

# A Guide to Excellence in Telephone Etiquette

Susan A. Resnick, O.D., FAAO, FSLs  
New York, NY



# Course Objectives

At the end of this course, you will be able to:

- ★ Greet patients on the telephone with professionalism and enthusiasm
- ★ Place patients on hold in a courteous manner
- ★ Transfer patients to the correct extension effortlessly
- ★ Take accurate messages and ensure appropriate action
- ★ Gather and record necessary prescription information
- ★ Calmly handle disgruntled patients
- ★ Assist your doctors in drafting uniform scripting for the team

# What is Phone Etiquette?

- ★ Phone etiquette is the way you use manners to represent yourself and your business to patients via telephone communication
  - way you greet a customer
  - your body language
  - tone of voice
  - word choice
  - listening skills
  - how you close a call

# Importance

## TELEPHONE ETIQUETTE

A matter of using courtesy and good manners.



- ★ How does telephone etiquette impact patient impressions?
- ★ How can good etiquette benefit practice success?
- ★ Did you ever discontinue doing business with a company because of its telephone customer service?
- ★ Do you ever procrastinate making your own doctors appointments due to the dread of being put on hold for an eternity?

# The Power of Positivity

- ★ Phrasing
- ★ Always start with a positive phrase
- ★ Use “how and we”
- ★ Avoid Negative Language

# Breathe and Smile!



A smile can  
“translate”  
through the  
phone, causing  
your voice to  
sound friendly  
and warm.

## ★ Prepare to Answer the Call!

- Stop attending to the task you are currently doing
- Make sure you are not eating, drinking, or chewing gum
- Take a deep breath and clear your head

## ★ Speech and Tone

- Speak clearly
- Speak Slowly
- Smile while you are speaking

# The Voice



- ***Diction*** – Diction relates to the proper pronunciation of words that allows others to understand clearly.
- ***Pitch*** – Pitch refers to the sound of the voice.
- ***Tone*** – Always speak with a positive and respectful tone.
- ***Enunciation*** – Clarity of speech
- ***Loudness*** – Volume
- ***Speed*** – The pace of speech

# The Greeting

- ★ The Greeting
  - “SeeMore Vision Care”
  - Good Morning/ Afternoon/ Evening
  - This is \_\_\_\_\_
  - How may I assist you?





# Attitude and Energy



- ★ Manage the “Noise”
  - “Noise” is any kind of distraction
    - Many calls coming in at once
    - Interruptions from co-workers
    - Interruptions from patients in the office
    - Personal/family issues
- ★ Try to Feel Happy
- ★ Try to Maintain a Professional and Energetic Demeanor



# First Listen, Then Speak

- ★ Focus on what the patient is saying.
- ★ Limit your own talking.
- ★ Keep any “scripts” handy by the phone.
- ★ Use reflective phrases
  - These are used to encourage a patient to elaborate
    - “Mr. Smith, you mentioned....”
    - Begin your next question with “who, what, why, how, where, or when”

# Best Practices

5 Important Rules  
Of Proper Telephone Etiquette



- ★ Answer a call within 3 rings
- ★ Immediately introduce yourself
- ★ Speak clearly
- ★ Only use speakerphone when necessary
- ★ Actively listen and take notes
- ★ Ask before putting someone on hold or transferring a call

# Placing a Patient on Hold/Multiple Calls

- ★ Ask permission to place them on hold
- ★ **If the patient agrees:**
  - Quickly address their situation
  - Let them know you will return momentarily
- ★ **If the patient does not agree:**
  - If it's a call you have already started, complete it.
  - If it's an incoming caller, let them know you are helping another patient and ask if you can return their call shortly OR
  - Ask them if you may transfer their call to another team member

# Polling Question #1

Diction refers to:

1. Voice Volume
2. Speed of Speech
3. Word Pronunciation
4. Tone of Speech

# Transferring a Call

The Blind Transfer

The Handoff

The Live Transfer

# The Blind Transfer

- ★ When you transfer the caller directly to someone's extension without any kind of heads up or introduction to the person the caller wants to reach.
  - If you are going to transfer to a VM be sure and tell the caller
    - If they need immediate assistance you can determine who else may be able to help

# The Hand Off




- ★ Obtain permission from the caller to place them on hold
- ★ Verify that someone is available to assist the caller
- ★ Give your team member all necessary background
- ★ Transfer the caller, addressing them by name and thanking them for their patience

