

# Call Criteria & Definitions Example

## WHAT

- We greet our caller with a friendly and upbeat tone of voice
- We greet our caller with a tone that displays confidence

## WHY

- To provide a first impression representative of our brand through our tone of voice

## Did I listen?

### WHAT

- We do not interrupt
- We use verbal nods to acknowledge our caller
- We don't talk over our caller
- We use restatement as a technique to demonstrate we are listening
- We listen to our caller instead of just hearing them

### WHY

- To demonstrate that our caller has our undivided attention
- To reduce the need for our caller to repeat themselves
- To check and clarify that we have understood our caller correctly

## Did I use the correct greeting?

### WHAT

- We greet our caller with a clear introduction to [insert practice name]
- We proactively provide and offer assistance

### WHY

- To ensure that our caller is given a consistent greeting, irrelevant of the individual they have connected to
- To ensure our greeting is professional and representative of our brand

## Did I provide my name?

### WHAT

- We proactively provide our name to our caller in a clear manner

### WHY

- To start to build rapport by introducing who we are
- To start to personalise the interaction
- To display ownership by volunteering our name proactively

## Did I sound warm, friendly and upbeat?

## WHY

- To help us determine the ROI on our marketing efforts
- To help us determine what people are searching for
- To help us determine what content appeals to people
- To help us to improve our content
- To help us to understand what the community is saying about us in the case of WOM

## Did I ask what the caller's concerns were? Why are they seeking treatment?

### WHAT

- We recognise the importance of our caller feeling heard
- We can acknowledge these concerns and make them relevant as we are explaining the orthodontic consultation process
- We note this information to later share with the TC

### WHY

- To build rapport and cater to their needs as well as appoint appropriately
- To recognise the caller upon first visit to the practice, treating them as an individual, providing a personalised level of service with an understanding of their needs
- To ensure the TCs are appropriately prepared and to strengthen the rapport by demonstrating that they already have an understanding of the caller's needs

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## Did I ask how they heard about us or found us?

### WHAT

- We ask how the caller came to learn about us
- We ask them what prompted their search. What information were they looking for
- We ask them to elaborate and share what appealed to them
- We ask if they found anything lacking in the information to note for the consultation