# CallSource®

# Call Management Guide | Healthcare

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# Introduction

For companies like those in the healthcare industry that have an appointment-based business model, the phone plays a vital role. Products or services cannot be sold solely on the internet or in brick-and-mortar stores. Potential patients must phone your business and engage with a real person to book an appointment for the patient to be helped and before the sale can be made.

Healthcare practices' marketing campaign ads are not limited to digital advertising. Appointment-based businesses use many advertising channels in addition to digital, including TV, radio, and direct mail. Digital attribution is a built-in part of online marketing, but offline attribution must come into play as well for a holistic view of your marketing analytics. Appointment-based companies need to track incoming phone calls to determine what channels drive patients to call, and which ads generate qualified leads.

Determining where to spend your marketing dollars successfully should be based on the data that you receive to determine your ROI. Should you keep advertising with Campaign A, or reallocate that marketing budget towards Campaign B that generated more leads with a lower cost-per-lead investment? In a world with so many advertising options, it is imperative to make data-based decisions and not rely on anecdotal information.

Call management helps companies understand how their phone lines and offline marketing attribution impact their overall marketing and company success. The phones are a vital step in consumers' buying journeys; they must not be ignored. Having a call management system in place is essential to make informed marketing decisions based on real data, not assumptions, of marketing and employee performance.

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# What is the basis of call management?

The backbone of call management is your phones. However, it does take more than having phone lines for effective call management. The foundation of any successful call management system is **call tracking** or call recording.

Call tracking, which was invented by CallSource in 1991, is how data is gathered to aid marketing professionals in determining the success of their phone-driven marketing campaigns. At its simplest, call tracking requires creating and then publishing a unique phone number (local or toll-free) for each marketing campaign that you want to track. Ideally, this includes all of your distinctive ad sources: your website, television advertising, direct mail campaign, etc. Each unique phone number is routed to your main line(s).

When a potential patient calls in to each these numbers, detailed information including the caller's phone number, name, address, connection status, duration, and more are automatically captured, and the call is recorded. The call recordings can be listened to almost immediately for review.

As vital as it is, call tracking is the tip of the iceberg when it comes to call management. Analyzing a phone call provides robust analytics for marketing and operations managers alike. Leaders can improve in all departments with more detailed analytics about each phone call.

It is impractical for a staff member to review all your recorded calls and score call handler conversion rates. This is why appointment-based companies rely on call processing systems to do the dirty work for them. Call processing delivers insights into what channels consumers are calling from and also how the call was handled internally and what the outcome of the call was: did it end in an appointment, or was it a lost opportunity?

Don't be fooled; not all call processing companies are alike. Some call management systems utilize speech analytics to deliver more data about the phone call; this is inadequate for determining a call outcome as the technology is not quite there. Tone, nuance, and people's accents are not understood by computers. 100% accuracy is simply not available with AI software like speech analytics. It is reported that speech and voice-to-text analyses only reach an accuracy of 77%,[1] while CallSource's human analysts come in at upwards of 95% accuracy. When choosing a call management system to process your calls, you need human analysts that can truly determine call outcomes.

By diving deeper with these advanced call management systems, you can make more informed decisions to better your business.

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# How do I figure out if I need a call management product?

Simply put, if your business depends on the phone at any point in the patient journey to make an appointment, you will benefit from a call management system. Here's a simple assessment to determine if call management is right for you.

## 1 My practice follows an appointment-based model.

Patients must make an appointment to come into your office. Although some businesses may adopt an online/form appointment booker, most consumers will still choose to call in and book an appointment over the phone by speaking to a live representative. Phone traffic to appointment-based companies has increased fourfold in the past several years due to click-to-call on smartphones. Within local services, 76% [of potential patients] would use call features to schedule an appointment for professional services.[2] Regardless of your marketing spend, you have one chance to turn a caller into a potential patient. Understanding your call-to-appointment rate is vital to the health of your practice.

## 2 My practice has a dedicated call handling team to answer inbound calls.

Your office has a front office staff answering phone calls and speaking to patients or uses a call center. When you're paying employees to handle phone calls, you need data to understand call outcome rates.

If booking three more appointments a month without increasing more marketing spend can improve your profitability, it is imperative to use call processing.

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### My practice relies on repeat patients.

