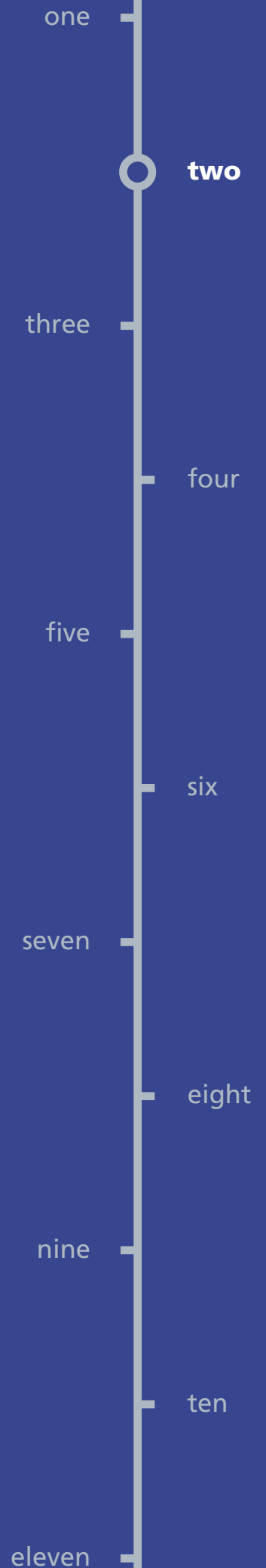




The Customer Journey

Touchpoint **two**: Making the appointment



Touchpoint **two**: Making the appointment

A Receptionist or Optical Assistant is usually in control of the appointment book and should aim to fill it as efficiently as possible. Whilst, for the majority of practices the eye examination is a loss leader, it often leads to the sale of spectacles or contact lenses. Therefore, it is important to schedule appointments to ensure that every patient has adequate time to discuss spectacle and contact lens options during their visit to the practice. Of course, if the person booking the appointment is a new patient they will require additional information and reassurance during the call, to help put them at ease. Also, from a business perspective, it is important that the consulting room and Optometrist's time are used in a cost-effective and efficient manner.

Answering the telephone

When talking to someone on the telephone, all a caller can hear is your voice. Therefore, all other senses, sight, touch, smell and taste become secondary to hearing. The caller is building a picture, in their mind, of both you and your practice, by what you say and how you say it. If he or she is a prospective new client, making an enquiry, it is likely to be the first time they have spoken to someone from the practice. Think how important first impressions are. If you want this person to become a valued long-term patient you will need to provide a good first impression.

The development of effective telephone techniques is one of the most important customer care skills. So, consider the following points:

Why is the telephone so powerful and important?

- It is immediate. The bell or buzzer demands an instant response
- It is direct. One person communicates directly with another in 'real time'
- It is personal, not a letter, facsimile or message that could be dealt with later
- We all rely on the telephone, in every occupation and in our personal lives

Reasons for losing important enquiries

- The call is considered an interruption
- The call is ended as soon as possible
- There is a failure to project a positive business image
- There is a poor exchange of the correct information

The Golden rules

To ensure that fewer opportunities are lost, it is important to use the telephone correctly. By following these guidelines, more enquiries will turn into appointments. The telephone should be considered an important business tool and not an interruption to an otherwise busy day.

The Golden rules

- Four-ring Rule
- Positive response – Smile!
- Use open questions
- Establish objectives
- Gain appointment/commitment

Four ring rule

Research has shown that after the phone has rung four times, for every additional time it rings, the perceived time elapsed for the caller doubles. Think of the last time you were making a call (perhaps trying to place an order with a supplier) when the 'phone kept ringing. Try to recall how frustrated and annoyed you were and the opinion you have of that company, now.

A telephone ringing constantly, will not only frustrate the person calling, but also other customers in the practice may feel uncomfortable about it, too. A ringing 'phone may even distract your colleagues, creating unnecessary extra pressure.

Whilst it may be difficult to answer every call quickly, especially when working alone and already busy with customers, a ringing telephone will cause those in conversation to lose concentration.

This situation can be handled in a positive way, by asking the customer you are with...

What to say

'Do you mind if I answer the telephone, to take a message and call them back later?'

Using a phrase like this shows the customer that you respect their time. Equally, they would want you to answer the 'phone if they were the caller!

Of course it is important to answer all calls, promptly. However, if you are sat by the 'phone when it rings, do not be tempted to answer it immediately. Do allow it to ring once or twice before picking up the receiver. This allows callers to compose themselves and structure their opening question.

