

# Maximizing Staff Efficiency

## In Office & Remotely

### HOW TO USE THE EFFICIENCY CHECKLIST:

- For each task, determine who manages the tasks:
  - In-house
  - Outsource completely to a vendor
  - Use a combination of both
- Note which vendors you are currently using, or will need to use.
- Determine where tasks can be done:
  - In the office
  - Remotely
  - Use a combination of both
- Make sure to have designate task managers. Even if tasks are outsourced, a team member will still need to manage the vendor relationship.
  - Primary task manager
  - Back-up person
- Note any to-do items, such as contacting new vendors, staff training and updates, or reviewing current processes.
- Engage your team and communicate any changes and calls to action.

TASK	OUTSOURCE/ IN-HOUSE	VENDOR	IN-OFFICE/ REMOTE	PRIMARY & BACKUP	NOTES
Inbound Calls	In-House	Mango Voice	Both	1. Sue 2. Cathy	Remote staff to use Mango app to answer calls. Announce at huddle no cell phones used for work calls.
Voicemail Greetings	In-House	Mango Voice	Both	1. Sue 2. Cathy	Sue to review voicemail and auto-attendant options. Re-record voicemail if needed.
Overflow & After Hours Calls	Outsource	CallForce	N/A	1. Cathy 2. Joan	Cathy to set up CallForce. Debrief team on the service at daily huddle. Emergencies still go to Dr. Jones' cell.
Recall & Unscheduled Treatment Calls	Both	CallForce	Remote	1. Carrie 2. Sylvia	Carrie to work the unscheduled treatment list from home. Sylvia to assist as time allows. Callforce is making hygiene calls.

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Inbound Calls					
Voicemail Greetings					
Overflow & After Hours Calls					
Recall & Unscheduled Treatment Calls					
Online Scheduling					
Appointment Confirmations					
Check-In/ Check-Out					
Website Leads/ Web Chat					
Social Posting					
Insurance/ Collections					
Other: <input type="text"/>					
Other: <input type="text"/>					
Other: <input type="text"/>					
Other: <input type="text"/>					