

# Telephone Etiquette 101, Part 2

## SOUNDING AS GOOD AS YOU REALLY ARE

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Here are some rules to keep in mind whenever you or any of the staff answer the phone. Following these rules will go a long way toward ensuring your patients are satisfied with their chiropractic experience and stay with the practice over the long term:

### Answering the Phone

Always answer the phone by the second ring - never later than the third. If you can answer the phone on the first ring, do so. Everyone in the office should be diving for the phone if it rings more than twice. The greeting should be short, simple and upbeat. Always say your name when answering and remember that by stating your name, you are making a personal connection with the caller, which is priceless.

When giving your name, always say it in an "up" tone and remember to smile! Your tone conveys your enthusiasm and says that you are there to be of service to them.

Don't carry on two conversations at the same time. Why is it that when you are not on the phone no one needs you, but the minute the phone rings everyone wants to speak with you? Remember that the caller is unable to see what you are doing, while the person who is standing in front of you can. Simply acknowledge the person who is in front of you with a silent gesture, letting them know that you see them and that you will be right with them. If the person in the office has an immediate need and you need to place the caller on hold, always ask the caller if they can please hold before placing them on hold.

If you have to put someone on hold, never leave them there longer than 30 seconds. If you know it will be longer than that, offer to call them back and then do so ASAP. Thirty seconds can seem like an eternity and quite often the caller will deliver their message quickly rather than waiting. If you have to place someone on hold for a prolonged period of time, consider having a recorded message providing the caller with information about chiropractic and the services the office provides. If they have to listen to the message more than once, your message is too long.

There is no sweeter music to a person than the sound of their own name. Get in the habit of using people's names. (Be sure to create an agreement first to use their first name - "May I call you Jim?")

Always apologize for delays or errors. Take the responsibility if there is an error, even if it is a bit unclear as to who is at fault.

Never say "hang on" or "hold it." Use proper, courteous phrases to let people know what you are going to do with them, such as: "I am placing you on hold for a moment so that I can go up to the front desk to the appointment book." Remember that the caller cannot see you, so paint a picture for them.

Close conversations politely. Never just hang up. Say "Goodbye" or "It's been nice speaking with

you, Mr. Smith," etc.

Be very careful what you say in earshot of others when you are on the telephone. You don't want conversations taken out of context or misunderstood by a third party.

Personal calls are a necessary evil. That said, never take them at the front desk. Never yell at anyone in earshot of patients (probably not a good idea to do anytime), or discuss your problems with your spouse. Your life is your business and your problems belong to you. You are available to patients if they happen to mention something about their life being a little off. Keep yours to yourself.

### Taking Messages

When taking messages, always write them in a two-part NCR phone message book so that if the original message is misplaced or lost, the information can be easily retrieved. They can be purchased at most office supply stores. The message should always contain the following information:

- The date and time the call was received.
- The caller's name and phone number. Be sure to ask the caller to spell their first and last name; repeat it back to them to confirm that you spelled it correctly. Also repeat the phone number to ensure you wrote down the correct number.
- Indicate who the message is for; the person taking the message should sign it too, so that if the recipient has any questions they know who to speak with.
- Ask the caller what the call is concerning and write it in the space provided. If they caller says that the recipient "will know," politely let them know that if for any reason the recipient doesn't know, they may not return the call.

Have a written policy on phone calls that covers when the doctor can be disturbed and by whom, what time the doctor accepts calls and from whom, and create a frequent caller list. In an emergency, enter the treatment room quietly and hand the doctor a note with only the important information written there, wait for any instructions, and leave the room. As a side note, I would like to mention that I have been in several offices where the doctor asked to be interrupted every time there was a phone call for them. Just for a moment, pretend you are a patient and the CA interrupts your visit with the doctor and the doctor takes the phone call. What does this say to you as the patient? It says to me that I am not important and that my time is not valuable.

Deliver all messages to their proper place promptly (e.g., box, desk), even if it is the doctor's family member calling for the third time that day. I know that I have received calls from the doctor's partner asking them to have the doctor call them before they left the office for the day and not written it in the message book, and then realized after the doctor had left that I forgot to give them the message.

Of course, we would like to provide all things to all patients, but we know that is just is not possible. Many times the prospective patient hasn't a clue what they are even looking for. They have simply heard some terms thrown around about chiropractic and use them on the phone with you. You must really listen to the caller so that you can determine what they are really asking for and if your office is the best office to provide it. Do not answer questions that you don't know the answers to or that are out of your field of expertise. Know where to find the answer.

Learn all you can about the office you work at and the methods practiced by your doctor. It is recommended that if you are not a patient that you become a patient.

Learn to think on your feet with a phone in your hand. That doesn't mean make up the answers; it does mean *think*. Pay attention to what is being said to you. Show up for the conversation. Watch your attitude. People are sensitive to the tones of other people's voices. If you think you have been asked a dumb question, keep it to yourself. The only dumb question is one not asked. If the person on the other end of the phone is upset or angry, remain calm. It is not your patient's fault if your baby cried all night and you missed some sleep. Be alert and interested, and let your voice show it!

On a sad note, [Jim Rohn](#), "America's foremost business philosopher," passed away in December 2009, and I would like to close with an excerpt from his "Treasury of Quotes" from the section "Communication and Persuasion" : "You cannot speak that which you do not know. You cannot share that which you do not feel. You can not translate that which you do not have. And you cannot give that which you do not possess. To give it and to share it, and for it to be effective you first need to have it. Good communication starts with good preparation."

Remember that the words you use and your attitude can make or break a practice. If you would like a copy of Mr. Rohn's booklet (I've purchased multiple copies for this very purpose), please e-mail your request to me at [lisa\\_bilodeau@hotmail.com](mailto:lisa_bilodeau@hotmail.com) and put "JR" in the subject line. Be sure to include your mailing address.

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