



YOUR PRACTICE

## 9 Make-or-Break Criteria to Improve New-Patient Conversions

Quentin Terpstra

### WHAT YOU NEED TO KNOW

- Your ability to master new-patient phone calls can make or break your success over the phone, particularly with scheduling new patients ... and helping convince that caller who is gathering info, but isn't quite sure you're the one for them yet.
- Training your staff on these criteria is also a vital component of a staff-driven practice. It helps you take ordinary staff and create extraordinary results.

The first phone call is the most important phone call to any practice, and if you don't handle new-patient calls properly, you may be losing a lot of potential new patients. This is one of the key hidden sources of lost revenue I've found in practices all over the country.

In today's article, let's discuss the nine essential criteria to help you maximize your front-desk effectiveness and your lead-to-new-patient conversion rates.

In our mystery calls to chiropractic and integrated-practice front desks, we have isolated the key points where many practices fall short. Here are the nine essential criteria to ace new-patient phone calls:

#### 1. Answer the Phone Promptly

In most practices, the phone should be answered by the second ring. If it takes longer to answer, you may be missing out on potential new patients. How many people hung up before that phone was answered?

#### 2. Greet the Caller Correctly

Ensure that the receptionist clearly states the correct name of the practice, without rushing, mumbling or being too quiet. Do you have a set practice greeting used by everyone in your office?

### 3. Make a Personal Connection

It's essential to clearly share your name and make a personal connection with the caller. This makes the caller feel more connected and engaged, and shows a greater level of care and attention than speaking with a nameless entity.

### 4. Avoid Putting Callers on Hold

You should try to avoid putting patients on hold, but if you need to, do it briefly. Hold music should not last longer than two minutes, but honestly, I'd say you have about 30 seconds, tops.

New callers have no relationship with you, so they will easily judge you and bounce at this point. If their first interaction is waiting, it gives the impression there will be more of it - and an overall lack of attention.

### 5. Always Get Caller Information

Get the caller's name, phone number, and how they heard about the practice. These are key, basic *musts*.

If the caller says Google, ask a follow-up question: "What were you searching for when you found us?" This information helps track what marketing is working and what isn't; and shows if it was a direct search from an ad, referral or other promo piece or a keyword search that led them to you.

Eighty percent of people hear about you and then Google you before calling. Find out what made them Google you for maximum benefit.

### 6. Ask Why They Are Calling and Show Interest

Show interest in the patient and how you can help them. Find out why the patient is calling and what issues they're having. Engage with the patient and ask questions.

Bored, rushed, stressed-out receptionists do not build trust with new patients. How many potential patients went to your competitor - you know, the one who went the extra mile to make them feel cared for?

### 7. Gather Basic Health Information

Collect basic medical information such as the patient's insurance provider and any relevant health history. This information can help the team prepare for the patient's visit.

### 8. Provide Clear Information

Provide the patient with clear information about the practice and what they can expect during their visit.

### 9. Schedule the Appointment

After answering the caller's questions and collecting all the necessary information, schedule the appointment. You'd be surprised how often a call is ended after answering questions without this simple ask. Make sure to confirm the date and time, and provide the patient with any necessary

details before ending the call.

### Practice Pearls

Your ability to master new-patient phone calls can make or break your success over the phone, particularly with scheduling new patients ... and helping convince that caller who is gathering info, but isn't quite sure you're the one for them yet.

Following the nine essential criteria mentioned above can help ensure that your practice handles new-patient calls effectively, engaging patients and converting them into loyal customers.

Training your staff on these criteria is also a vital component of a staff-driven practice. It helps you take ordinary staff and create extraordinary results.

MAY 2023