



**OFFICE MANAGER**

# USER GUIDE



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## OVERVIEW

Call Box is a comprehensive solution to cultivate accountability and reduce inefficiencies in phone handling processes. Thousands of healthcare organizations leverage Call Box to capture more appointments, improve staff and location performance, enhance patient experience, and optimize marketing spend.



**CAPTURE MORE  
APPOINTMENTS**



**IMPROVE  
PERFORMANCE**



**ENHANCE PATIENT  
EXPERIENCE**



**OPTIMIZE  
MARKETING SPEND**

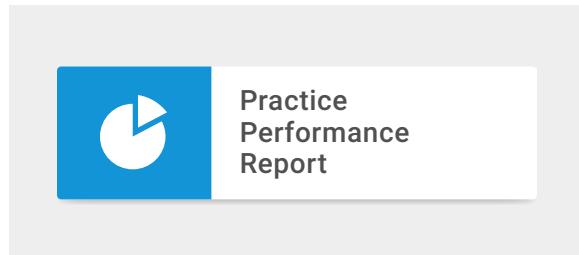
Office Managers use Call Box to hold staff accountable for their phone handling and track ongoing performance metrics. Call Box provides the necessary information for Office Managers to ensure marketing is driving the right amount and type of opportunities to the office via the phone. Office Managers should leverage Call Box's data daily, acting on missed opportunities from the previous day and assessing how the office is trending in asking for and booking appointments.

# RECOMMENDED USER HABITS

Call Box's reporting provides actionable insight for Office Managers to identify areas of opportunity. Office Managers are able to set goals for growth and hold staff accountable for ongoing improvement. Call Box recommends Office Managers review and take action on the following reports:

## PRACTICE PERFORMANCE REPORT

The Practice Performance Report provides an overview of key phone handling analytics rolled up into 4 distinct metrics — Connect, Request & Invite, Schedule, and Pursue — on both an office and individual staff levels.



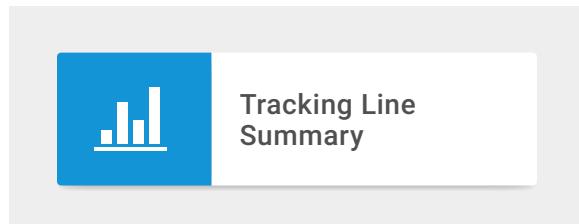
STAFF ACTIVITY							#	%	EXPORT
Agent	Appt. Opp (Total)	New Patient Opp   Existing	Appt. Request (Total)	Appt. Request (New)   Appt. Request (Existing)	Appt. Booked (Total)	Appt. Booked (New)   Appt. Booked (Existing)			
Taryn Keller	73	34%   66%	62	34%   66%	54	35%   65%			
Mike Lawton	67	24%   76%	64	23%   77%	61	23%   77%			
Amanda Franklin	28	39%   61%	28	39%   61%	24	39%   61%			
Ellie Thompson	74	55%   45%	34	59%   41%	31	47%   53%			

*Ellie is struggling to request the appointment and could benefit from coaching!*

- ✓ Uncover trend-based insight that allows Office Managers to make actionable and educated improvements in phone processes.
- ✓ Meet with staff weekly to review performance and open the dialogue to discuss strengths and weaknesses on the phone.
- ✓ Dive into the report early in the week to identify areas of opportunity for the week ahead — define a focus and outline what is required to achieve continued growth.
- ✓ Hold staff accountable for ongoing improvement on key phone metrics.

## TRACKING LINE SUMMARY

The Tracking Line Summary provides a detailed view of each source Call Box is tracking. Call Box recommends creating a new tracking line for each unique source to ensure accurate metrics and outcomes. This typically includes:



### DIGITAL MARKETING SOURCES

Website, Google, emails, social media, etc.

### TRADITIONAL MARKETING SOURCES

Mailers, business cards, newspaper ads, etc.

### MAIN LINE TRAFFIC

Contact Call Box for options to track main line.