Positive response – Smile!

A smile is the only example of body language that is effective over the telephone. Smiling when answering the telephone helps to convey a positive and friendly image. This does not mean grinning like a Cheshire cat! However, the bright and pleasant tone of voice created by a smile will ensure any caller feels they are dealing with an efficient and friendly person.

Many practices have a standard telephone answering procedure such as:

What to say

'Good morning, [Name of practice] Opticians. How may I help you?'

This way of answering the telephone demonstrates:

- Friendliness
- Confirms the correct number has been dialled
- A willingness to help

Use of 'Open' (and 'Closed') questions

In the example above, after the initial greeting, the first question is *'How can I help you?'* This lets the caller know you are interested in them and their enquiry. This question is an 'open' question because it cannot be answered with a simple 'yes', 'no', or one-word answer. Open questions are important, and should be used in some way during every Touchpoint in the Customer Journey. They are useful to find out more about an individual and their situation. It avoids an assumption being made, which is never recommended, as there is always the risk of being wrong.

Open questions can begin with any one of these seven words, only:

- What...?
- When...?
- Where...?
- Which...?
- Who...?
- Why...?
- How...?

If you are inexperienced and lack confidence when handling enquiries, open questions help to take the pressure off you, whilst the caller is thinking about and providing their answer. In addition to this, the caller will feel that they are fully involved in the conversation and not just being 'processed'.

Exercise

Write down three open questions that you could use to find out more about the caller and their enquiry, when handling an incoming telephone call.

1.
2.
3.

Remember, if your question does not begin with one of the seven words listed above, it is not an open question.

All other questions are 'closed' questions. Closed questions are those that can be answered with 'yes', 'no', or another single word. There is nothing wrong with this type of question. In fact, closed questions are very useful for confirming or leading towards the making of a decision. For example, *'Do you want your eye examination at 10.00am or 10.30am?'* The problem with closed questions, especially when they are used too early in a conversation, is that they are likely to make the client feel as though they are being processed and not treated as an individual. Whereas the aim should be to make every caller feel they are an individual, as well as being special.

Establishing an appointment time

The majority of telephone calls to the practice will be because people want to book an appointment with the Optometrist. When an appointment is being made there is a great deal of information to be gleaned from the caller, as well as identifying a mutually convenient time for the appointment itself. During this process it is difficult to avoid asking some closed questions. However, the aim should be to keep the number to a minimum.

Unless the caller has said that they have received a reminder letter from the practice, you should establish whether they are a new or existing patient. Asking *'Have you been to us before?'* easily does this. If the answer is 'yes', now is a good time to access their record card from the filing system or computer system. Then you can confirm the last time they visited the practice and whether they wear spectacles and/or contact lenses or were eligible for any support for the eye examination or spectacles. At this point you should confirm whether there has been any change in their circumstances since their last visit to the practice.

For a new patient, you may wish to ask how they heard about the practice. This information is helpful for deciding how effective practice marketing and advertising campaigns have been in generating new patients. Although for many practices most new patients are generated by the recommendation of existing ones. If the caller has just asked if they can make an appointment it is necessary to confirm what the appointment is for. For example, *'What type of appointment would you like?'*, which could be followed by *'Is it for an eye examination, contact lenses or something else?'*. Of course, if you have an existing patient's record in front of you, this will be more straightforward. However, for new patients more probing is required. New patients will not always know whether they are eligible for an eye examination funded by the NHS, so you may have to list the qualifying categories.

The next step is to establish the best time for the appointment. If you ask *'When would you like to come in?'* (An open question) it is possible they will choose an inconvenient time, either when you are booked already or perhaps have no clinic. This leads to you having to give a negative

answer and perhaps disappoint them or even worse, lose them to another practice. Alternatively, you may inadvertently encourage the caller to tell you their diary movements for the next week or more and still be no closer to deciding when they wish to make an appointment. However, if you use a variation of an open question to help guide the conversation, it will help the caller to make a decision.

For example:

What to say

'I have appointments available on Tuesday or Wednesday, which is better for you?'

Most callers will choose one or the other, or ask for a specific day that is better for them. When they have selected a day, you should offer a choice of appointments, one in the morning and another in the afternoon.

For example:

What to say

'We have appointments available at 10.30am and 3.00pm, which one is best for you?'

The caller will feel they have made their own decision, even though you skilfully guided them to book an appointment that is mutually convenient for them and the practice. Using this method will help you to fill the appointment book efficiently, avoiding too many unscheduled gaps that may reduce the efficiency and profitability of the practice.

