



Utah Dental Association
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GREAT Call™ Handout

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4 GUIDING PRINCIPLES FOR PHONE CALLS

1. How You Greet

- Speak slowly & clearly
- SMILE – yes, people can hear on the phone!
- Consistent greeting; introduce yourself and your practice

2. How You Listen

- Curious, with open-ended questions
- Actively & reflectively
- Verifying what you heard

3. How You Ask

- Getting permission
- Guiding into your schedule
- Getting commitment

4. How You Close

- Setting expectations
- Rephrasing commitment
- With excitement

MINDSET OF GREAT CALL™ PROCESS

The mindset of the GREAT Call™ process is most likely different than anything you are used to. In the dental field, we are trained to respond to every question and need of the patient, all with a smile on our face. This is still true today, however, we need to change the way we do it, or rather, the ‘why’ we do it.

The GREAT Call™ process is a prescribed process that builds trust in a new caller or an existing patient, with the desired outcome being a person that shows up, stays, pays and refers.

It is imperative that the person who answers your phones truly enjoys and takes ownership of this vital responsibility. The telephones are part of the “financial engine” of your practice and should not be left to chance.

THE GREAT CALL™ PROCESS

G – GREETING

This is the first verbal impression a caller has of your practice. It sets the tone for the call. How are you answering the phone? Is it consistently used by everyone who answers the phone?

Write down the greeting your practice uses for every phone call:

R - RAPPORT

This is the key element that transforms the “transactional” feel of a phone call into a “relational” experience instead. You build the connection that there’s a person behind the call. Using the person’s name, asking open-ended questions and actively listening will create a better call experience each and every time.

What are some open-ended questions that you ask that help build connection?

E - ENGAGE

This is the point where you get to share what makes your practice unique/special/the preferred choice for the person on the phone. Do your vision & values align? Is this the type of practice the caller is looking for? All-Star calls it “Sharing the Sizzle” - this is where you differentiate your practice from all the others! Share what is so awesome about your Doctor, Hygienist, Team, etc. Callers won’t know until you tell them! Put them on cards and laminate and have them easily accessible by each phone – use 1 or 2 every time!

Write down your Sizzle points:

1. _____
2. _____
3. _____
4. _____
5. _____

During the phone call you may get some pushback. Objections simply mean *“I do not have enough information – tell me more so I can make a decision”*. Acknowledge the objection and then let the caller know how you can help. What are some objections you typically get? How do you overcome these?

Make notes for future reference:

- ✓ Objection #1

- ✓ Objection #2

- ✓ Objection #3

A - ASK FOR APPOINTMENT

This is where most administrative team members get stuck! We are so eager to answer questions that we forget to ask for the appointment. Not getting enough new patient appointments reserved? It's most likely because callers aren't invited to make the appointment.

A word of caution: regardless of how much open time you have, only offer TWO options at a time. It's easy for a caller to get overwhelmed with too many choices and then decide to

“call back later”. Start first with “Do you prefer mornings or afternoons?” and then guide the caller into the best DAY for the practice.

Too many no shows or broken first appointments? Then getting the caller’s commitment needs to be re-evaluated because there isn’t enough VALUE being created for a person to feel connected to the practice.

Once the caller says, “YES, Tuesday at 9:00am works great for my schedule” then you’re ready to gather the necessary information to reserve the appointment.

T – TAKE THE INFORMATION

Now it’s time to gather the necessary information you need to complete the appointment. You already have the person’s name and phone number from the Greeting. Additional information could include a secondary phone number (highly recommended) and an email address.

If you want to LEVEL UP your service, direct the caller to your website to complete the forms at home. Of course, you’ll encounter those that forget or left them at home once they arrive, so you’ll always want a set of forms ready at the office.

WHEN NO APPOINTMENT IS MADE

- Always ask for the appointment even though not everyone will schedule and not everyone is a good fit for your practice. You **MUST** ask to get an answer.
- Even if the caller says, “I’ll call you back”, let the person know your schedule gets full and the type of appointment he/she asked about has limited openings. Level up your service by offering to follow-up in a few days (and then make sure you do!).
- Ask for an email address to follow-up or send information to a mailing address
- Get Permission to Follow-Up – *“Ms. Jones, I understand you are not ready to reserve that appointment right now. To help with your decision, may I email/send you some additional information and follow-up with you next week? I want to be sure that you are taken care of.”*
