FREE REPORT

Successful tips for building a successful front desk team

Front Office GURU

Tips for the busy private practice owner

Hello and Congratulations on taking the next step toward practice success!

When I began helping Mike run our practice, I was fresh out of patient care, new to management, and didn't know how to get others to get things done. Our arrival rate was 75%, new patient evaluations were on a roller coaster from week to week, and we had Eeyore working at our front desk. *(If you've read Winnie the Pooh you know what I mean...)*

I did everything I could to train her (Eeyore) to be more effective and successful in her position. I gave her scripts, instruction on handling objections, and worked side-by-side with her so she could learn to discuss the topic of money without asking *"Would like to pay today?"*

I 'thought' we needed more help; so I hired a part-time employee who *promised 'great' things*. His previous supervisor talked about his organizational skills and willingness to learn and how he'd restructured their offices. Win-win, right? WRONG! I quickly learned that his employer was probably willing to say anything to be rid of him.

So now I had Eeyore, who wasn't willing or able to learn something new, AND a part-time employee who, about 2 months into his position, had the audacity to tell me that he didn't like checklists because they made him less efficient. And when given clear instruction on the why and how to use it, he still ignored my request.

Yeah, that pretty much blew my mind.

I quickly realized we didn't have a hiring system in place which was why I struggled to recruit, hire, train, and put a front office team on post.

In fact, our hiring system at that time looked like this: post an ad, look at the resumes that came in, choose someone with some experience, do a phone interview, bring them in to meet them and if they presented well and could demonstrate some front desk experience, we hired them.

That didn't work because they brought bad habits and lack of true skills to our practice, and it was creating a stop to patient care. So, I decided to change our operating basis when it came to recruiting and hiring.

In this free report, I'll share what I did to build a successful front desk team that manages our patients from the initial call through full recovery.

Wishing you the best, today and always,

Dee

The Key Strategies that I use when recruiting and hiring

(The first key strategy is senior to ALL the others.)

1. *Hire slowly, train effectively, and terminate swiftly* if they don't meet your expectations. This is the one statement that has been my salvation as a manager and owner. And I use it to guide my team now that they're in charge. As practitioners, we're often kind-hearted and we don't want to hurt someone. But it's essential that we have a process to hire the right candidate for our practice, that we have a successful plan and system for training our front desk staff to properly manage our patients, and if they can't to be able to let them go so we don't do more harm to our patients or the failing employee. It ends up being good for all involved.

2. *NEVER stop recruiting.* Don't take this the wrong way but there are better candidates out there and we all run a service-based business. So, we want those who are the best at what they do, which is care for our patients. Also, you want to keep recruiting even if you think you don't need anyone; because all of a sudden someone gives two weeks' notice and that puts you in a bind.

3. *If your Spidey senses are tingling, listen to them.* Your instincts are pretty accurate so if something doesn't feel right, pay attention. It's essential that you hire qualified team members who are interested in learning and expanding their skills.

4. *Don't be afraid to poke the bear.* Don't be afraid to ask the difficult questions and make them work for the position. Workers are valuable so you want to find those willing to work. We challenge applicants throughout the process to ensure that they committed to working with us.

5. *Don't settle for anyone less than your ideal candidate.* If you're in the middle of an interview and it isn't working out, end it. Your time is valuable and so is theirs. Also, don't keep bringing them in if you only feel 'ok' about them. Even the phone interview can tell you how they'll really be. I always remind my clients "if they can't be ready to talk on time, they don't have good time management or planning skills. If they can't focus on you and only you while you're on a phone call with them, can you imagine what they'll be like on the phone with patients? And if they only ask about salary and benefits, they aren't interested in your company, just in having a job." None of those are ideal.

6. *Keep a running list of qualified applicants.* When you're hiring for a position, and you find multiple candidates you really like, it's ok to request that you keep names on file for future openings. That gives you a list to work from IF someone gives you short notice or just doesn't come back.

How to make your process work for you

Now, have you thought about what it would feel like if your front desk team knew how to handle the most common (and some of the most unusual) patient objections to getting care?

Or what about having a team that is 100% focused on helping patients get the care they need and deserve? Isn't that a great mission for everyone to have?

Now, consider, how would THAT affect your schedule control, same-day cancellations, collections, and overall patient management?

What would that do for your practice? Your patients? For you?

I know that when I committed to hiring qualified team members and training them up to be the best they could be in their positions, it made a HUGE difference in both patient care AND satisfaction. And it made my life a WHOLE lot better. I no longer spent my days putting out fires from upset patients and I was able to focus on growth and expansion of the practice.

