

# THE TRUTH ABOUT CALL TRACKING

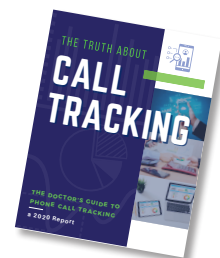


THE DOCTOR'S GUIDE TO  
PHONE CALL TRACKING

a 2020 Report



# THE TRUTH ABOUT CALL TRACKING



## The Doctor's Guide to Call Tracking

Years ago, few practices tracked or recorded their phone calls; the technology didn't exist, nor was the value recognized. Today the majority of offices do some level of call tracking. That's a huge step in the right direction, as there's nothing more impactful than data. **HOWEVER, data without insight to make the necessary adjustments to improve, is useless.**

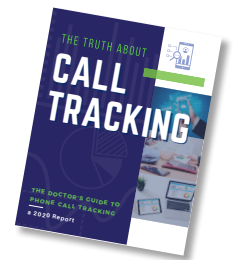
Moreover, **it costs money to get that data**, which most do through a marketing vendor, and others by paying extra for that feature in their phone system software. You need to ask yourself, are you just **SPENDING** money to get that data? Or, are you **INVESTING** with the expectation of getting a positive return on that investment in the form of **INCREASED NEW PATIENTS, REVENUE and NET INCOME?**

Chances are, you **THINK** you're doing the latter by outsourcing the marketing function to a company that claims they will generate new patients for you by tracking and reporting your call data. You are led to believe **THEY** will do what needs to be done to generate desired results. Clearly that's not the case, considering the large percentage of doctors who continue to cite marketing and **NEW PATIENT GROWTH** as the single most challenging area for their practice.



This report will help you understand what **YOU** should be doing to generate new patients, instead of being misled by marketing companies.

# THE TRUTH ABOUT CALL TRACKING



## The Purpose of Tracking Call Data

Every business, large and small, in every industry, should be accurately tracking data around what they have identified to be meaningful and informative Key Performance Indicators (KPIs). These are the MOST important metrics, that when consistently achieved, indicate a thriving, profitable and growing business. They also mean the business is well-prepared to weather economic storms and other industry challenges that inevitably occur from time to time.

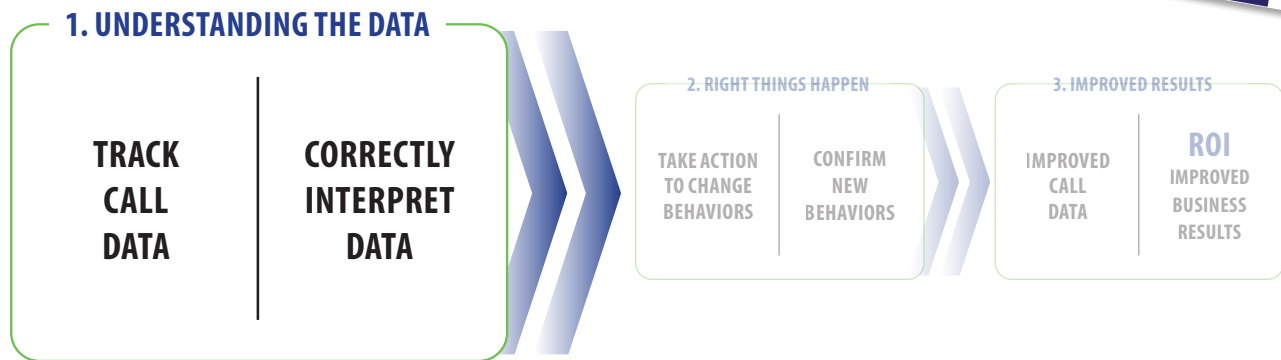
In your case, they would include NEW PATIENTS, REVENUE and NET INCOME. These KPIs tell you how well your business is performing compared to your strategic goals and objectives, and help you make fact-based decisions about how to improve and grow the business. (How you FEEL about marketing doesn't matter, only the FACTS matter.)

