

Years of Physician-Office Field-testing Has Led to the Ultimate  
"How-to" Approach for  
Improving Telephone Customer Service

**STEP-BY-STEP APPROACH TO**

# **IMPROVE TELEPHONE SERVICE**

**Package Includes:**

- ✓ Step-by-step Instructions
- ✓ Data Gathering Templates
- ✓ Excel Analysis Spreadsheets
- ✓ Power Point Presentation Templates



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## Telephone Service Improvement Program

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## Acknowledgements

Congratulations! By investing in MedicalGPS' Telephone Service Improvement Program your healthcare organization has demonstrated its genuine dedication to serving and caring for each and every patient in an extraordinary way, including providing the very best telephone customer service possible. MedicalGPS®, LLC welcomes you to the growing family of healthcare organizations leading the healthcare industry to a higher-level of patient-centered care.

Fred Lee, the author of the best selling book, "If Disney Ran your Hospital 9 ½ Things You Would Do Differently", states,

***"There are three levels of caring –  
competence, courtesy and compassion."***



It is our sincere desire that each of your patients will experience that highest level of care – compassion -- including their experiences when receiving assistance and information via the telephone. MedicalGPS' motto is:

***“If it’s good for the patient,  
it’s good for the business”.***

Thank you for allowing MedicalGPS to assist you and the other healthcare professionals within your organization with that passion and mission.

We hope you and your staff find MedicalGPS' Telephone Service Improvement Program empowering; both as a way to create that favorable memorable experience for your patients, and as a way to increase workflow efficiency in your quest to sustain a culture of continuous -- patient-centered -- quality improvement.



## Overview

The essential basics for analyzing, and ultimately re-designing workflow related to the telephone process within physician practice organizations involves; 1) facilitation by leadership, 2) physician collaboration, and 3) support staff buy-in. Following MedicalGPS' step-by-step process will ensure each of these essential components is adequately addressed.

**!Vital:** Much of the data gathering and data analysis will require familiarization with certain MedicalGPS' tools and templates in the form of pre-formatted excel spreadsheets, power point templates, and other digital materials.

End-users with **intermediate computer skills** will easily navigate MedicalGPS' "do-it-yourself" tool-kit contained in the Telephone Service Improvement Program.

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## Setting the Stage

Through more than a decade of real-world clinic field-testing, MedicalGPS' Telephone Service Improvement Program has demonstrated that both telephone customer service **quality** as well as workflow **efficiency** can be simultaneously improved.

Before moving into the "how-to" of the program, let's first define service quality. Assuming most organizations do not desire to be rated simply as "good" let's set the service quality benchmark for something better than good -- let's call it excellent or perhaps outstanding. So, what is excellent or outstanding telephone service quality? Outstanding service is not just answering the phone within three rings, as has often been described, although a prompt answering-time is part of the equation.

Outstanding telephone service should include the patient obtaining the information they need during the **first point of contact** when calling into the office. A more comprehensive, yet

concise, description of outstanding telephone service might read something like this:

***Support Staff answer the telephone promptly, provide the desired information accurately, and do it in a warm, friendly, and professional manner.***

Of course providing the information the patient needs every time at the first point of contact cannot always be achieved 100% of the time, however, significant improvements can be made in most physician offices when understanding how to better match the skill-set of the person answering the telephone with the nature, or type of incoming telephone call. A goal of at least 85% is achievable, provided there are adequate resources and efficient processes in place to support that level of service quality.

Perhaps you're thinking what many healthcare administrators have thought when first presented with the prospects of providing the patient with the information they need at the first point of contact.

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***“Our office would love to staff the phones so that most calls are processed at the first point of contact. Unfortunately, to do so would mean we’d need to add support staff – that’s something we cannot afford”.***

That initial response is characteristic of what we often hear – at least when beginning the re-design process. By re-designing the existing process, which includes eliminating redundancies and better matching the skill-set of the person answering the telephone with the patient’s needs, both service quality as well as process efficiency improves. As a result of the increased efficiency, in most circumstances, the existing support staff can usually adequately support the re-designed process, eliminating the need to hire additional staff.

When MedicalGPS’ Telephone Service Improvement Program is implemented effectively, patient satisfaction improves, process efficiency increases, and oftentimes, same-day open appointment slots are filled that might otherwise go unfilled.



## **Preparing to Start**


### **Establish the Re-design Team**

Before beginning the re-design process, establish the process redesign team, led by a member of senior management, and championed by an influential, respected physician currently practicing within the area undergoing the re-designed process. Other team members should include at least one representative from each of the following job functions, “nursing”, “reception”, and of course, “appointment scheduling”. Keep the re-design team to a manageable size of 5 to 6 team members.

**!Vital:** Before proceeding to Step #1, the senior member of management leading the re-

design process should be completely familiar with the contents of this package, and be prepared to articulate and otherwise lead the re-design team members through the four major steps as listed below:

1. Data Collection - Measure and assess the current telephone workflow
2. Analyze the Findings - Identify potential process improvement opportunities
3. Prioritize the Next-Steps - Re-design the process using the 80/20 Pareto Principle
4. “C.P.C.” Communicate, Participate and Celebrate!

 **TIP:** Set expectations early in the process that there is NOT a “magic bullet” when it comes to telephone process re-design. Communicate clearly to members of the organization that much time, energy, and cooperation will be required to successfully, and permanently change the existing processes.



## 1. Measure And Assess The Current Telephone Process

Understanding and objectively measuring the effectiveness and efficiency of the existing telephone process allows the re-design team to stay focused. Otherwise, if subjective information (opinion) is the sole source of decision-making information, re-design efforts may be inadvertently misdirected. While subjective feedback is important, blend it with empirical/objective data. Start the objective data collection process by capturing incoming telephone call volumes. Incoming calls should be measured by call type, time of day, and day of week. In addition, and perhaps the most important, the disposition or action-taken for each call should be captured as part of the telephone intake process assessment. Obtaining **call disposition**, or the action-taken, **is the key** to understanding the effectiveness of the existing

process, and in identifying potential opportunities for improvement.

The primary emphasis of the Telephone Service Improvement Program is to redesign the telephone process so that incoming telephone calls are answered promptly, AND are actually handled at the first point of service or opportunity, a very high percentage of the time.

As the incoming telephone process is re-designed your office will begin to experience an environment of improved efficiency, which results from handling the majority of the inbound telephone calls when the telephone is initially answered. The overriding theme of the Telephone Service Improvement Program is:

- Minimize call transfers
- Minimize message taking
- Minimize “phone-tag” with the patient
- Maximize the number of calls processed at the first point of opportunity, when the call is initially answered