DISTANCE LEARNING COURSE

Telephone Skills Training
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OVERVIEW

The patient encounter in an ophthalmology practice most often begins with a telephone call to the practice. Approximately 80 percent of the patient’s first contact is by telephone. In this initial contact the patient will form either a positive or negative opinion of the practice.

This module provides essential information to help you understand the importance of telephone skills in delivering the highest level of customer service to patients. Training focuses on the basic guidelines for answering the phone, how to portray a positive image, improving voice characteristics and communication skills, basic telephone etiquette, tips for voice mail messages, and other methods for more effective use of the telephone.

FIRST IMPRESSIONS

First impressions create lasting memories, whether positive or negative. It only takes seconds for someone to decide if they like you or not. These decisions are formed by their impressions of simple actions. A pleasant greeting and a positive attitude will set the stage for each call.

The use of effective telephone skills creates a positive image for the entire practice. When all staff members consistently use appropriate telephone protocols throughout the practice, positive impressions will be created and customer satisfaction will be enhanced.

Quick Tips for Creating Positive Impressions:

- Implement a “two-ring” rule. Always make sure the phone is answered before the third ring.
- Project a positive, enthusiastic, and friendly attitude.
- Acknowledge the caller by name. Make him/her feel “at home.”
- Always be professional and courteous.
- Minimize customer hold time and return frequently to reassure they have not been forgotten.

TELEPHONE COMMUNICATION TECHNIQUES

The use of effective telephone communication techniques is critical in all telephone contact. The basic components include appropriate methods for answering the phone, transferring calls, putting calls on hold, taking messages, and recording voice mail messages.

Answering the Telephone:

- Answer the phone as quickly as possible (before the third ring).
- Use a friendly greeting, “Good morning” or “Good afternoon” and confirm:
  - Who the patient is calling: “Dr. Smith’s office.”
  - Who the patient is speaking with: “This is Mary.”
- Offer assistance, “How may I help you?”
- Smile when answering the phone (callers can “hear” your smile).
- Identify who the caller is and use the caller’s name.
- Be polite, use “please” and “thank you.”
- Be enthusiastic, this energy transfers to the customer.
- Listen to the caller, acknowledge requests or concerns.
- Treat every caller as though you are speaking to a friend.
- Stay positive, be considerate, show interest, and care.
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Transferring Calls: Provide an “escort” and stay with the call until it has been transferred.

- Identify who the call is for and who is calling, “May I tell the doctor who’s calling?”
- Let the caller know you are putting them on hold to transfer the call. “Please hold for a moment while I let Betty know you are on the line.”
- If the recipient is on the phone, ask if the caller would like to hold, leave a message, or be transferred to voice mail.
- Announce the name of the caller and inform them what the caller is asking about so the caller does not have to repeat himself/herself.

Putting Calls on Hold: Personalize the hold request.

- Ask the caller for permission to be put on hold and wait for an answer. “Hello, this is Mary. I have another call, will you please hold?” (Yes) “Thank you, I’ll be with you in a moment.”
- Remember who you put on hold and on which line.
- Return to the caller every 20 to 30 seconds. Thank them for holding.
- Ask the caller if they wish to continue holding or leave a message.
- When possible, alert the recipient that a call is holding; they may be expecting the call.

Taking Messages:

- Make sure you have the correct name and number.
- Ask the caller if there is a specific time they would like the call returned (many physicians want to take calls during lunch or between surgical cases).
- Ask the caller if they would like to leave a specific message.
- Repeat the number and message back to the caller.
- Assure the caller you will deliver the message, “I’ll give Dr. Jones the message and ask him to return your call.”
- Mark the message with the date and time of the call and sign or initial the message.
- Promptly deliver the message.

Each office has its own guidelines for answering the telephone. Make sure you know how your practice wants you to answer the phone and always adhere to practice protocols.

VOICE MAIL MESSAGES

Technology in today’s workplace continues to evolve at a rapid pace. It is uncommon to call someone who does not have personal voice mail. For the patient this provides an opportunity for them to leave a detailed message, explaining the reason for their call, what they need from you, when they expect to receive help, and much more. Frequently, when you are on the receiving end of voice messages, you find them to be lengthy, cumbersome, and unclear. Keep this in mind when you leave voice messages for others, especially for patients.

