Lead Center Mastery

If your practice were a car, the Lead Center would be your dashboard — your marketing dashboard, showing you the key information you need to maximize new patient leads and optimize patient communication.

Use the MedPB Lead Center to screen calls; follow up on leads; optimize new patient scheduling and manage existing patient communication. You can view key information about a caller before you answer the phone or respond to a text message.

The MedPB Lead Center will help your front office team provide outstanding patient service and convert more new patient leads into appointments.

Take a quick tour: **watch this video.**

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How does your Lead Center work?

MedPB uses extended caller ID to obtain information in the Lead Center associated with each caller's phone number.

With MedPB's Lead Center, you can place an outbound phone call or outbound text message to any telephone number through one of your tracking numbers. This includes returning calls to patients who have already dialed your tracking number or placing calls to another number. It also includes responding to patients via text messages through your call tracking numbers.

The MedPB Lead Center divides callers into three different categories:

1. Calling Now: Patients who are currently calling your tracking phone number, but whose call has not yet been answered.

2. Active Calls: Patients who are currently speaking with a member of your team.

3. Recently: Patient who recently called your tracking phone numbers.

The Lead Center Interface & Timeline

Lead Center will create a timeline for each patient which will include:
- Previous calls from the patient
- Call recordings
- Text conversations
- Text message frequency
- Tags and notes for each call
- The caller's CallScore

You can also mark calls as spam and edit the caller's tag, note, lead status, and value in the Lead Center timeline.

How to Add Agents

MedPB will set up your first Agent in the system. An agent is the person in your office you want to use the Lead Center. Contact your Practice Advisor to add additional Agents.

If your front desk manager would prefer to receive calls through their computer softphone we can set up your profile to accommodate this.

Alternatively, you can use the online Lead Center and make outbound calls from your office phone or any landline or cell phone. (Instructions are below.) Just click the button in the Lead Center and the system will dial your landline office phone. Simply press 1 and the outbound call to your patient will be completed.

Outbound Calling

Use the instructions below to place an outbound call in your Lead Center.

1. Choose the tracking number you'd like to use as your caller ID from the drop-down list. (Typically this will be your website tracking number and it will be labeled as such).

2. Click Lead Center at the bottom left of the page.
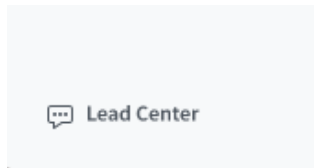
3. Select the Dialer button in the bottom left of your Lead Center screen.

4. You can also click the phone call icon next to the phone number or person's name to make an outbound call.

5. Your outbound dialer will appear on the left side of the page.

6. Enter the phone number that you'd like to call or click the phone icon in the Timeline next to the phone number and patient name. The system will log the call and, if you choose Record Outbound Call, it will record the call.

7. In the Call From field, select the tracking number you'd like the patient to see on their caller ID. We recommend starting with the number they called.

8. Click the checkbox to Record Call if your account is set up to record outbound calls. You will need to train your team to say, "Calls may be recorded for quality assurance".

9. If you want to call from your office phone, click "Connect with your phone" and enter the number. If you don't choose this option, you can call using your headset and computer.

10. Click Begin Call.

11. Your office phone will ring and you'll be asked to press 1 to connect the call. Once you answer, Lead Center will dial the patient for you. From their perspective, it's as if you called them directly from your phone, except your tracking phone number will show up on their caller ID.

12. If you prefer, you can use your headset on your phone. In this case, it's still a one click dial; the system calls your phone then connects you with the patient.

Text Messaging

When you send a text message from your Lead Center, from the recipient's perspective, it's as if you texted them directly from your phone, except your tracking number will show on their caller ID. Send new messages to potential leads, respond to incoming texts, and view any previous correspondence you (or someone else on your team) had with a patient.

All of your text messages to and from a patient will appear in the caller timeline within your Lead Center, giving you insight into your communication over time.

Text Message Suggestions

Introductions for new patients starting a conversation

Thank you for contacting (your practice name), I am a real person, this is (PCC name here), how may I help you?

If they start with a question:

Thank you for contacting (your practice name), I am a real person, this is (PCC name here), may I get your name?

If they ask several questions and start discussing PHI (private health information) try to get them to allow you to call them:

Can I give you a call to discuss this? It's too much to text.