Call data is an important metric to monitor, but tracking data just for the sake of having data is pointless. The PURPOSE of tracking call data is so you can TAKE ACTION IN RESPONSE TO IT in order to improve your KPIs – the metrics that matter most.

This graphic provides an overview of the key points that will be explained in this report.



# THE TRUTH ABOUT CALL TRACKING



## 1. Understanding the Data

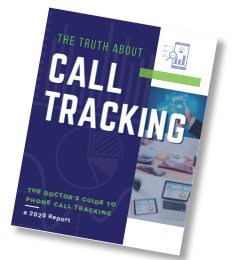
Before you decide on actions, first you need to understand what the data is telling you. As with any metric, if you have no idea why results change, you won't know what worked and what didn't from one reporting period to the next. You'll be guessing, which can lead to erroneous conclusions and misdiagnosis of root causes vs. symptoms. This can point you in the wrong direction, or cause you to make bad decisions, which is worse than not having the data at all.

**EXAMPLE:** Suppose your most recent call tracking report showed a decrease in the number of missed calls. Before you accept the data as a positive result, ask yourself what happened or what did you or the team do differently to cause that result? Is it possible they sacrificed the patient experience of those in the office in order to answer more phone calls? That's not a positive result, despite what the call data would lead you to believe. Or, did you TRAIN them to PERFORM DIFFERENTLY, with an understanding of WHY it was important to answer the phones, and the EXPECTED OUTCOME of answering more calls – which is more new patients IN ADDITION to delivering a positive patient experience?



**Interpreting data correctly is essential to making good decisions in response to it.**

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## 2. Right Things Happen

No matter how accurately collected and interpreted, just **HAVING** your call tracking data won't cause anything to change. In other words, the right things have to happen; you must take action in response to the data, e.g., put new processes in place, and **TRAIN PEOPLE TO CHANGE THEIR BEHAVIORS**, which in turn leads to different results. **Tracking is not training, and only training will change how people perform so as to positively impact key business results.**

**EXAMPLE:** Suppose your most recent call tracking report showed an improvement, but there was no **CORRESPONDING INCREASE IN NEW PATIENTS**. That's not a positive result; the right thing hasn't yet happened. The team isn't capable of converting calls into new patient appointments because they haven't been **TRAINED** to handle calls in a way that generates bookings.



Unfortunately, too many businesses skip the middle box – “Right things happen.” Marketing companies claim that giving you your call data equates to “fixing” your new patient problem. Don't be misled, and **don't confuse tracking with training**. Unless people are **EFFECTIVELY TRAINED TO CHANGE THEIR BEHAVIORS**, the results you're tracking won't change either.

# THE TRUTH ABOUT CALL TRACKING



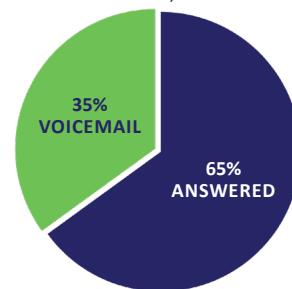
## 2. Right Things Happen (cont'd)

Specifically, these are the right things that need to happen in response to your call data:

### a. Reduce the number of missed calls to no more than 1%.

A study involving more than 27,000 “mystery shopper” -type calls to practices of all sizes throughout the U.S. concluded that a stunning 35% went to voicemail, even though the calls were made during normal office hours. Combined with TEAM TRAINING, taking steps to answer more of your calls requires only small investments that will more than pay for themselves in patient appointments, and therefore increased revenue that is almost immediate.