What not to say

'We can squeeze you in on ... at ...'

Of course, there will always be some who can visit on specific days at certain times only, but these are generally the minority and they will tell you anyway. However, if someone insists on booking an appointment on a day that the practice does not have an Optometrists in attendance. It sounds better if you say *'I am sorry we do not have any appointments*

available on that day' and then to offer alternative days when appointments are available. This will sound much better than saying there is no Optometrist in the practice on that day.

Confirming the appointment

Now is a good time to offer to post a card or letter to confirm the appointment they have made. However, if even after sending a written confirmation the patient does not arrive for their appointment, it is not only inconvenient, but also costly to the practice. To reduce the incidence of these 'no shows', more practices are telephoning patients to confirm their appointments. This can be done the evening before or on the morning of the appointment.

For this to be successful, it is best to tell the patient when they are booking the appointment, that you will be telephoning them to confirm their appointment. At this time you can confirm that you have the correct telephone number on which to contact them. If they know that you will be 'phoning them, they are unlikely to be annoyed by the call. Of course, if they are unable to make the appointment you may be able to fit someone else in, at short notice.

You could word your call as follows:

What to say

'Hello, this is [Practice name]. Is that Mr Smith? I am 'phoning, as promised, to confirm your appointment at [appointment time] with [Optometrist's name], our Optometrist. We look forward to seeing you.'

Some practices implement this initiative for family group bookings, initially. However, when the benefits to the practice have been established, it is often introduced for all appointments.

When an appointment has been agreed and all relevant information obtained, they should be informed what to bring with them for the appointment. This may include any spectacles they are using and contact lenses, of course. This will be especially important for new patients or existing patients who may have acquired spectacles elsewhere since their last eye examination.

New patients

For a new patient making an appointment it is good to confirm that they know where the practice is and how to get there. If there is convenient parking nearby, inform them of this too.

Finally...

Complete the call by thanking them for making the appointment and confirm the details.

For example:

What to say

'Thank you for booking an appointment for an eye examination with [Optometrist's name] on [date] at [time]. If you have any questions please ask for me [OA's name] or one of my colleagues. We look forward to seeing you.'

Additional use of the telephone

Price enquiries

When handled badly, it can be easy to lose prospective new business. This is not necessarily due to your prices being greater than those of other practices, but because the caller was not given the confidence that your practice provides good value. The majority of shoppers will consider many factors before making a buying decision, just as we do; price is just one of them. Optics is very competitive and it is likely that another practice will be offering similar goods and services, for less. Or, those that appear to be cheaper when they are not! This means there are even more reasons to offer friendly and effective levels of customer service and care, in addition to products and services that provide value for money.

Do consider what your objectives are when answering enquiries. First of all, your aim should be to answer the caller's questions and then to offer an appointment. Alternatively, encourage them to visit the practice for more information. If the caller is not keen to do either you could offer to send some information to them, by post.

If a customer asks *'How much is your sight test?'* and the answer provided is *'£19.50'*, or whatever your sight test fee is, it is unlikely that an

appointment will be made. That is, unless your practice has the cheapest eye examination fee in town. However, this approach will encourage the caller to consider your practice's eye examination on price, alone.

When more information is provided, to support the enquiry, the caller is more likely to consider making an appointment, using other factors as well as the cost. The following examples have been provided to illustrate the importance of developing a rapport with the enquirer. Remember, your aim should be to 'add value' to the products and services offered by your practice, for every enquiry. This will help to avoid decisions being made on pricing considerations, alone.

Example 1

Caller's question: *'How much is your sight test?'*

Your response:

What to say

'The cost of our comprehensive eye examination is £24.00*, unless you are entitled to one funded by the NHS. During the appointment the Optometrist will conduct tests to determine any requirement for vision correction, as well as looking at the back of your eyes to confirm the condition of your general health. It will take around thirty* minutes. If necessary, further tests may be advised for glaucoma and other vision-related disorders.'

'Would you like to book an appointment?'

If the answer is 'Yes', you can offer the next available appointment.

* Obviously you will need to substitute the figures relating to your practice's fees and appointment times. Before using this response, clarify with the practice team that they are completely happy with the content.

If the caller has not had an eye examination before and/or they ask how long the eye examination will take, do let them know it will be about 30 minutes (or however long appointments are usually made for in your practice). However, they will need to be told to allow time to choose new

spectacles, if they require them. So, let them know that they should allow about an hour, in total for their visit to the practice.