### SPECIFIC WORKFLOW CALLS

Referring providers, call-back numbers, etc.

TRACKING LINE CALLS DATA								
Tracking Line ▾	INDIVIDUAL TRACKING LINE DATA				BRIDGE/EXTENSION TOTAL DATA			
	Calls ▾	Unique ▾	Connected ▾	Appt. Opps (New   Existing) ▾	Appts Booked (New   Existing) ▾	Minutes ▾	Avg. Duration ▾	
Main Line 214-123-5678	214	163	206	108   81	55   60	619	3:00	
↳ New Patients	81	61	78	70   4	28   18	234	4:21	
↳ Existing Patients	64	49	61	6   52	17   21	185	2:13	
↳ Billing	29	22	28	9   10	3   8	84	3:49	
↳ Operator	40	31	39	23   15	7   13	116	2:17	
Newspaper Ad 214-123-0123	137	114	131	67   36	52   32	466	3:56	
Google Listing 855-123-4567	136	98	114	56   37	40   31	275	2:41	
Facebook 214-123-3456	50	38	31	13   8	9   4	175	3:23	
Uptown Mailer 888-987-6543	22	19	17	96   7	85   6	47	5:15	

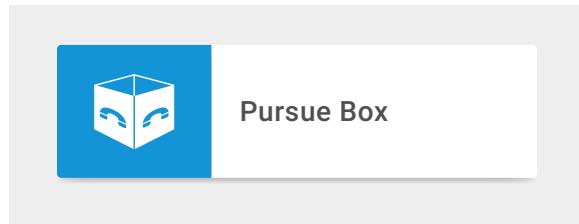
*This geographic area generated 85 new patient appointments from a mailer!*

- ✓ Pinpoint which sources are driving new patients and booked appointments to identify where to continue investing marketing dollars.
- ✓ Break down not only how many calls are coming in on each tracking line, but also the outcome of the conversation.
- ✓ Tweak campaigns based on transparent data and results.
- ✓ Track direct mail drops and keep tabs on digital marketing efforts to understand which geographic areas respond more favorably to which campaign approach.
- ✓ Ensure front desk staff is informed on specific campaigns and uncover gaps in communication of marketing efforts.

## PURSUE BOX

Pursue Box holds unbooked patient opportunities that require prompt attention and should receive an outbound call to book a firm appointment. These opportunities include:

- Declined appointments due to scheduling conflicts
- Declined appointments without a reason given
- Callers who were not invited into the practice



SEARCH ALL CALLS

### Pursue Box

2 Outstanding Pursue Opportunities ⓘ

Mon, June 24, 2019 - 11:43 AM

**Connected, Appt opp, New patient, Possibly discussed calendar, Not booked calendar**

Taryn Keller

214-567-3456 ● Jim Wilson

Online Listings ● 469-345-9012 ● Ext 2 (New Patient)

00:00 03:19

Mon, June 24, 2019 - 10:32 AM

**Connected, Appt opp, Existing patient, Not booked - no request**

Mike Lawton

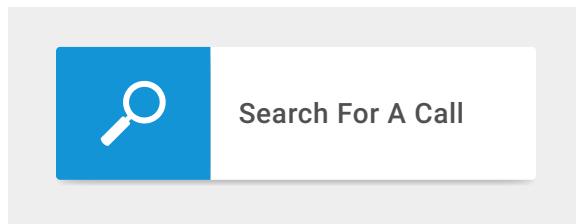
*Call this patient back to recapture the appointment!*

- ✓ Salvage potential appointments that otherwise would have slipped through the cracks.
- ✓ Check Pursue Box daily to see if there are any patients who weren't scheduled and require follow-up.
- ✓ Listen to calls to expertly handle any objections that may come up during outreach.
- ✓ Optimize provider schedules and ensure patients receive an ideal experience with the practice.