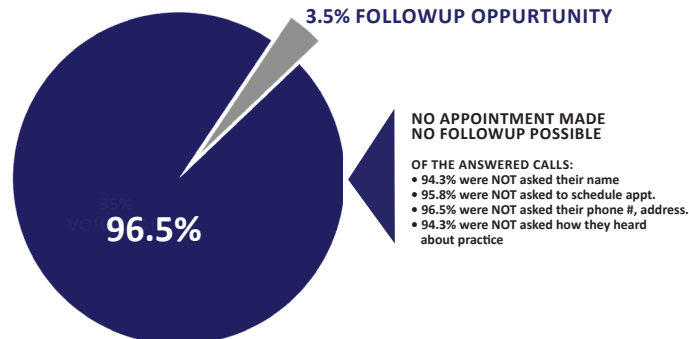
**% OF CALLS TO VOICEMAIL**  
Based on 27,354 calls



Dental Research Center, 2016

### b. Train your team to answer ALL calls more EFFECTIVELY. Answering the phone gives people the OPPORTUNITY to increase new patients and revenue by handling the call to the patient's satisfaction, AND in a way that is also beneficial for the business. Potential new patients call with the expectation of making an appointment, and yet studies show often that doesn't happen. Why? Because team members are not TRAINED to convert calls from potential new patients into booked APPOINTMENTS in an efficient and friendly way.

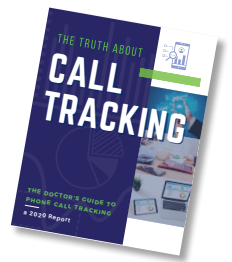
**OF THE 65% ANSWERED CALLS IN THE CHART ABOVE**  
Based on 17,780 answered calls



Dental Research Center, 2016

As you can see from the second chart, they also are not trained to capture essential information from the caller that would allow you to do follow-up “recovery,” further wasting the marketing dollars spent to generate a phone call that ultimately has no impact on the business.

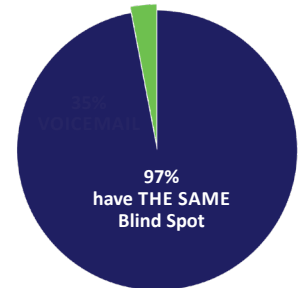
# THE TRUTH ABOUT CALL TRACKING



## 2. Right Things Happen (cont'd)

- c. **Unblock your Blind Spot.** This enlightening data comes not from a call tracking report, but from what is known as a “BLIND SPOT ANALYSIS” – so named because doctors are blind to the fact that it’s occurring. In another study involving nearly 13,000 private practices, 12,239 of them (or 97%) were shown to have this blind spot. This isn’t surprising, considering the very nature of a blind spot is that you simply cannot see. Worse, you have no idea how much revenue you are losing because your team isn’t trained to CAPTURE new patients, even when your marketing campaigns successfully drive potential new patients to call your practice. Having already taken advantage of this complimentary “The Truth About Call Tracking” report, you will automatically have the additional advantage of learning, also at no charge, just how big YOUR blind spot is and what it’s costing you, as explained at the end of this report.

% OF PRACTICES WITH A BLIND SPOT  
of 12,617 private practices studied



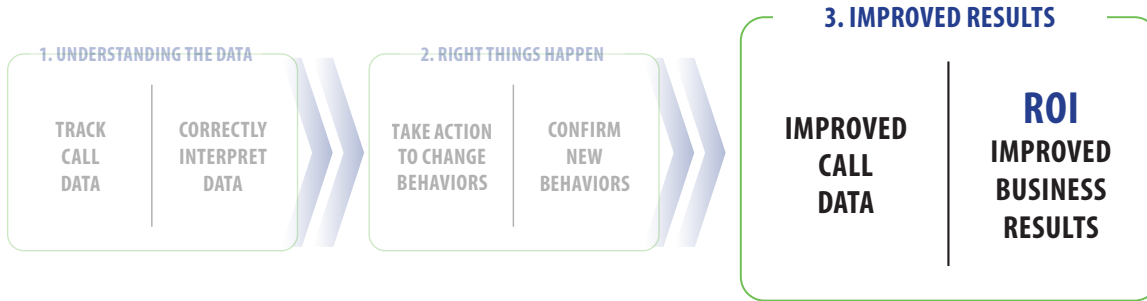
Dental Research Center, 2019

Both new and existing patients have the majority of their interactions with your practice over the phone. In fact, more people CALL your office each day, on average, than physically come in. So never underestimate the role your phones play in the patient experience, and in the growth of your business.