This approach has been proven to be far more effective than just quoting the cost, because it adds value to the eye examination process. It also helps to avoid the misunderstanding that the eye examination is 'Just a sight test'.

Example 2

Caller's question: *'How much are contact lenses?'*

This is often considered to be one of the toughest questions to answer, especially over the telephone. In many practices, the telephone will be passed from one person to another, until someone is brave enough to take the call. Usually it is due to a lack of confidence or knowledge regarding contact lenses. However, as you will see very little contact lens knowledge is required to answer this type of enquiry, successfully.

Your response:

What to say

'What type of contact lenses do you want?'

By asking this open question, you will soon find out how much the enquirer knows about contact lenses or if they have worn them before. If they have no experience or knowledge of contact lenses, you can always follow this with another question...

What to say

'When (or 'How often...') do you want to wear contact lenses?'

You will quickly develop a rapport with the caller and have a better understanding of their motivation for wanting to wear contact lenses. At this time you should have some idea of the contact lens options that may be appropriate for this person i.e. Daily disposable lenses for occasional use, two or three times each week, perhaps.

At this time you will be able to quote a price for lenses.

What to say

'It sounds as though the occasional use of daily disposable lenses may be suitable for you. These will cost £17.00* per month, which includes twelve pairs of lenses and all aftercare appointments, to check your progress with the lenses. In addition to this, there is an initial fitting fee of £25.00*. This is a consultation with the Optometrist when you can try different lenses to establish the best type for you, depending on the shape of your eyes, your prescription and how often you intend to wear them. It will also include being shown how to handle and care for your lenses.'

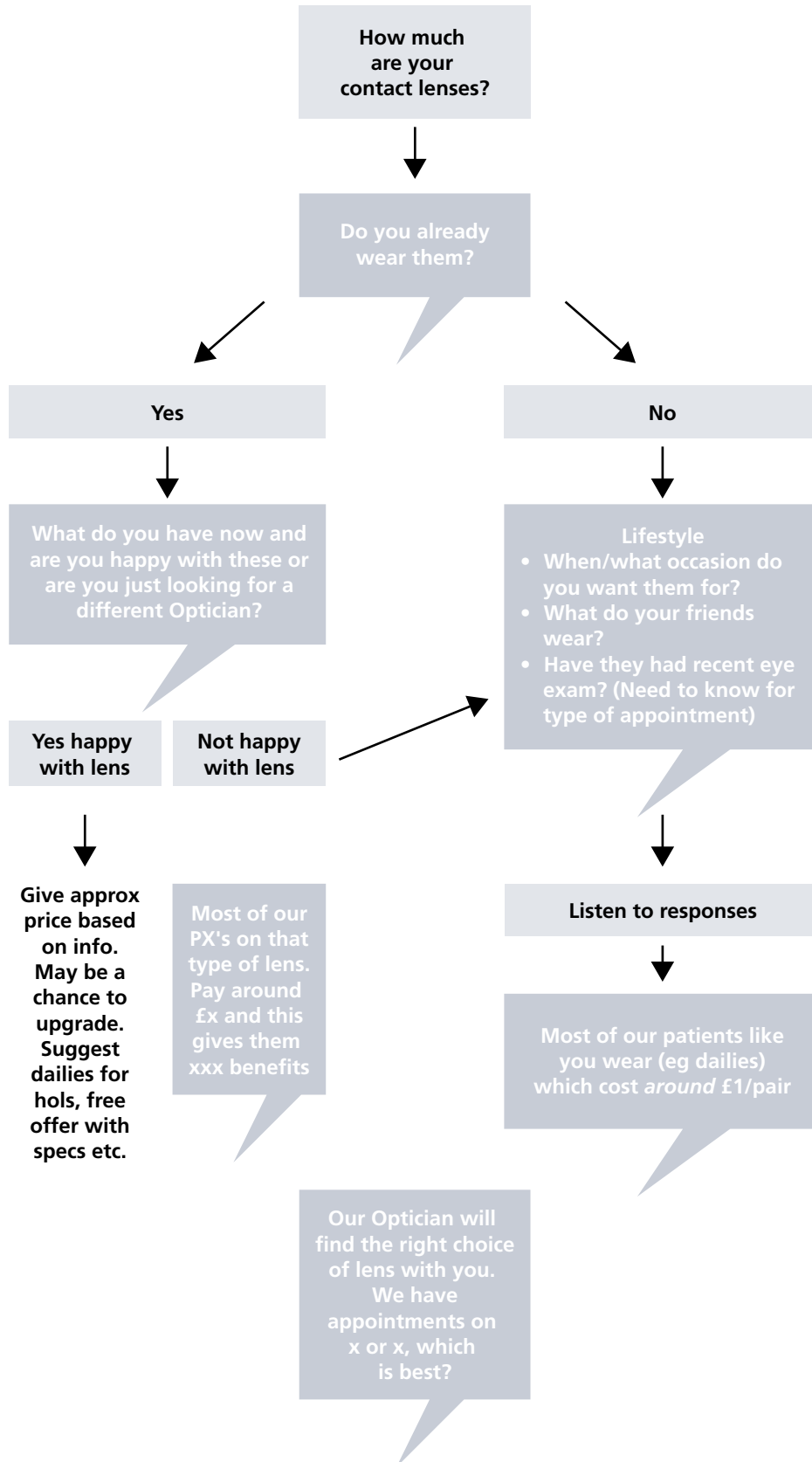
'Would you like me to book an appointment for you?'

