## Continuous Improvement Toolkit

# Call Management

## Learning Objective: *To understand how call management can provide valuable information to your practice and how this information can improve patient and staff satisfaction.*

## What is Call Management?

Call management involves analysis of phone call data including number of incoming calls, answered calls, dropped calls, voicemail messages, peak call times, and length of calls. The gold standard is a dropped call rate of <5% and a time to answer of <30 seconds.

Your current phone system may not provide this information, or at least easily. This may mean using reporting software or considering a modern VoIP telephone system.

## Why implement Call Management?

Calling a practice is often the first point of contact for your patients. A positive first contact will enhance the patient experience. Effective call management and data interpretation allows the practice to understand times of unmet demand and patient access issues resulting in increased patient satisfaction and a less stressed reception team.

## Who does what?

|  |  |
| --- | --- |
| Staff | Role |
| Receptionists/Administrators | Play an active role in using call management data to improve processes.  Be open to changes in how you work. |
| Nurses | Play an active role in using call management data to improve processes, especially the nurse phone call process. |
| General Practitioners | Play an active role in using call management data to improve processes, especially in relation to triage. |
| Management | Provide rationale and leadership for this improvement.  Engage relevant staff into a project team.  Review current call management data and whether this meets your needs.  Consider options for getting any required data.  Consider what improvements you want.  Plan steps needed to get from current state to future state and implement. Use a PDSA approach.  Allocate resource as indicated by data. |
| WellSouth | Support the practice in understanding and interpreting call management data.  Support in using this information to improve processes within the practice. |

## Measurements

Your telephony provider should provide reporting on:

* Hourly/daily/weekly/monthly number of incoming calls
* Caller ID & call date/time
* Answered calls
* Dropped calls
* Time to answer
* Call length including average call length

## Implementation timeline

Planning

* Identify telephony provider
* Engage staff around the benefits of implementing call management
* Fund any equipment or software changes which are required
* Create a call management project plan

Data Analysis

* Set-up a process to routinely analyse data
* Analyse data for a minimum of 2 weeks

Implement change

* Use the data to consider improvements in processes. This may be:
  + Phones off the front desk and moved to a quiet area in order to create capacity
  + Increased telephonist resource during peak call times
  + GP and/or Nurse call process review
  + Consider the answering service flow and how it impacts other processes
  + Consider use of alternatives to telephone contact, such as patient portal, your website/social media

Ongoing

* Continue to review your data
* Make further changes as required

## Patients

It is important to convey changes in the practice which may impact patients. This could be conveyed through your website, social media, or bulk email/text.

How to measure success  
The primary measure of success is a reduction in your dropped call rate and an improvement in your time to answer. The goal should be a dropped call rate of < 5% and a time to answer of < 30 seconds. The practice should aim to consistently meet these goals each month. Further measures of success include patients and staff reporting increased satisfaction.

## Helpful Tips

* A new telephony system can be an expensive outlay, but it can tie in with other system improvements such as installing fibre internet connection or moving from locally hosted to cloud-based services.
* An important part of call management is prioritising the patient who you are speaking with. Telephones should be removed from the front desk and moved to a quiet area, where telephonists and reception staff can deal with the patient in front of them without distraction.
* A process map showing the contact points between patients and staff within the practice is a useful tool to better understand call flow and improve call management.
* It is not always feasible for a Nurse or GP to answer a call from a patient straight away. The process around call backs and patients who leave voicemails for GPs/Nurses should be reviewed as part of the call management process.

## Further Resources

Call Management Project Plan