evaluation? If so, how much?

Then, practice this call with a partner.

Finally, place a cheat sheet by the phone with your notes.

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## Insurance-Driven Callers

Don't say "no" right away.

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≠ **Action item:**  
Practice with a partner.

Objections (patient concerns)

- Don't assume anything! Ask at least one clarifying question.

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≠ **Action item:**  
As a team, write down the most frequent objections or patient concerns you have experienced in the practice.

Utilize a partner to practice answering the initial concern or question with at least two additional questions before answering.



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## Moving an Appointment Forward

"Mrs. Jones, this is Katherine from Dr. Freeman's dental practice. We have an opportunity to see you earlier to take care of those fillings. Are you able to come in at 10:00 tomorrow?"

## Confirmation Calls

Try saying to patients at the time of scheduling:

*"Mrs. Jones, as a courtesy we offer reminder calls to our patients who would like them two days before their appointment, however some of our patients never need them. Is this something you would be interested in?"*

If they say no, then say, *"Great, Mrs. Jones, then I will mark it confirmed right now in doctor's schedule."*

If they have a poor appointment history with your office you might add:

*"I'm sure it won't be a problem for you, but do remember that we require 24 hours notice to change this appointment to avoid any additional charges to your account."*

For those you do need to confirm:

- Call work number first unless patient requests differently.
- Try this dialogue two days prior to the appointment:

*"Good morning, Mr. Scott. This is Katherine from Dr. Hansen's office. I was calling to let you know that our hygienist, Sara, and Dr. Hansen are looking forward to seeing you on Tuesday, March 2<sup>nd</sup> at 2:00 for your professional hygiene appointment and dental health examination. We have reserved one hour especially for you, Mr. Scott, and have no other patients scheduled at that time with Sara. I'm sure this won't be a problem for you, but I wanted to remind you that we do require 24-hours notice to change your appointment. I'd be happy to give you a reminder call again tomorrow, if you'd like."*

Specifically:

1. Mention the provider by name.
2. Don't say: *"I was calling to confirm your appointment."* Do say: *"Sara is looking forward to seeing you...."*
3. Use patient-friendly terms to circumvent confusion.
4. Remind the patient you have an hour reserved solely for them.
5. If leaving a voicemail message, end with a reconfirmation of the appointment time.

## Cancellation Calls/ Three Strikes

Know where the cancellation history will be kept.

Legitimate or “lame” cancellation excuse?

1. Cancellation system “Three Strikes and You’re Out!”
  - i. 1<sup>st</sup> Offense – waive the fee but mention it specifically
  - ii. 2<sup>nd</sup> Offense – charge the fee and reschedule
  - iii. 3<sup>rd</sup> Offense – reschedule only with non-refundable prepayment

2. Sound disappointed and forlorn.

*“Oh, Mrs. Jones, we’ve got an entire hour reserved for you. This really presents a problem for us. With such little notice, it is difficult to fill this time slot with another patient. Are you sure there is no possible way you can make it?”*

3. Warn the patient what will happen next.

4. Have a cancellation fee:  
No less than \$50, preferably higher (\$75 – 100).

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### **Action item:**

- Confirm and agree where your cancellation history will be kept.
- Identify “legitimate” and “lame” cancellation excuses.
- Determine your practice’s “3 Strikes” and consequences.
- Determine your cancellation fee.
- Practice all three strikes with a partner

### **Tip:**

- It’s fun to rotate this with a new partner for each strike!

Canceling appointment for first time with less than 24-hour notice:

*"Mrs. Patrick, I'm sorry to hear that you won't be able to keep your appointment with Beth. I know that she was looking forward to seeing you for your professional cleaning. I'm going to go ahead and waive the \$75 rescheduling fee for you because I understand that things come up unexpectedly and we really value you as a patient. I'll reschedule this appointment for you but let's try to find a time when you are sure you can make it because I won't have the authority to waive this fee a second time."*

Canceling with less than 24-hour notice or failed more than once:

*"Mrs. Patrick, I understand that you've had a hard time keeping these appointments. Just like us, you obviously have a very busy schedule. As you remember, I was able to waive our \$75 rescheduling fee last time but unfortunately I will have to charge it this time. I'm happy to reschedule you again but I want to make sure we find a time that you are sure will work for you because if you were to experience the same trouble again, Mrs. Patrick, we would need to have you prepay a non-refundable reservation fee in order to reschedule."*

Canceling with less than 24-hour notice or failed several times but absolutely wants to schedule again:

*"Mrs. Patrick, I understand that you've had a hard time keeping these appointments with our hygienist, Beth, due to your busy schedule. However, the 10:00 appointments that you have reserved are very popular times with our other patients and I have already waived our \$75 rescheduling fee once before. We do want to see you for your appointment and I could reschedule you in one of two ways: We can put your name on our quick-call list and give you a call when we have an unexpected change in our schedule or you can choose to prepay for your appointment to reserve your time with our hygienist. Which would work better for you?"*

## Reactivate Pending Treatment

*"Good afternoon, Mr. Talbot. This is Katherine from Dr. Coleman's office. Sara has just reviewed your chart, and your last appointment was on June 3<sup>rd</sup> last year. It's time for your six-month professional cleaning and preventive exam. Beth was concerned about an area of active infection on your lower right side and would like to see you as soon as possible for your appointment. She could see you for that appointment on March 5<sup>th</sup> at 11:00 or 1:00. Which would be more convenient for you?"*

### Pending treatment phone calls

*"Good morning, Mrs. Talbot. This is Katherine from Dr. Coleman's office. Dr. recently reviewed your chart and asked me to give you a call to see how that tooth on the lower right with the crack was doing. He was concerned because we haven't completed the treatment on that tooth. Are you experiencing any problems with it yet? Well, I know that Dr. Coleman would like to take care of that tooth before it is painful and possibly more expensive. He has an opportunity to see you on Thursday at 2:00 or Monday at 11:00. Which one of those would work best for you?"*

- a. If leaving a voicemail message, do not be specific about the reason for your call.

*"Mrs. Jones, this is Katherine from Dr. Smith's dental office. I have a question for you (or "I have something I'd like to discuss with you.") and wondered if you would please give me a call at your convenience at (909) 949-9999. Thank you."*

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Set yourself apart – exceeding expectations

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**Action item:**

What three things will you commit to improve this week?

Hear and understand me.

Even if you disagree,  
please don't make me wrong.

Acknowledge the greatness  
within me.

Remember to look  
for my loving intentions.

Tell me the truth  
with compassion.

~ Jack Rosenblum, Author ~  
*Managing From The Heart*

**Tips:**

Don't try to do this all at once! Make a list of the things you'd like to improve overall and then prioritize the list. Separate the list into three per week and date it. Put a tickled note on your calendar to review each Friday or Monday for the next week.

# VIP INTAKE FORM

Date of Call: \_\_\_\_/\_\_\_\_/\_\_\_\_

Team Member: \_\_\_\_\_

Dr. \_\_\_\_\_

**Greeting:** "Thank you for calling (practice name)! My name is (your name). How may I brighten your smile today?"

**Patient Name:** \_\_\_\_\_ Pronounced: \_\_\_\_\_  
 M  F  Adult  Teen  Child Age \_\_\_\_\_ (Parent's Name: \_\_\_\_\_)

"How long has it been since you've seen (doctor's name)?"

**Existing Patient:**  Check Balance  Schedule  Remind of payment due at appt.  Remind of timely arrival

**New Patient:** "I'm so glad you've called our office! Let me be the first to welcome you! I'd be happy to help you. (May I ask your name?) What motivated you to call us today?"

I want to be sure to schedule the correct appointment and reserve the proper amount of time (or... "give you the right information") so would you mind if I ask you a few questions first?"