If your business model depends on return patients (regardless of frequency), then every new patient requires nurturing over time. Patient service is the key to creating loyal patients. Call analytics will help you determine repeat patients to market and speak to as an existing patient rather than a potential one.

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### In-person appointments are required to make a sale.

If making a sale requires patients to come to your business as in the healthcare industry, then phone handling and appointment booking rates (taking into account no-show rates) are imperative to understanding your true marketing ROI. If booking three more appointments a month without increasing more marketing spend can improve your profitability, it is imperative to use call processing.

# What should I look for in a call management vendor?

**Although call tracking has been around since CallSource invented it over 25 years ago, many other call management-type solutions have popped up over the years. When researching companies, cast a wide net and narrow down your choices based on criteria that matter to you.**

**Below are a few items to consider during your evaluation.**

## Experience

Make sure that the company you choose has experience. There are a lot of fly-by-night call tracking companies that appear in the industry and disappear just as quickly, leaving you in a lurch as your phones are simply not ringing. Call tracking is no longer an innovative technology; many companies and CRMs have adapted using call tracking as a part of their services. Having the capability to record a call does not mean they understand call processing and have the ability to support your business' goals. Ensure that the company you choose has been in the industry for a while, is financially secure, and will provide the right level of patient services that you need.

## Reliability

When a company is partially responsible for handling your phone lines and delivering phone numbers for your business, you want to make sure that they will be reliable and working. Just like Verizon and AT&T dominate as phone carriers for most mobile phone services, make sure your call management provider has a good phone carrier presence with quality phone routing.

Besides reliable phone routing, make sure that the website uptime reliability for your provider is top-notch. Website downtimes mean you cannot login to view your data.

Finally, is the data reliable? Does the vendor score calls based on algorithms that may not fit your actual phone calls? Do they use speech analytics or human call processing? If your call handlers are self-scoring, using a third party call processor will give you unbiased data. Make sure to get answers to your questions about reliability. A reputable call management company will have no problem answering who is scoring your calls and how. Don't make critical business decisions from unreliable data.

# What should I look for in a call management vendor?

## Customer Service & Onboarding Process

Implementation of a management platform and maximizing it to improve your business requires commitment on your part as well as your provider.

Implementing call tracking or call management is likened to buying a gym membership — you only see the results of getting fit if you commit yourself to making a change. Fortunately, call management doesn't take a toll on you physically — but you do have to put the initial time in to make it work.

It is vital that the vendor you choose has excellent customer service and dedicated representatives to your business, especially during your onboarding phase. As you move through the onboarding process and you have published your phone numbers, a dedicated representative should be there to help you understand your data. Receiving data is just another report if you don't turn it into actionable and achievable goals.

## Industry Knowledge

Some call tracking vendors focus on specific industries as their specialties in the call management sphere. When you are in a niche industry that needs specific industry knowledge, make sure your call management vendor can provide you with what you are looking for before deciding to hire that firm.

A reputable call management system should be able to provide proprietary data to compare your business to others similar to yours. This gives you benchmarks and confidence that your office staff understands your needs and goals.

# What should I look for in a call management vendor?

## Pricing

Just as all call management providers aren't created equally, neither are their pricing models. Find out what products you would benefit from and at what point they recommend you using each product. Buying all offered products at one time can be overwhelming. You can also be paying for products you don't need yet. For instance, if you are looking for a call performance solution based on conclusive information for your employees or call handlers, you need a baseline of information before implementing an improvement strategy.

Find a vendor that will create a pricing structure with you based on your call management goals. Be wary of contracts that lock you in; find a flexible, month-to-month solution that allows you to cancel any time, but is confident enough in their services to know that you'll want to stay with them.

## Integrations

It is important to make sure that the call management provider you choose can integrate or push data into your existing platform. You want to ensure you'll actually utilize the data – not just let it sit in another sphere that you only look at from time to time because you feel too overwhelmed.

Choosing a call management provider doesn't need to be daunting; make sure you are clear on what you want to achieve when trying to find the right fit. Remember, call management should augment your business and make life easier for you, not more cumbersome. The above suggestions aren't an exhaustive list, but a starting point to use when speaking to different vendors.

