1st Family Dental uses Invoca conversation intelligence to drive more new patient calls, improve call center experiences, and coach agents to improve close rates.

1st Family Dental Uses Invoca to Drive and Convert More Appointment Calls

Results at a Glance

- 32% decrease in cost per phone lead
- 42% more calls converted to new patient appointments
- Improved agent coaching with call recordings and transcriptions
- Recaptured lost appointment opportunities

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THE CHALLENGE

1st Family Dental is Illinois’ leading dental services provider, with 14 locations across the state. They offer a full range of general, specialty dental, and orthodontic services for the whole family.

To generate appointments from new patients, 1st Family Dental runs a full range of online and offline advertising programs, from Google and Facebook ads to billboards and postcards to affiliate marketing like 1-800-Dentist. And while prospective patients can convert online in a number of ways — including through chat and web forms — most prefer to engage with 1st Family Dental by calling.

“Phone calls are still the most popular way that new dental patients book appointments,” said Vicky Khawaja, Director of Sales and Marketing at 1st Family Dental. “Over 75% percent of our new patient appointments come in over the phone.”

Khawaja runs 1st Family Dental’s marketing programs and manages their call center agents. With the call channel being so important to new patient acquisition, she knew she needed a way to track and optimize:

1. How marketing dollars drive phone leads to the call center
2. How those call center agents convert callers to appointments

“I needed to know how many phone leads are being generated from each marketing channel and how many are booked,” said Khawaja.
I chose Invoca because they are the only solution that provides the data, technology, and expertise we need for new patient calls. Invoca is more than a technology provider — they are a true partner whose people work with me regularly to ensure our success. We are extremely happy with the service and results.”

THE RESOLUTION

Invoca provides 1st Family Dental with a complete, end-to-end solution for new patient calls

1st Family Dental partnered with Invoca for a complete solution for measuring, analyzing, and converting inbound phone calls. “I chose Invoca because they are the only solution that provides the data, technology, and expertise we need for new patient calls,” said Khawaja. “Invoca is more than a technology provider — they are a true partner whose people work with me regularly to ensure our success. We are extremely happy with the service and results.”

How Invoca’s solution works for 1st Family Dental

The Invoca conversation intelligence platform provides 1st Family Dental with end-to-end tracking and management of new patient calls. Here is how it works when a consumer calls 1st Family Dental:

1. A Call Is Generated
   - **Call Tracking:** Invoca tracks the exact marketing source that drove the call, including the channel, campaign, ad, search keyword, and webpage they called from. It also captures who the caller is, their phone number, and the dental location they are calling for (if they called for a specific location). All this data is available for 1st Family Dental to leverage at the time of the call and later in Invoca reports.

2. Call Qualification and Routing
   - **Call Routing:** 1st Family Dental wants all new patient calls to go to their call center — where agents are trained to assist and convert them — not to the locations. So Khawaja has configured Invoca to send all calls from 800 numbers on the website, billboards, postcards, and other sources directly to her call center.
   - **IVR to Qualify Calls to Locations:** However, if a website visitor calls a number for a specific location, they are directed first to a custom Invoca IVR that asks them to indicate if they are a new patient or an existing patient. The IVR then routes new patients to the call center and sends existing patients through to the location.
3. **Call Experience and Analytics**

- **Call Information Passed to Agents:** For calls routed to the call center, Invoca passes the call tracking information to the agent before they take the call via a visual screen-pop on their desktops and an audible message whispered to them before the call begins. This way the agent is armed with insights on who the caller is and why they are calling, leading to a better call experience and higher conversion rates.

- **Call Recording:** Invoca records the conversation and stores it with all the call tracking information for later reference. Recordings help Khawaja confirm the lead quality of calls and diagnose why some calls convert and others don’t, which she then uses to coach agents to improve performance.

- **Call Analytics and Outcome:** Invoca captures if the call was answered and the duration of the call. Agents then enter into Invoca whether or not the call was a new patient opportunity, if they converted to an appointment with a specific location, and if not, what was the reason. All this data is connected to the marketing source that drove the call, enabling Khawaja to understand exactly how each marketing program is driving quality phone leads and bookings.

4. **Marketing and Call Center Performance Reporting**

- **Marketing ROI Reports:** Khawaja regularly examines Invoca reports to see how her marketing dollars and programs are driving calls that convert to new patient appointments. She can then make adjustments to improve ROI and new patient acquisition.

- **Call Center Activity Monitoring:** Invoca provides Khawaja with detailed metrics on phone call activity to help her efficiently manage call center operations. She can view trends in call volume to determine how to staff her call center most effectively. She can also view each agent’s call handling metrics — including number of calls they answered and converted and how long they took for breaks and lunch — to detect and correct issues.

“Invoca enables us to smartly invest our marketing budget for what drives the most new patient calls. For example, Invoca data showed that while paid search advertising drove a high volume of calls, those calls weren’t converting to appointments at a high rate. Adjusting our paid search spend helped drive better ROI.”
“With help from Invoca, we’ve reduced our cost per phone lead by 32% while converting 42% more calls to new patient appointments.”

How 1st Family Dental drives better business results with Invoca
Invoca plays an important role in helping 1st Family Dental prove and improve performance and generate more new patient appointments. According to Khawaja, Invoca helps her and her team:

- **Prove Marketing and Call Center Performance:** “With Invoca’s data and reports, I know exactly how our marketing dollars drive calls that convert to appointments, so I can prove to our board the real return we are getting on our programs. I can also assure them that every call is captured and either answered or called back right away.”

- **Improve Marketing Results:** “Invoca enables us to smartly invest our marketing budget for what drives the most new patient calls. For example, Invoca data showed that while paid search advertising drove a high volume of calls, those calls weren’t converting to appointments at a high rate. Adjusting our paid search spend helped drive better ROI.”

- **Coach Agents to Improve Performance:** “Invoca call recordings help me evaluate the performance of call center agents and ensure they are providing prospective patients with the best experience. I also have agents listen to their non-booked call recordings for self-evaluation and improvement.”

- **Recapture Opportunities with Invoca Lost Sales Recovery:** “If a caller hangs up before reaching an agent, we have the data from Invoca to call them back immediately. Before Invoca, many callers that didn’t leave a message would be lost opportunities.”

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THE RESULTS

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Improved agent coaching with call recordings and transcriptions

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Learn more about how leading marketers are using call tracking and conversation intelligence to drive revenue at invoca.com/customers.