In this example a price has been quoted and then supported, to explain what it includes. This will provide the caller with the confidence that, whilst you may not be the cheapest, your practice is thorough and offers good value. Overall, this will appeal to more people than just saying *'From £9.95 per month.'*

* You will need to insert prices to represent those charged by your practice.

If the caller is unwilling to book an appointment, at the moment, you can offer to send them some relevant information, by post. Alternatively, why not invite them to visit the practice if they have any questions, before booking their appointment.

An alternative method for answering...



Summary

The answering of price enquiries is quite straightforward when a structured approach is used.

For example;

- Establish objectives
- Provide information
- Gain appointment/commitment

Establish objectives

With the use of open questions, the caller will soon realise that you are interested in helping them find out what they want or need to know.

Compelling fact

The majority do not make buying decisions based on price alone

Remember...

- Support, but do not defend prices
- Give them something to think about, apart from the price

Provide information

Answer the question and quote prices that are supported with additional information. You may need to ensure you have an understanding of the pricing structure used in your practice. If you keep a binder with all the important information you may require, including price-lists, you will not feel under pressure to remember everything. In addition, you will not need to keep asking someone else for answers every time an enquiry is made.

Gain an appointment/commitment

The main aim with telephone enquiries is to encourage the caller to visit the practice. Always encourage them to visit the practice with a friendly invitation, e.g.

If they seem reluctant or unable to visit soon, offer to post details of the services and products you have discussed.

What to say

'Why not drop in and see what we have to offer?'

'Our Optician would be pleased to discuss the options with you.'

This approach will help convert more enquiries into new patient appointments.

Customer Journey materials

'Making the most of your visit' leaflet (ZCJMOSTLEAF1)

Using the telephone pro-actively

Used wisely the telephone can be a useful tool for helping practices manage time and costs more efficiently. As a short local 'phone call will cost less than a second-class postage stamp, do consider using the telephone, before sending a letter or postcard.

Examples may include:

- **Reminders** – As many as 30% of patients say they would prefer to receive a telephone call, instead of a letter or card, to remind them that it is now time for them to book an appointment for an eye examination. Apart from the savings in costs to the practice, this can increase the response rates of the reminder system, because many will book an appointment at the same time. Initially, it is likely to be of most benefit to patients who require frequent appointments i.e. Children, diabetics or glaucoma sufferers. However, as it is unlikely that all patients will want to be reminded in this way, it is advisable to ask patients for their permission before replacing their letter with a 'phone call.
- **'Your spectacles are ready!'** – The majority of practices do telephone to inform customers that their spectacles are ready for collection. However, if a customer has ordered an attractive frame with high technology lenses and they look good. Why not tell them how good they look? This is likely to encourage them to visit sooner to collect their new spectacles. You should be able to suggest a good time for them to visit, to ensure a Dispenser will be available to fit them.

What to say

'Hello Mrs Smith this is your Optician. I am 'phoning to let you know your new spectacles are ready for collection. If you would like to come in on ...day at ...(time) or (alternative day/time) our Dispenser will be able to fit them for you. They look really good I think you'll be pleased with them.'

- **'Your spectacles are not ready, yet'** – It is usually better to inform someone that their spectacles are taking a little longer than they were first advised. This will save having to be defensive and apologetic to someone when they come in to collect their new spectacles, only to find that they are not ready yet.

Action Plan

Discuss and agree ways in which the telephone can be used more effectively, especially when booking appointments and handling enquiries.

1.
2.
3.
4.