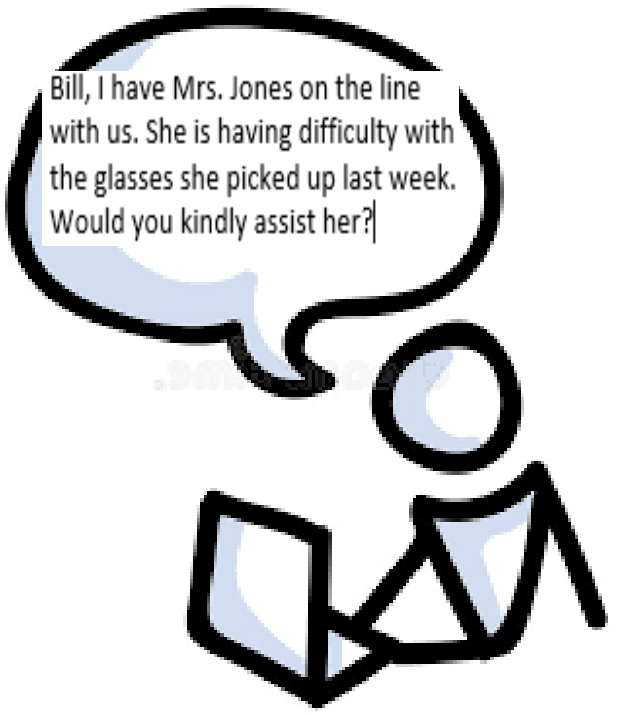


# The Live Transfer

- ★ When might you want to stay on the line with the caller when you transfer them to the next person?
  - If the caller is upset and does not want to hold
  - If the reason for the call is complex
  
- ★ Quickly inform the party you transfer the call to that the caller is currently on the line.



"Mrs. Jones, I am going to transfer you to Bill in our Dispensary to assist you with your glasses. I will stay on the line to be sure we reach him."



Bill, I have Mrs. Jones on the line with us. She is having difficulty with the glasses she picked up last week. Would you kindly assist her?]

# Message Taking: Key Points

- ★ Get the person's name early on in the conversation and use the name often in the conversation
- ★ Route them to the appropriate team member
- ★ Facilitate the prompt return of all patient and business calls

# Message Taking Protocol

- ★ Inform caller that the person they wish to speak to is not available
  - Only give general information about why the person being messaged is not available
- ★ Use duplicate copy phone message pads
- ★ Determine the urgency of the call
- ★ Note action needed; eg. patient will call back or expects return call
- ★ Best time to return call OR when they can expect a call back

# Message Recording

- ★ Date and time of the call
- ★ Name of person the message is for
- ★ Name of person calling
- ★ Return phone number of person calling
- ★ Reason for the call: Always ask permission to get this information
- ★ Person taking the message

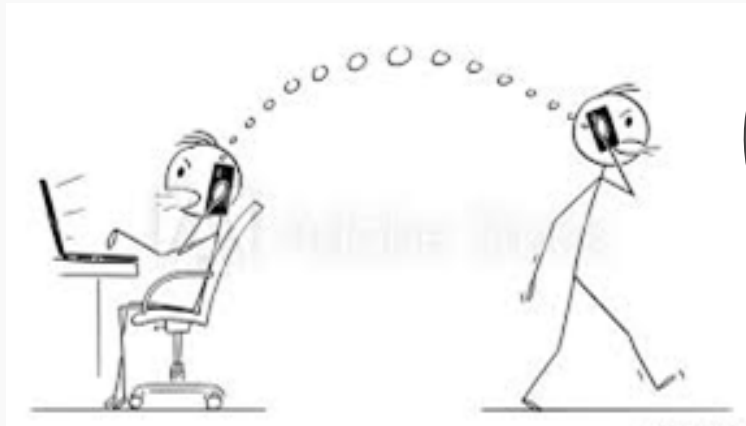
The image shows a pink message recording form titled "While You Were Out". At the top right, there is a tab labeled "Urgent". The form includes fields for "FOR" (Name), "DATE" and "TIME" (Time), and "BY" (Name). Below these are checkboxes for "TELEPHONED", "CAME TO SEE YOU", "RETURNED YOUR CALL", "PLACED CALL", "WALL CALL AGAIN", and "WANTS TO SEE YOU". There are also fields for "PHONE", "CELL", and "FAX". A section labeled "Message" has several horizontal lines for writing. At the bottom, there are fields for "CALL" and "SIGNED".

# Message Return Calls

- ★ Return messages in a timely manner.
- ★ Do not make phone calls before 8 am or after 9pm.
- ★ Allow at least 8 rings before hanging up.
  - When answered, give your name and whom you represent. State the reason for your call.
  - Ask if this is a good time for the call. For example: “Is this a good time for you to talk with me, or should I call back?” If not, ask when you can call back.
- ★ Always leave a message if possible if there is no answer.