- d. **Confirm new processes and behaviors** by building in accountability systems that enable you to monitor and confirm that what is SUPPOSED to be changing is happening as intended. If you rely entirely on future reports for that answer rather than accountability of the changes, you run the risk of misinterpreting what the data is telling you. That is, if the data has not improved, you will be led to believe the changes you made didn’t work, when in fact they just “didn’t take” and retraining is necessary. What we have found is that **training without accountability is just entertainment.** And for an area that is on the “other side of the wall” from where you spend your time day in and day out – you need built in accountability to ensure this is happening.

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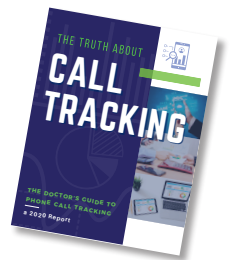
### 3. Improved Results

Improved results are, of course, your end goal. But you need to know what processes and behaviors changed that led to a change in results. If you don't know why results changed, then you won't know what worked that you should continue doing, and what didn't work that needs to be tweaked or aborted. More importantly, if your call data improves WITHOUT a corresponding improvement in business-building metrics, you're not accomplishing anything meaningful. Intentionality is key here. Make changes with intention to really improve the results, not just make changes for the sake of making them.

When these things happen as they should, the cost of call tracking becomes a smart investment because you'll reap a SIGNIFICANT return at a strategic level. Your call data will improve, but, more importantly, you'll see the desired increase in your bottom line in the form of increased revenue and net income that comes with more new patients.



# THE TRUTH ABOUT CALL TRACKING



## Recap

Together with this more detailed graphic on how to achieve MAXIMUM ROI by tracking call data, the key points of this report are summarized as follows:

1. Call data is important to track and understand; misinterpretation of data leads to bad decisions
  - Tracking is not training; tracking does not lead to behavior change
  - Only proper TRAINING leads to new behaviors that positively change key business results
2. You must take the RIGHT actions in response to the data
  - Take actions to answer MORE calls, a missed call is a missed opportunity
  - Train the team to answer ALL calls more EFFECTIVELY so they result in booked appointments
  - Discover and remove your Blind Spot; understand what it's costing you in lost revenue (see page 11)
  - Confirm new processes are in place and working, and that training has successfully modified behaviors as intended; if not, retrain and reinforce
3. Improved results must reflect a positive ROI
  - Improved call data WITHOUT a corresponding increase in new patients, revenue and net income serves no purpose
4. Continuous Improvement should be ongoing
  - If key business results did NOT improve, you may have misinterpreted the data, which led to ineffective actions; and/or the CORRECT actions/processes/training you put into place did not “take” and need to be reinforced with added accountability
  - If key business results DID improve, fuel ONGOING growth by continuing what worked AND looking for ways to continuously improve

# THE TRUTH ABOUT CALL TRACKING



## Conclusion

Marketing – specifically, NEW PATIENT GROWTH – and TEAM TRAINING are reported as the sorest pain points for independent practice owners. One seemingly easy solution is to unburden yourself by outsourcing the marketing function to a company that claims they will generate new patients and growth for you by tracking and reporting your call data.

Hopefully this report has helped you understand that – regardless of what you are being told – just HAVING the data has NO impact on new patient and revenue growth. And if you DO have a marketing campaign that performs well and new patients increase without paying attention to what happens on those calls, you better believe that there could be significantly higher results by fixing the first interaction with your practice, the phone call. **It's an illusion to think that tracking is training, or that you will be able to answer more calls just because you know how many you're missing.** Marketing companies don't operate in that center box where “the right things happen” on the phone, which means they simply CAN'T deliver the results you want and need to grow your practice. Keep reminding yourself – TRACKING IS NOT TRAINING.

