



# THE POWER OF CALL FLOWS

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# The Benefits of Call Flows

Revolutionizing patient experiences. Slashing payroll costs. Optimizing every call.

These may sound like lofty goals. But they're truly within reach when you master the art of crafting killer call flows.

See, convoluted call routing steals precious minutes from people's days and drives callers crazy. Yet with some simple planning, you can seamlessly guide patients to resolution, creating raving fans.

Call flows help agents handle calls quicker and provide callers with a more direct line to troubleshooting, allowing them to resolve the call in a shorter amount of time. This can lead to improved performance for both the company and individual agents, as well as increased customer satisfaction.

But here's the deal - you don't need some programming prodigy to architect these things. With a step-by-step blueprint, anyone can build flows that delight.

That's exactly what you'll get today - a repeatable formula to create seamless experiences using proven call flow techniques. I'll make you a routing guru in no time.

And when shorter calls, happier patients, and lower costs come knocking? You'll smile knowing your days of call chaos are done.

The stats speak for themselves. Companies using well-designed call flows see over **50%** faster issue resolution, **35%** higher CSAT scores, and **23%** lower payroll costs.

Data collected by The Ascent Group suggests that measuring First Call Resolution (FCR) for a year can improve call center performance by up to **30%**.

## Introduction to Call Flows

Dear colleagues in healthcare, allow me to guide you down the practical path of call flows, where creativity meets simplicity.

### Definition of a Call Flow

In our daily work, we face many challenges, one of which is directing patients to the right place at the right time. That's where a call flow comes in.

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**a structured set of steps that guides the progression of a phone call from initial interaction through resolution.**

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Think of a call flow as a straightforward roadmap for phone calls. Just as we guide our patients through their care, a call flow guides a caller to the right destination through a series of decisions and prompts. It's not a fancy gadget; it's a tool to make our lives easier.

## B Addressing False Beliefs

Some of you might have heard a few tall tales about call flows. Let's set the record straight:

| Myth                                         | Truth                                                                                        |
|----------------------------------------------|----------------------------------------------------------------------------------------------|
| Call flows are only for tech wizards.        | You don't need a magic wand to create a call flow. With a bit of guidance, anyone can do it! |
| Building a call flow is complex and painful. | It's not surgery; it's common sense. And I'm here to guide you through it, step by step.     |

## C Rule of ONE

Remember the first RULE OF ONE!

### ONE place to go, for ALL flows, fitting ONE standard format

*Let's break it down*

-  **ONE place to go**   
This means that agents should have a single, centralized resource or platform where they can access all the information and tools they need to handle customer queries. This reduces confusion and saves time as agents don't have to navigate through multiple systems or databases.
-  **For ALL flows**   
Regardless of the nature of the customer's request or the process that needs to be followed, this centralized resource should be equipped to guide the agent through it. This includes everything from simple queries to complex troubleshooting.
-  **Fitting ONE standard format**   
All the information and workflows in this centralized resource should follow a consistent format. This makes it easier for agents to understand and follow the processes, reducing errors and improving efficiency.

The Rule of One is important because it:

-  Improves consistency - Agents work from the same updated playbook.
-  Boosts efficiency - No hunting for the right flow or figuring out formats.
-  Enables flexibility - Easy to cross-train agents across flow types.
-  Facilitates change - Simple to update flows and ensure adoption.
-  Reduces training time - Standardized documentation speeds onboarding.
-  Increases compliance - No risk of rogue processes or outdated flows.

By providing ONE unified source of truth for call flows, contact centers gain alignment, efficiency, and optimal customer experiences. This rule is foundational to call center success.

## Aim High - Call Flow Goals

It's time to define your call routing goals. And here's the deal - they must be RUTHLESSLY patient-focused.

Why? Because above all, your call flow exists to deliver quick, painless, first-call resolutions. So set audacious targets like:



**60** second maximum wait time. Patients are busy. Make it snappy.



Under **2** minute average handle time. Quicker calls equal more calls and happier folks.



**1** call resolution **80%** of the time. No frustrating callbacks and transfers.



**95%** satisfaction rate. Patients should grin after calls...then tell all their friends about the amazing service.



**20** hours saved weekly. Optimized routing saves serious operator hours. Cha-ching!

Track payroll, revenue, and CSAT numbers before and after. The lifts will shock you.

And know this - these types of goals ARE possible. With laser-focused flows built for speed, transparency, and simplicity, you'll get there much faster than you ever imagined.

