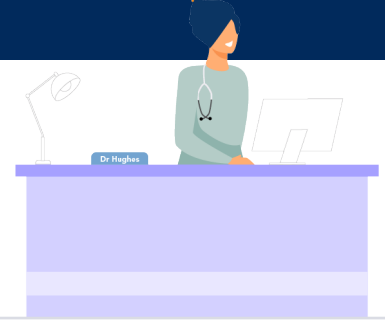




## Checklist

Here are a few things to consider when thinking about call flows and routing choices. This will help to ensure the process is as efficient and manageable as possible:



- ✔ Start by thinking about the path you want patients to go on, consider breaking the messaging into categories/bite sized chunks of where you are trying to get the patient to and what problem are you trying to solve. With this end goal in mind it will make the planning easier.
- ✔ Think about what amount of time you want the patient to remain in the queue going through menu options? (Lots of menus can be frustrating, not too many, time before on journey...)
- ✔ Ask for others opinions too, get them to listen to the messaging and feedback on what feels like the right length of messaging, a good example is engaging with your Patient Participation Groups (PPG).
- ✔ Engage with your staff too, what are the issues they are having with the current call flows and look for ways to improve those, bring the staff on the journey to realise the benefits.
- ✔ If you're not confident with X-flow, build a call flow with one of your spare numbers and don't make it live straight away. Play with it, listen to it, refine it and then deploy it against the correct working number.
- ✔ Think about your opening and closing times, do you close for lunch, do you have protected learning time, what do you want to happen when patients call at these times - do you have an external service to transfer calls to?
- ✔ Think carefully about how you group your staff together for call routing purposes, be careful not to cause a bottleneck if many groups contain the same staff members.
- ✔ Think about staggering specific calls through the day to make it easier on staff demand, for example, only deal with test results after 2pm when you are more likely to have received them from the lab.
- ✔ Consider using different voices for different messages, this will help the patient to feel like they are now taking a different route, keeping the experience fresh. You can even record some messages with the voice of a recognised Healthcare Professional from within the practice - this can have more impact and endorse the information being imparted.
- ✔ Look at ways to gather information for your call handler through the use of the Whisper feature. For example, by linking the whisper to the menu choice, the call handler will be told that the patient selected i.e. diabetes or cervical screening or asthma before they answer the call which will provide a split second to process what the call is going to be about. This can take seconds off a call length.
- ✔ If using SMS for things like pushing Online Consultations or using the NHS App, be specific in the website links you share so it takes the patient right to the area of information they need, cutting down the time taken and improving the experience.
- ✔ Consider implementing the Patient Callback if you are not already using and then understand the advanced features such as setting thresholds and making use of the SMS function to allow patients to track their position in the virtual queue
- ✔ Decide if you want to offer your patients the option to check or cancel an appointment, this can have a big impact on the number of calls coming into your surgery.
- ✔ Can you break down cohorts of patients and give them a more specific experience, speeding up the call process for them and others
- ✔ We recommend ensuring more than one person within the surgery works on the call flows, that way ideas can be bounced around, and more than one person understands the processes and can therefore be more supportive.
- ✔ Think about your business processes before implementing changes to the call flow, ensure all your background operations will be able to support the routing choices made.
- ✔ Be mindful to still give the patient the option to get through to a member of staff and speak to them - this is a requirement of the GP Contract so don't get too carried away!