But sometimes it can be difficult to weed out the ones who "might" fit but aren't the best fit. So below I've included some tips on how to quickly weed out those applicants who can't or won't be the best fit.

Have a process that they MUST follow.

Look, I get it. Sometimes we feel like we need to fill an empty position right away. But if you don't follow a process and weed out those who aren't a good fit for your practice, you get what you hired. And then end up being either unwilling or unable to do the job or to learn how to do it.

So having a set process for everyone to follow is a key to success. This also keeps you focused and on point as you move them through.

Use EMAIL as your first line of defense.

You don't have to weed through every single resume that comes across your desk.

When you receive a resume on Indeed or another job site, have a response email that you send regarding that position. This email should fully explain the position, so it weeds out those who have an automated application on job sites and who aren't interested.

[Note: On Indeed and other similar job sites, someone can put up a resume and select what jobs or job areas they're interested in within the platform. So anytime a new job is posted in that area, the site automatically sends the resume to you. It's not the applicant who saw your ad and applied; it's the site doing it for them. And sadly, they could have already found

a job and have never taken the resume down. So you may receive a lot of resumes when you post a front desk job but not everyone is still searching. It's so frustrating and creates a lot of wasted time if you review resumes first.]

I suggest you have a response email that you send to all applicants that describes the position and gives them a time and date to respond by. That will weed out the uninterested before you take the time to review a bunch of resumes.

The response email SHOULD challenge them.

The front desk is a multifunctional position that requires focus and the ability to manage your entire patient list on a daily basis and get things done correctly the first time.

So, we want to make sure that we only continue with applicants who quickly follow directions because they need to be able to quickly learn their position.

So the better an applicant is at following directions, the better they'll do when you start to train them.

Here's what you can do to challenge them:

- Give them instructions on 3 things you need them to send to you

  → if you're interested in this position, respond by 5pm, 'tomorrow's date' with the following:

  → a cover letter addressed to [your name] and

  → 3 reasons why you're a good fit for this position

- Then wait for those responses....it will weed out the disinterested.

Hint: if you save your email response with the challenges and only change the date of their required response, you will save yourself a LOT of time.

Only offer a phone interview to those who followed ALL of the 3 instructions in your response email.

Do NOT alter this just because someone had a great looking resume! If they don't follow written instructions, they won't be able to follow verbal instructions. For my PTs and OTs out there - think of your training. One thing we look at with neuro patients is their ability to follow single vs multi-step commands. Don't you want your staff to be able to do that?

In your phone interview, you will want to listen for how they act, react, and handle themselves on the phone.

Remember, a good portion of your front desk patient management happens on the phone. If their phone skills are terrible with you, they won't change when the applicant is handling a patient.

You should also qualify the following: WHY they want this position, HOW they can see themselves becoming a part of your practice family, and WHAT they see themselves doing in a year or two years. Make sure you qualify salary, hours, and what experiences they bring with them that will help them in this position.

Bring them in for multiple interviews and challenge them.

At the first in-office interview, we test them on how well they communicate with patients, answer the phones following our script (if you're currently using the Fix Your Front Desk online system, you have the script and can use that when testing a potential hire), and how they interact with patients who are checking in and out.

On a second in office interview, we do even more advanced challenges: like scheduling out a POC using the scripting I provide in the Fix Your Front Desk academy. We give them 10 min to study the scripting while they're in the office and then have a fake patient come up and have them get them scheduled out.

Also make sure other team members interview them.

You want to have your trusted team members interview the applicant as well. Because some applicants will be on their best behavior for you managers and owners, but a completely different side comes out when they're talking to your team.

We also have our PTs interview the applicant in front of patients. It's AMAZING what patients will say to you about an applicant. Remember, your patients are vested in you having a good team because they recognize HOW it will affect them during care. And they'll tell you who they like and why; and they'll tell you who they don't like and why.

As you can see, it's all about following a set process and not letting someone slide because you think they will be a good fit. You need them to prove they are the best fit in that unit of time. That keeps the practice moving forward and helps you to thrive instead of merely surviving.

Here's one last tip: It isn't just about mastering a recruiting and hiring process. It's training them up so they can and will perform to the best of their abilities. With training you give them the tools for success. Success comes from training them to work as a team, to manage patients so the clinicians can treat them.

And so, **along with hiring the right staff, it becomes your responsibility to get them trained up so they can handle the crazy objections that patients throw their way and can help more people get the care they need and deserve.**

The Art of Training Your Team for Success

Have you ever hired someone with 'experience' for your front desk? And when they came on board you immediately noticed that they came with their own way of doing things? Ones that created confusion or weren't in your practice's best interest?