Instead, leverage outside training expertise to help you with those “right things.” A qualified, experienced training expert will partner with you and your team to make effective USE of the call data by layering training on top of it. They will help you implement processes that ensure more calls are answered. More importantly, they will help you SEIZE THE OPPORTUNITY to increase new patients and revenue through TEAM TRAINING that changes behaviors so ALL calls are answered more EFFECTIVELY, resulting in more appointments.

In addition, the RIGHT training company will help you maximize the value of your single biggest asset – your Human Capital. When you have a high-performing team that's engaged, motivated, accountable, committed and capable of delivering an excellent patient experience, improved call data will be a minor win compared to the major ROI you will be celebrating each month in metrics that matter – especially NEW PATIENT GROWTH.

## Take the Next Step: Build on Call Data for MAXIMUM ROI and REVENUE GROWTH

In addition to this free report that has revealed the truth about call tracking, you will ALSO receive a COMPLIMENTARY, CUSTOMIZED analysis of what call data DOESN'T tell you, which is the size of the blind spot in YOUR specific practice, and the impact it's having on YOUR business:

- **Wasted marketing dollars:** You invest in marketing campaigns with the expectation they will generate new business. When you don't get the ROI you were hoping for, you conclude the campaign was ineffective. But what if the campaign actually generated a lot of calls? Why didn't you see the additional revenue that SHOULD have come with those additional calls? Because of the blind spot that exists in 97% of all practices.
- **Difficult recovery from economic/industry challenges:** This blind spot isn't a new phenomenon born of the pandemic. It has always been there and always will be. That said, unblocking it will significantly impact how quickly and successfully your business recovers in the months and years ahead, AND how well prepared you are for future challenges.
- **Barrier to growth:** Actually, your blind spot is more than a barrier – you simply CAN'T grow your business until you unblock your blind spot so you can take steps to avoid the danger that comes with it, AND recoup the money you're losing because of it.

This blind spot is not your fault. After all, you don't know what you can't see. But what if there was a way to see inside your blind spot? Wouldn't you want to know how to easily, predictably and inexpensively unblock that blind spot so you could increase collections by \$10,000 - \$50,000 (every month!) with NO increase in marketing or advertising... guaranteed?

There is a way, and you deserve to know what it is. Because you've taken advantage of this report, you will soon have the additional advantage of a PERSONALIZED BLIND SPOT ANALYSIS REPORT – customized to YOUR practice – and sent to you ABSOLUTELY FREE. This analysis will REVEAL YOUR BLIND SPOT... determine what it's costing you... and get you on track to GROW YOUR BUSINESS through DRAMATICALLY INCREASED MONTHLY COLLECTIONS currently trapped in your blind spot.

➤ Look for your **FREE** customized analysis to arrive via FedEx in less than two weeks!



**You are on your way to receiving a customized Blind Spot Analysis of your Practice just like these doctors did:**

**“THE ANSWER TO MY PRAYERS.”**

**– DR. JACK V.**

**“REJUVENATING! MOTIVATIONAL!  
EDUCATIONAL!”**

**– DR. JEFFREY B.**

**“CAPTIVATING! GAVE ME THE STEPS I NEED.”**

**– DR. MICHAEL C.**

**“EXCEEDED MY EXPECTATIONS!”**

**– DR. CHUCK R.**

**“I WAS SKEPTICAL... HOWEVER... IT IS  
REMARKABLE HOW WELL IT WORKS!”**

**– BRANDY, TEAM MEMBER FROM DR. WALTER H.'S OFFICE**

**“IT IS SO EXCITING!”**

**– DR. SUSAN H.**

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**When it arrives, don't delay! You'll need to find 15 minutes to review its contents. You'll learn about the Blind Spot that Exists in YOUR Practice and what you can do to fix it so that you can make sure the money you're investing in tracking your calls and in marketing aren't going to waste.**