When communicating with patients via voice mail make sure your message is clear, effective, and friendly. Use the following guidelines to create effective voice mail messages.

- Keep messages as brief and concise as possible.
- Do not repeat yourself (state information one time).
- If a return call is needed, provide a direct phone number (if possible) and advise when you will be available for the caller.
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- Make sure your message is clear and to the point.
- At the end of the message, repeat your name, practice name, and phone number.
- Always say “thank you.”
- When you have the option, listen to your message before you send it. Record over the message, if necessary.

**IMPORTANCE OF A POSITIVE IMAGE**

Today’s patients are savvy. They are more knowledgeable and have higher expectations than yesterday’s patients. They want excellent service and high quality care, and they want it now.

To be successful in today’s highly competitive market, practices must meet the demands of their patients and deliver a quality product in an efficient manner. Staff members must respond to patient’s questions, concerns, or complaints with a positive attitude.

**It’s all about attitude!**

Approximately 70 percent of patients who decided to seek care elsewhere did so because of staff discourtesy. Staff may argue that callers perceive them as being discourteous because they are busy with other patients. Regardless of the situation, maintaining a positive attitude on the telephone translates to professional courtesy.

It is important to realize that the patient calling can’t see you and can’t appreciate what you are dealing with at that moment in time. The caller doesn’t know that you may have multiple phones ringing at the same time and other patients have been placed on hold so you can answer their call. It’s not the caller’s fault that you may be the only person answering phones at that time. They can’t change the fact you may have an irate patient on hold on the other line waiting for you to return to them and take care of their problem.

What they will remember and appreciate about you is:

- How they were treated during the call.
- How you made them feel.
- How you answered their questions and concerns.
- The “intangibles,” which they equate to good quality customer service.

*It is imperative to treat patients with respect. Give them more than they expect. Make their experience dealing with you and your practice as pleasant as possible!*

**Telephone Attitude:**

Put aside the challenges you may be encountering when the telephone rings and focus your energy on portraying a positive attitude. Use the following actions to help you:

- Put a smile in your voice. Place a small mirror at your desk as a friendly reminder to smile before you answer the phone.
- Look good to yourself. Self-esteem is the driving force behind attitude.
- Adopt a “Can Do Attitude.” Strive for excellence by going the extra mile.
- Exhibit positive thinking. Replace negative thoughts with powerful positive ones.
- Use positive language. People respond more quickly to positive words and kindness.
VOICE CHARACTERISTICS

The power of a person’s thoughts, positive or negative, contributes to their behavior and translates to a person’s tone of voice. An irate, aggressive, or frustrated voice tone sends a very negative message about your behavior. A neutral voice tone may be perceived to indicate the person is bored, tired, indifferent, detached, or unenthusiastic. A warm and friendly voice helps establish rapport with patients.

To maintain positive voice characteristics, remember the following:

- The caller should imagine you as smiling.
- **Inflection** makes your conversation interesting. Vary the tone of your voice to express an idea, mood, interest, etc.
- **Word distinction** should be clear and easy to understand; enunciate your words.
- Control your **rate of speech**; do not speak too fast.
- **Energy** in your voice reflects your attitude and enthusiasm.

Said differently, consider the following employment ads for the position of telephone staff:

“Seeking professional that is tired, bored, unenthusiastic, apathetic, and conveys an overall disinterest during the greater part of the day.”

OR

“Seeking individual who is energetic, creative, enthusiastic, and is consistently able to convey a desire and willingness to help customers.”

Which one would your patients prefer?

TELEPHONE ETIQUETTE

Whether answering the phone or making phone calls, the use of proper etiquette allows you to maintain a certain level of professionalism and deliver exceptional customer service. Use of appropriate etiquette ensures you will treat patients with respect and courtesy and provide a level of customer service that patients expect. It also allows you to treat patients as you would like to be treated. Talk to patients like you are talking to a friend and make them feel as if they are the only person you are taking care of at any given point.