# What should I do before implementing a call management program?

Once you determine the call management provider, be sure to read the following section before implementation.
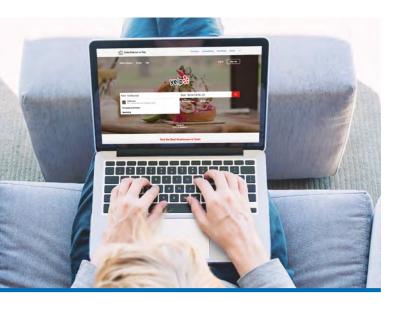
## Define specific goals for your call management system

Create specific SMART (Specific, Measurable, Achievable, Relevant & Time-bound) Goals you want to achieve with your call management system.

## Make a timeline for yourself for achieving your goals.

If you don't know where to start, answer why you want to purchase and implement call management and work backward. Discuss your goals with the call management vendors you are deciding between and validate your timeline with them. If they don't take an interest in your goals or your business before they make the sale, it is indicative of the support you will receive later in the relationship. If your vendor isn't helping you in making the right decisions, it's probably not the right call management system for you.

## Team buy-in and excitement

Remove ambiguity from your team. Explain to your call handlers and office manager(s) how and why you are implementing call management. Call handlers can have anxiety over having their calls recorded or monitored; it can feel punitive if not approached appropriately in the beginning. This can change your desired company culture.

Designate a call management team to train them on your "why." This teach-the-teacher system will create transparency. Create clear expectations of responsibilities and accountability with regards to the reports and data each person will use and how to create a system for a feedback loop to find out what is working and what is not. Remember, negative feedback isn't bad as long as it is constructive. Your employees who are answering the calls are closest to your new call management system; their feedback is needed for success.

## Look at online reviews

Before purchasing your new call management system, look at their online reviews and testimonials. Some great review platforms to read reviews for call tracking and management companies are G2 Crowd, Google, and Capterra. Consult industry groups and talk to peers who may use call management platforms and find out first hand what they do or don't like about who they use.

# How call management will improve your business.

Since 1991, CallSource has been working with call tracking clients, and has created a myriad of products at our clients' request. From Tier 1 companies to small mom-and-pop businesses, our call management system has helped a multitude of our clients improve marketing spend, advance call handler performance, and ultimately increase their appointment conversion percentage and their bottom line.

First, using a call management system keeps you informed. Major decisions should not be made without using sound data. By habitually reviewing your call analytics reports and scheduling regular meetings with your call management representative, you are committing time to improve your business. Once reviewing your call management data becomes a part of your regular work routine, you can easily spot areas where you are excelling and hitting your KPIs, as well as areas you need to improve.

Utilizing a call management system also improves your bottom line. Allocating marketing dollars to advertising effective channels rather than wasting budget on ad sources that are underperforming will maximize your marketing spend. Call processing ensures your call handlers are increasing call-to-appointment rates and improving call handling skills.

Finally, a call management system helps owners and managers use data-driven forecasting. Discover peak times for inbound calls by looking at your past data to stay prepared for upcoming seasons. Seasonal trends in advertising will also become apparent when reviewing data over time. Creating benchmarks and evaluation periods when trying new channels will also help you make more informed business decisions. By decreasing wasteful spend, you will stop leaving money on the table. If you decide to combine your call management system with a digital attribution management system (which CallSource also provides), you get an even clearer picture of your patient journey.

# Data-driven forecasting

# Conclusion

Choosing a call management system shouldn't be a quick decision. Evaluate all your options; make sure the company you are going to choose can support your business goals and provide the level of support that you want.

We hope that this guide has answered your questions about call management and how call tracking analytics can help your marketing and operations teams improve to achieve greater ROI.

Offline marketing attribution (and combining it with your online marketing) isn't talked about quite as much in this digital age. It is, however, where industries are going. Call tracking has evolved since its start over 25 years ago, and understanding how it works and what it can do for your business is vital before determining if it is a product that your business can benefit from.

If you have further questions regarding call management or just are interested in learning more, visit www.callsource.com for more insights and solutions.

**We are the experts in call tracking, call management, performance management, review management and digital management. Contact us today to learn how we can help with your call management needs.**

1. http://www.leadscon.com/speech-analytics-meets-manual-human-review/
2. https://adwords.googleblog.com/2013/09/new-research-shows-that-70-of-mobile.html