Rome wasn't built in a day, but with a solid blueprint, those targets are within your reach. Time to wow patients and do your accountant proud

As we create well-designed call flow for agents, we will achieve:



### **Team Benefits:**



- Improves collaboration as all agents work from the same flow
- Facilitates easier training and onboarding of new hires
- Makes cross-utilization and shift coverage simpler
- Increases team-wide first-call resolution rates
- Reduces need for supervisor input on call handling
- Helps identify coaching opportunities when deviations occur
- Provides standards for evaluating individual and team performance
- Enables easier coordination and shared best practices



### **Individual Benefits:**



- Provides clear guidance on handling diverse call types
- Reduces time spent figuring out next steps
- Enables faster issue resolution and first-call resolution
- Allows focus on patient needs rather than process navigation
- Boosts confidence in ability to resolve issues
- Lessens stress and mental fatigue from unclear expectations
- Enhances ability to deliver consistent, high-quality service

Well-designed call flows empower agents to provide exceptional individual service while aligning the team for optimal efficiency, consistency and flexibility.

# Build A Simple Flow

## Identifying Call Types: A Step-by-Step Guide



### Start with a Provisional List

The key components of a call flow typically include:

- Greeting and identifying the caller
- Determining the purpose of the call
- Triaging based on call urgency or type
- Following established protocols to resolve the issue
- Documenting relevant details of the interaction
- Confirming issue resolution with the caller
- Closing the call politely and professionally

Each specialty tends to have its own call types. Find a call type list for your specialty here: [{link}](#).



### Categorize Call Types:

Group similar call types together for easier handling.

We recommend something like:

- Scheduling
- Symptoms
- Health education, test results, and prescriptions
- Records & Documentation
- Billing & insurance



### Call Flow Template

Every call has the following general outline:

- Greeting
- Identify caller
- Determine call type
- Determine acuity (e.g. routine, urgent, etc.)
- Handle the call
- Closing
- Document the call

Download the CORE CALL FLOW OUTLINE [here](#).



## Create Handling Rules

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For each type of call, do the following:

What information needs to be collected?

What data needs to be looked up?

What actions can be taken or services performed?

What call handling or routing steps should be taken?

B

Outline the handling actions in step-by-step, hierarchical format



**Start with High Priority Rules:** Create rules for the most urgent calls first, such as emergencies.



**Create Rules for General Inquiries:** Determine how standard calls should be handled.



**Include Backup Plans:** What happens if the first-choice agent is unavailable? Define fallback plans.

When you are ready for tips on making a SIMPLICITY STANDARD for handling rules, you can find a checklist [here](#) and a sample guideline [here](#).

# Start Small, Iterate and Improve

Over time, add to the “Call Type” list by doing the following



## Review Existing Data

- **Examine Call Logs:** Look at any existing records or logs of previous calls.
- **Analyze Customer Service Tickets:** If there's a support ticket system, this can give insights into common inquiries.



## Talk to the Agents

- **Interview Agents:** Agents who handle calls daily will have first-hand knowledge of the types of questions and issues callers have.
- **Conduct Surveys or Focus Groups:** Gather information from agents about their experiences and the types of calls they handle.



## Monitor Calls

- **Listen to Live Calls:** With proper permissions, monitoring live calls can provide real-time insights.
- **Review Recorded Calls:** If calls are recorded, listening to a selection can help identify common themes and categories.



## Consult with Other Departments

- **Speak with Medical Staff:** They may have insights into the types of medical inquiries that are common.
- **Coordinate with Administrative Staff:** They can provide information about non-medical call types like appointments, billing, and general information.



### Utilize Technology

- **Implement Call Tagging:** If possible, use a system that allows agents to tag calls with specific categories or keywords.
- **Analyze Data with Analytics Tools:** Some systems might offer analytics tools to categorize and analyze calls based on content and context.



### Create a Provisional List of Call Types

- **Compile the Information: Based** on the data gathered, create a preliminary list of call types.
- **Categorize Them:** Group similar call types together for easier handling.



### Test and Refine

- **Implement the Categories:** Use the identified call types to create handling rules.
- **Monitor the Effectiveness:** See how well these categories match real-world calls.
- **Refine as Necessary:** Based on observation and feedback, make adjustments to the call types as needed.



### Document and Train

- **Create a Clear Guide:** Include the identified call types in agent training and documentation.
- **Provide Training:** Ensure that all relevant staff understand the call types and how they are being used in handling rules.