## SEARCH FOR A CALL

Search for a Call allows Office Managers to quickly find and listen to calls that meet particular parameters. These parameters include:

- Agent who handled the call
- Call type and outcome
- Date range the call occurred
- Tracking line the call came in on
- Patient phone number
- Keywords identified on the call



Agent

Don't Filter By Agent

Ana Williams

Andrea Smith

Chastity Becker

Denisse Kern

Gloria Thompson

Tags

Don't Filter By Tag

Outbound Live Call

Call in English

Call in Spanish

Appointment Opportunity

Didn't Connect/No Message Left

New Patient

Left Voicemail

Advanced

Start date: 6/17/2019

Through: 6/21/2019

Customer phone #: 888-888-8888

Keyword Search

Any of these words: urgent, medicare

All of these words: reschedule, appointm

**ADD CUSTOM KEYWORD**

All Tracking Lines Selected

**SELECT TRACKING LINES**

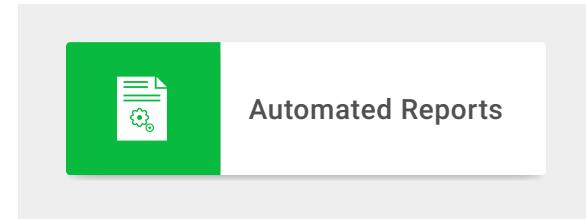
A green arrow points from the text "Search Ana's appointment opportunity calls handled last week to pinpoint strengths and weaknesses." to the "FIND CALLS" button.

✓ Search for both successful and unsuccessful calls and queue up recordings to play during weekly team huddles as prime examples.

✓ Pull call examples for staff members to hear what they sound like on the phone for ongoing coaching.

✓ Narrow down calls to only those that meet a particular search criteria to save valuable time whether for training purposes, marketing insight, patient complaints and more.

# RECOMMENDED AUTOMATED EMAIL REPORTS



Automated Reports allow Office Managers to receive any of Call Box's reports or call alerts sent straight to their emails on a daily, weekly, or monthly basis. This allows them to track ongoing phone metrics in a convenient and consistent manner, as well as quickly follow up with any patients who require an outbound call. Automated Reports are easy to share with others in the office and collaborate on mutual priorities.



DAILY, WEEKLY, OR  
MONTHLY REPORTS



TRACK PERFORMANCE,  
DRIVE RESULTS



EASY TO SHARE  
AND COLLABORATE



Call Box recommends Office Managers set themselves up to receive the following automated email reports and call alerts to consistently measure goals and identify areas of improvement:

## Build a new automated report

Customize your automated report to get the most important calls in your inbox. Add alerts for other calls, change the frequency of your alerts, or tack high-level performance reports to each email.

**1 Reports**

Select the report(s) you wish to include.



Tracking Line Summary



Practice Performance Report



Outbound Calling



User Engagement



Website Conversions



Agent Performance

**2 Calls**

What type of calls should we send you? Call alerts will let you listen to the audio recording and take action on each call.

*If you would like to receive immediate alerts each time a particular type of call happens, select Individual Call Alert in the frequency section and do not select any reports above.*

All calls

**Inbound**

Appointment Opportunity  
 Didn't Connect/No Message Left  
 New Patient  
 Left Voicemail  
 Left Live Message  
 Existing Patient  
 Appointment booked  
 No appt request  
 Not booked calendar  
 Not booked other

**Outbound**

Outbound live call  
 OB Appt. Booked  
 OB Appt. Not Booked

**Select Specific Tracking Lines** i

**Select Phone Code Groups** i

 PRACTICE  
PERFORMANCE  
REPORT

 TRACKING LINE  
SUMMARY

 INDIVIDUAL CALL  
ALERTS

# LEARN MORE



Tips & Tricks

Check out Call Box's Tips & Tricks resource to learn more best practices and tools for leveraging the phone.



Support

Have more questions about Call Box and how to best leverage its solutions?

**[Click on the Support resource or contact Call Box's Support Team at 214-446-7867.](#)**