Do your PCCs struggle knowing what to say when a patient same-day cancels or no-shows? Or maybe each PCC has their own way of handling it?

Do you ever hear your front desk staff ask a patient if they want to reschedule?
Or ask them when they want to come in next?

If you answered yes to any of these, you're not alone. The good news is that there's a solution!

Often, we hire the right people for our front desk. But once they're hired, if we don't provide specific training in proper patient management, the following can happen:

- They each create their own way of doing things (thus increasing the confusion at the front desk and with patients)
- The message we're putting out isn't clear (when each PCC has their own way of doing and saying things, it doesn't put out a consistent message and that also increases confusion and upset for other team members and for patients.
- They struggle to handle common patient objections to getting care. (And this leads to patients not regularly being seen for the care they need and deserve)
- They produce less than expected. (without full understanding of what's expected and how to get it done, new hires will produce less. It's not because they're bad people, it's because they don't have a map that guides them)

So now that you've hired them, how do you get them trained to produce?

Here are a few things you can do to ensure they're successful right from the start.

Don't use on 'on-the-job training' as your primary method of training.

Often practices will have one front desk team member train a new hire. I don't recommend this option as it can turn into a 'game of telephone' like we played as children. Do you remember that one? We all sat in a circle and the teacher whispered something in one

child's ear and then they told the student next to them and it went like that all the way around the circle until it got back to the teacher. And then we all laughed at how the initial word or statement changed as it went around.

Another on-the-job technique that I strongly discourage is putting a new hire who comes to you with 'previous experience' right into the front desk position. Make sure you train them in your processes and procedures so you can be sure that they're using standard procedure when managing your patients. Remember, you took the risk to build your practice, don't skimp out on training new hires with the hopes that their previous experience will do the trick. It's dangerous and could cost you patients.

Ensure that you have a training process in place that provides standard procedure for ALL front desk tasks and actions.

Make a list of all the tasks, actions, + procedures they need to learn.

When you create your list, put it in order so it flows as that will ensure their training flows. If you don't have a set flow for the training, there will be inconsistencies and confusion. And when a new hire gets too confused, they're more likely to quit early on.

Also when you have a list of topics, you have a plan for the training process, and you'll be able to follow it and onboard the new hire more efficiently.

Have a training checklist.

You want training to go well so you need a checklist to ensure you and the new hire follow a specific path. The new hire checklist should be easy to follow. This will ensure that nothing is forgotten as you train them.

Checklists also help you ensure that important topics are covered at the right time in the new hire's training. When you use a checklist, you will also be able to evaluate your new hire and their skills all along. Remember, consistent training practices ensure that your team members receive the correct information at the right time in your process.

Have a training manual to instruct them on your standard procedures.

Now is the time to write up your training manual and put standard procedure in place. Without proper training, your team WILL create their own standards for patient management and they'll each have their own way of doing things. This alone creates confusion and upset in the practice.

The fastest way to lose a new hire is to not have standard procedures for patient interaction and management at the front desk. There are too many variables that can get left up to

chance and it will result in lost patients, lost staff, lost time, and lost revenue. This leaves the practice vulnerable and open to further problems.

Training manuals also provide a way for you to test your new hire against your practice's set standards. If you don't have it written up, you won't have a way to evaluate your new hire as you train them.

Make sure you set aside time for training your new hire.

Training times are essential, and all new hires should receive the proper training right from the start. So, it's essential that you set aside the time to train with them, to put them on post, and to evaluate them on recent skill sets that were learned.

Provide standard scripts to control patient interactions.

When you use scripts for patient interactions, you ensure your team has the tools necessary to improve certainty when managing their patients. You also ensure that they're saying the right thing at the right time which helps build stronger patient relationships and keep the patient following the right path through care.

But, scripts are only as successful as the new hire understands and uses them as instructed. Never hand a new hire a script and send them on their way. Make sure they're trained and skilled at using it. Make sure they understand its purpose and when they should use it.

Regularly train and retrain your front desk staff on the use of your required scripts. It's easy for them to fall out of use and that alone can cause your clinic metrics to go down.

Drill common patient interaction scenarios

First, you'll need to have specific processes to follow to ensure proper patient management. Without having a process in place, your team will each create their own and it likely won't meet your expectations. Once you have your patient management processes in place, it's time to practice scenarios so the team stays on point and handles patients according to your expectations.

This is also a great way to help them master their scripting, so everything flows smoothly when they're working with their patients.

Have a way to evaluate their understanding and skills along the way.

Your goal is a fully trained front desk team member within the first 90 days. But you don't want to wait 90 days and take up valuable time training someone who can't or won't learn and implement the scripting and procedures that are standard to your practice.