# Scheduling the “Add-On”

Mrs. Smith, I am just adding a couple of notes to your file regarding the difficulty with your left eye



Thank you for your patience, Mrs. Smith I have noted your symptoms in the file so when you arrive later today the doctor will be aware of them. We look forward to seeing you later.

# The Graceful “Sign-Off”



- ★ Before ending a phone call, make sure the other person understands what is being communicated by summarizing the conversation before hanging up.
  - Thank the person for calling.
  
- ★ Allow the other person to hang up first.
  - Hang up “gently”



# Polling Question #2

The “handoff” refers to:

1. Not working with a patient you don't like
2. Transferring a call to a colleague after giving them background
3. Transferring a call to a colleague without giving background
4. Sharing a snack

# Customer Service

Why: It's Necessary to Rebuild a  
Relationship

Goal: The Best Outcome for the  
Patient and the Practice

# Is the Customer Always Right?

- ★ Well...Yes and No!
- ★ They may not always be right
- ★ BUT.....
  - They do have the right to be heard
  - They have the right to expect excellent customer service
- ★ Allow the patient to vent
- ★ Acknowledge and validate their frustration
- ★ Paraphrase or repeat back their complaint to confirm your understanding
- ★ Ask them what they would like to see happen



# Keep Your Cool



- ★ Even when a patient is angry and their anger is focused on you
- ★ Use a professional, calm and attentive tone
- ★ Ask for the patience while you try to resolve the issue
- ★ Do not take it personally
- ★ You will likely have an emotional response

# You Want Me to Do WHAT?



- ★ Sometimes you are asked to do something you cannot do
  
- ★ Do your best to reset expectations
  - When able, provide the patient with a document that outlines your policy and answers any additional he or she may have.

# The Endless Phone Call



- ★ The patient is keeping you on the phone for too long.
  - Give each patient your utmost attention and dedication to their problem, but be mindful of how long you're on the phone with them.
  - When you're no longer making any significant progress on the case, ask to follow up with them.

# The Demand for a Manager



- ★ The patient is demanding to speak with a manager.
  - One strike rule
  - You are the best person to handle their problem
  - Involve manager then or follow up

# Prescription Requests

## *Prescription Requests*

*Please ask for a repeat  
prescription at least 2  
working days (48 hours)  
before you  
need it*



- ★ Document the following information on duplicate copy prescription message pad
  - Patient Name
  - Name of prescription drug
  - Dosage
  - Strength of drug
  - Prescription Number
  - Pharmacy Name and Phone Number
  - Any medical allergies



# Prescription Refills



- ★ Explain when the refills will be transmitted to their pharmacies at the end of the workday.
- ★ Ask for number where patient can be reached at the end of the day if needed.
- ★ Pull patient's medical history record, attach request to outside of chart.
- ★ Transfer to the pre-established place for pick-up by medical assistant, so the request can be reviewed with optometrist.

# Handling Telephone Inquiries

- ★ A caller asks for the doctor's qualifications.
  - What would you say?
- ★ Another doctor asks to speak with the doctor.
  - What would you say?
- ★ A new patient asks some questions you can't answer regarding a new treatment.
  - What would you do?

# The Inquirer

- ★ Caller inquires about your practice...is “shopping” for a new doctor
  - Is not ready to make an appointment
  - What would you say?
  - What would you do?
  
- ★ A patient asks to speak with the doctor
  - What would you say?

# Handling the Emergency Patient

- ★ Every effort should be made to accommodate the urgent or the emergency patient.
- ★ How soon should the patient be seen?
- ★ Do not attempt to diagnose and treat over the phone.
- ★ If you are unfamiliar with the particular situation, pass the decision along to staff member with more experience.

# Documentation

- ★ Document all telephone calls relating to patient care.
  - Any telephone contact with a patient, the immediate family, or another health care professional concerning a clinical issue will be recorded on the “Patient Contact Form”
  - The Patient Contact Form is not used for contact with the patient during an office encounter.

## Patient Contact Form

Patient Name: \_\_\_\_\_ Doctor: \_\_\_\_\_

Date	Time a.m./p.m.	Detail of Contact	Signature

# Polling Question #3

Which of the following is NOT needed for a prescription refill request?

1. The patient's name
2. The patient's pharmacy
3. The name of the drug
4. The current prescription expiration date

# Recap

Answer the call within three rings.

Immediately introduce yourself.

Speak clearly.

Only use speakerphone when necessary.

Actively listen and take notes.

Use proper language.

Remain cheerful.

Ask before putting someone on hold or transferring a call.

Be honest if you don't know the answer.

Be mindful of your volume.

Check for and respond to voicemails.

**Treat every call like the first call!**

[sresnick525@gmail.com](mailto:sresnick525@gmail.com)

[www.eyewise.com](http://www.eyewise.com)

**THANK YOU!!**