**Symptoms:** "Are you experiencing any discomfort or sensitivity?" \_\_\_\_\_

- How Long? \_\_\_\_\_ Where? \_\_\_\_\_  Off/On  Constant  Night
- Swelling  Fever  Mobility  Pain on Pressure  Taking Pain Medication \_\_\_\_\_
- Sensitivity to:  Hot  Cold  Sweets  Accident \_\_\_\_\_
- Broken Tooth  Lost Filling  Crown  Bleeding Gums  Other \_\_\_\_\_

**History:** "When was the last time you had a complete set of x-rays?" \_\_\_\_\_

**Concerns:** "Are there any other concerns that you would like to discuss with the doctor?"

\_\_\_\_\_ "How long have you been bothered by /noticed / been concerned with (problem)?" \_\_\_\_\_



**Cosmetic:** \_\_\_\_\_

- Color \_\_\_\_\_  Shape \_\_\_\_\_  Chipped \_\_\_\_\_  Crooked \_\_\_\_\_
- Spaces \_\_\_\_\_  Crowns \_\_\_\_\_  Fillings \_\_\_\_\_  Missing Teeth \_\_\_\_\_



**Removables:** (Ill-fitting denture / partial) \_\_\_\_\_



**Fear / Anxiety:** \_\_\_\_\_



**Money:** \_\_\_\_\_



**Time:** \_\_\_\_\_



**Other:** \_\_\_\_\_

**Referral Source:**

"Who may we thank for referring us?" \_\_\_\_\_

- Patient \_\_\_\_\_ (Relationship \_\_\_\_\_)
- Professional \_\_\_\_\_  Marketing \_\_\_\_\_

"What was it about the (advertisement) that caught your attention?"

Discovery

**Repeat Symptoms / Concerns and Promote Practice:**

"(Patient's name), let me be sure I understand you clearly. It sounds as though (symptoms/concerns) is/are your main concerns. Does that sound correct? Is there anything else that would be important to you?"  
 "You've called the right place, (Patient's name). Let me tell you why... (Points of Excellence)

**Offer Solution / Appointment:** "(Patient name), I'd like to invite you in for what we call a Comprehensive (or Limited) Exam. Let me explain what we'll do for you on your initial visit. (Doctor) will begin with a comprehensive examination of your teeth and your gums. She/He'll pay particular attention to the area(s) you are concerned about. She/He will perform an oral cancer and blood pressure screening, as well. Then, (doctor) will discuss your personalized treatment plan and all your options with you as well as assess what type of cleaning you might need along with the appropriate amount of time. (Doctor) could see you for that appointment either (date/time) or (date/time). Which one would work best for you, (patient's name)?" (If not ready to schedule)  
 "Since you're not ready to schedule today, I'm going to send you our \$25 gift card to use when you are ready."

**Bullet Points:**

- Comprehensive Exam of Teeth/Gums
- Attention to Area(s) of Concern
- Oral Cancer/Blood Pressure Screening
- Personalized Treatment Plan
- Treatment Options
- Type of Cleaning Needed
- Set Appointment
- Offer gift card, if not scheduled

**Appointment Set:**  
 Date: \_\_\_\_\_  
 Time: \_\_\_\_\_

Solutions

**Insurance:** "Will you be receiving assistance from an insurance company?"  No  Yes (Ins. Verification Form)

**Quote Fee Range:** "This appointment ranges from (\$ fee) to (\$ fee) depending upon the necessary X-rays. We ask that you be prepared to take care of this fee at the time of your visit."

**Patient's Address:** "To save you time at your first visit and make sure you document any medications you're taking, I'd like to send/email you our Welcome Packet. May I ask for your address, phone number, and email address?"

Address: \_\_\_\_\_  Day Phone: (\_\_\_\_) \_\_\_\_\_  
 \_\_\_\_\_  Cell Phone: (\_\_\_\_) \_\_\_\_\_  
 Email: \_\_\_\_\_ Best number? \_\_\_\_\_

**Confirmation/Close:**

"Are you familiar with how to find our practice?"  Yes  No (Give directions if needed.)

"Have you visited our website yet?"  Yes  No

"Did I answer all your questions today? Is there anyone else in your family that I might schedule an appointment for today?"

"(Name), we have you (or Patient) scheduled for an appointment with (Doctor) on (date). Your appointment time is (time), however, your check-in time is (time). We've reserved this time especially for you. If for any reason you need to reschedule, would you please promise to call (your number) so that we can give that time to someone who is waiting? You've made a great decision and I'm looking forward to personally welcoming you into our practice. Thanks again for calling, (name)!"

**Remarks:** \_\_\_\_\_

Details