So, you need a way to evaluate their learning and performance as you train them. One rule we follow is that you train them on a task, drill it with them, and then put them at the front desk to see if they effectively use what they just learned.

If they do, it's a win and you keep moving forward in their training. If they don't, you take them back and retrain them. And we don't train someone over and over on the same action or procedure. If it isn't working out within the first 30 days, we end the relationship and move forward. This is essential when it comes to proper patient management. **Remember, we're working to build a team that ensures our vision becomes a reality.** So, we must ensure our team is trained to a set standard. THIS is where expansion begins, and the practice thrives.

The better training you have in place, the more you'll be able to hold your team to your precise standards, the better off your patients will be.
When you're able to effectively manage your patients and ensure they get the care they need and deserve, the more reach you will have.

If you're struggling to create training that provides your front desk with a way to learn proper scripting and standard procedures to use with patient management, there is an easier solution.

You don't have to wait, and you don't have to try to create your own training and standard patient management processes. I've spent 10 years building a successful system of training for my team and others across the US and Canada and my programs get results.

Have YOU ever considered specialized training for your front desk?

Here's a simple checklist I use with practice owners and managers to help you determine your front office training needs. Check the statements that apply:

_____ My front desk is disorganized – they are trying to do everything at once.

_____ I don't have a training manual that provides standard patient management procedures.

_____ Everyone is doing their own thing – there's no consistent process or message.

_____ When patients same-day cancel, my front desk isn't sure how to handle them.

_____ The front desk doesn't know how to manage a rude or unpleasant patient.

_____ Less than 95% of our patients are scheduled for a full plan of care each week.

_____ I don't know how to train my front desk staff.

_____ My arrival rate is less than 92% per week.

_____ I'm spending more than 10% of annual revenue on marketing and promotions.

_____ My return on investment for marketing actions is lower than desired.

_____ I find my front desk staff creating their own way of doing things.

_____ I have a high turnover at my front desk.

_____ I want to provide consistent training to my front desk staff so they can be successful.

_____ We struggle with collecting the patient responsibility at the time of service.

_____ The front desk is not consistent in getting all patients rescheduled.

_____ I'm tired of doing it all on my own.

_____ My front desk says things like: *"would you like to reschedule?"*, *"could you come in at…?"*,
"would that work for you?"

_____ I have a high rate of new patient cancels or no-shows.

_____ I have another front desk team member train a new hire 'on-the-job'.

_____ I'm sick of all the confusion in the front office.

_____ Our schedule is poorly controlled with open spaces and few refills each day.

_____ I plan to sell my practice in the future and want to increase the value before I do.

If you checked any of the statements above, your front desk needs training.

(but figuring it all out on your own can be difficult…)

Why continue to struggle? I have the solution!

At Front Office GURU, YOU now have [TWO options](#) for training your team.

- One-on-one coaching and training (Schedule a FREE Call **[here](#)** to learn more)
- My Virtual Front Office Training Academy

My Virtual Academy offers complete patient management training:

- Talk to patients to manage the conversation (and remain lovely & welcoming to patients)
- Convert potential patient leads to scheduled AND arriving new patients
  (more referrals and leads converted, getting more of those evals to arrive)
- How to talk about the cost of care so patients don't run away or cancel all their
  appointments due to cost (this includes OON and cash pay scripts as well)
- PREVENT Cancellations – my program teaches how to make the policy known, what key
  points to review, and how to handle someone calling to CX and keep them on for today
- Schedule out a full plan of care at the evaluation
- How to master schedule control so your schedule is full before start of business today

My Virtual Front Office Training Academy

With my online training academy, you can easily train your current and future front desk team
members.

It's accessible to you and your team 24/7, and your practice will have its own training portal where
you each have your own access; and the manager can add and monitor the team.

I didn't hold anything back in this academy and you more than get what you pay for! My lessons are
laser focused on patient management from the first call through a completed plan of care. You can
follow the path I suggest or head straight to your main problem area to tackle that first.

I've spent over 10 years honing this training, so you don't have to.

The purchase price for the course includes:

- Over 100 video-based lessons
- A training workbook for each level (that includes practical learning questions, scripts with
  associated audio demos, references, and implementation instructions)
- Implementation instructions for each level
- And all the digital files you need to implement right away
- Base price includes access for 1 manager and 2 staff
  (purchase more seats in your account or message me for special pricing for teams over 8)

And, if someone leaves, you can reassign their training portal to your new hire!

[CLICK HERE to LEARN MORE and get started in the Academy today.](#)