**Top 10 List of Telephone Etiquette:**

1. Answer all calls with a warm, sincere greeting.
2. Be pleasant and interesting (don’t allow patients to think you are bored).
3. Manage expectations and sincerely apologize if expectations are unmet.
4. Listen without interrupting.
5. Respond with appropriate emotion (show enthusiasm or empathy).
6. Be polite and kind (genuine politeness is rare these days).
7. Appreciate a person’s time and respect it as valuable. Remember, patients have a choice and can choose to spend their time with a competitor.
8. Always make the other person feel important.
9. Avoid being condescending, even if you are asked silly questions.
10. Take time with everyone and do not rush someone off the phone. You want to encourage them to call again and schedule a return visit to the practice!
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Go the extra mile!

Going the extra mile for your patients means more than meeting their expectations – try to exceed them! By doing so you will have great job satisfaction and make a significant contribution to the success of your practice!

SELF-ASSESSMENT

You now should have a better understanding of the quality, traits, and requirements of successful telephone staff. Use the following self-assessment to rate yourself on the elements critical to excellent telephone communication.

Rate yourself on a scale of 1 to 10, 10 is the highest.

Rate and speed of voice. 

Initial tone at call opening. 

Clarity of thought and expression. 

Diction. 

Overall voice characteristics. 

Confidence and projection. 

Honesty and sincerity. 

Friendliness 

Listening ability. 

Vocabulary usage. 

TOTAL SCORE:

Results:  

0 – 39 You may want to take this course again.

40 – 79 You are on your way to achieving excellent telephone communication skills.

80 – 100 Great job! You have achieved excellent telephone communication skills.

CONCLUSION

The telephone is a critical element to practice success. Initial contact with your patients is most frequently made through a telephone call. Your patients (customers) are the reason your practice exists and the telephone is the main link to your patients. Your role in answering the phone is vital in satisfying customer needs and delivering the highest quality of care.
COURSE EXAMINATION

1. In most cases, the patient’s initial encounter with the practice is:
   a. Upon arrival at the office.
   b. By telephone.
   c. At the hospital.
   d. In the treatment room.

2. Which of the following telephone techniques will help create a positive image for the practice?
   a. Implement a two-ring rule. Always make sure the phone is answered before the third ring.
   b. Acknowledge the caller by name.
   c. Minimize customer hold time and frequently return to reassure the caller they have not been forgotten.
   d. Use automated answering system.
   e. All of the above.
   f. A, b, c.

3. If the recipient of a call is on the phone, it is best to alert them that a call is holding; they may be expecting the call.
   a. True
   b. False

4. The basic components of effective telephone communication include which of the following:
   a. Answering the telephone.
   b. Transferring calls.
   c. Ensuring there are adequate phone lines in the practice.
   d. Placing calls on hold.
   e. All of the above.
   f. A, b, d.

5. If you call a patient and reach their voice mail, it is best to only leave your name and phone number.
   a. True
   b. False

6. Which of the following is most important to meet patient demands and be successful in today’s highly competitive market?
   a. Provide free parking for all patients.
   b. Respond to patient’s questions, concerns, or complaints with a positive and professional attitude.
   c. Offer discounts on products.
   d. Provide a good selection of magazines and other reading material in the waiting room.

7. A neutral tone of voice may be perceived to indicate the person is bored, tired, indifferent, detached, or unenthusiastic.
   a. True
   b. False
8. Which of the following actions will help you portray a positive image on the telephone?
   a. Place a mirror on your desk to remind you to smile before answering the phone.
   b. Use positive language and display kindness over the phone.
   c. Replace negative thoughts with positive powerful ones.
   d. All of the above.
   e. A and c.

9. It is best to use which of the following actions if you are on another call when the telephone rings:
   a. Do not interrupt your existing caller and let the incoming call transfer to voice mail.
   b. Place the call on hold and answer the incoming call, "Hold please."
   c. Tell the incoming caller you are on another line and ask them to call back.
   d. Ask permission of the existing caller to be placed on hold while you answer the other telephone.

10. Which of the following are traits of successful telephone staff?
   a. The ability to maintain a rapid rate of speech.
   b. Putting a smile in one’s voice.
   c. Being honest and sincere with all callers.
   d. Using a neutral voice tone.
   e. All of the above.
   f. B and c.