

TELECOMMUNICATIONS

OUTLINE

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KEY TERMS

Call forwarding

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LEARNING OUTCOMES

Mastery of the content in this chapter will enable the reader to:

- Define key terms
- Define telecommunications
- Explain the application of telecommunications in a massage office
- Describe various types of telecommunication systems commonly used in a massage office
- Practice efficient telephone techniques
- Receive, transmit, and record telephone messages
- Plan and place outgoing telephone calls
- Use the features of special telephone equipment and services
- Describe the best way to manage telephone calls commonly encountered in the massage office

The telephone is the most important piece of equipment in the office. It is the most common and most important communication device in the world because it is the fastest and easiest way to transmit messages.

For 90% of the clients in a massage office, the first contact is made by telephone. Like it or not, first impressions are lasting ones, and telephone management is an area that deserves more attention. Effective communication on the phone requires that you have a broad knowledge of therapeutic massage, possess a high degree of self-confidence, are alert, are able to make decisions, and show good verbal communication skills. Speaking with a smile in the voice, being enthusiastic, and having a cordial manner are essential skills that generate the framework for positive communication. Speaking with hostility or disinterest is sure to influence the client negatively and ensures that future communications, if they still exist, with clients will be more difficult (Fig. 10-1). Always remember that this is a service business.

TELECOMMUNICATIONS IN MASSAGE THERAPY

The term *telecommunications* refers to the science and technology of communication by electronic transmission of impulses, as by telegraphy, cable, telephone, radio, or television. In a practical sense, telecommunications in a massage office refers to the different kinds of telephone systems and communication that result from the use of the telephone lines. In this chapter, you will learn about the various types of telephone systems, such as key systems, cellular phones, hands-free telephones, conference calls, answering machines, and pagers. You will also learn how to manage communication using these systems.



FIGURE 10-1. A voice that makes the caller feel as though a smile is coming through the receiver is a winning voice. (From Finkbeiner BL, Finkbeiner CA: Practice Management for the Dental Team, ed 6, St. Louis, 2006, Mosby.)

Telephones

With the array of specialized telephone equipment now available, the massage therapist can take advantage of state-of-the-art equipment to become more efficient. For a modest price, massage business owners can buy sophisticated telephone systems that can improve the productivity and profitability of their enterprise. Telephone companies and agencies usually are very accommodating in helping businesses determine their needs for telephone equipment and in making recommendations. Various types of equipment can also be explored at product Web sites using search programs. The equipment and services discussed subsequently can be useful in the massage office.

Integrated business communication systems offer features designed for a small business such as a massage practice. A system such as the one shown in Figure 10-2A automatically redials the last outside number dialed at the touch of a button, easily establishes a three-way conference call with the conference button, and on most system phones, allows you to dial and talk without picking up the handset. It includes basic transfer and hold functions, as well as programming of multiple numbers to allow *speed dialing* of frequently called numbers. Information can be displayed in many languages, which is an important feature in the global community. An expanded version of this system (see Fig. 10-2B) enables you to enlarge the capacity of the model. A massage therapist may feel that only a basic, traditional telephone is required; however, a versatile telephone system with the features described allows more efficient handling of the many telephone calls received daily. This is especially important if you are in a single-person business, which is common for many massage professionals. Communications can be improved from one area of the office or clinic to another through the paging and intercom features. With single-button access, the person to be contacted can be reached quickly. Often, the individual can answer intercom calls without touching the phone or interrupting work.

Plug-in *voicemail* systems are fully integrated messaging systems residing on a plug-in circuit board that is used with the Partner Advanced Communications System. The system provides users in larger massage practices or clinics audio instructions on using personal speed dialing, conferencing, or group paging by dialing into the voicemail. It also offers callers a prompt connection to various departments or areas in a clinic and can record messages in the voicemail. This level of sophistication for telecommunication systems is not typical in the single-person massage practice, but with massage therapists working more often in multidisciplinary health care systems or large spas, it is important to understand how these systems function. It is common to have to communicate using these complex communication systems.

Personal computer (PC)-linked telecommunications systems let businesses manage incoming and outgoing calls,

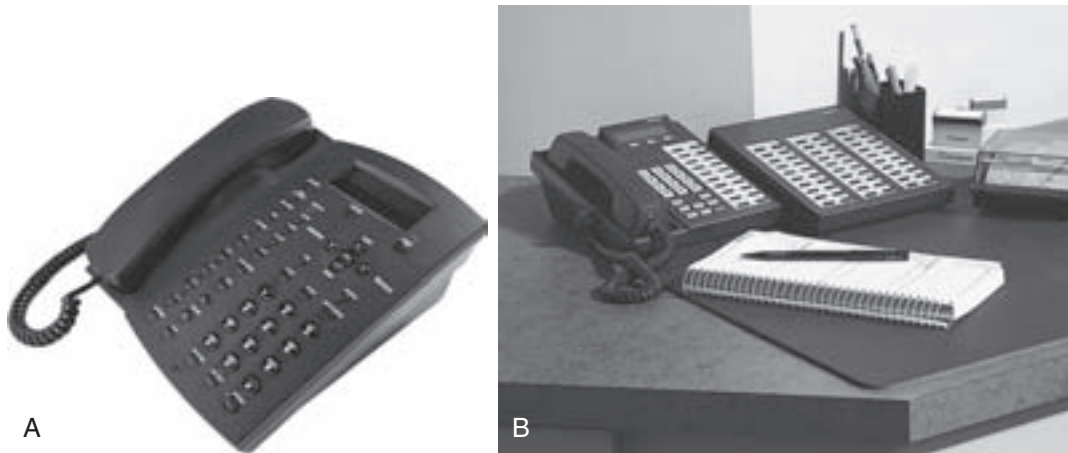


FIGURE 10-2. **A**, Basic, easy-to-use telephone systems for small businesses include features such as a built-in speakerphone for convenience and the ability to establish three-way conference calls. **B**, A larger model expands the capacity of a phone system. (From Finkbeiner BL, Finkbeiner CA: Practice Management for the Dental Team, ed 6, St. Louis, 2006, Mosby.)

organize personal information, and store client information (e.g., telephone numbers) in a database file that can be retrieved for autodialing. It also allows programming of phones from a PC (Fig. 10-3). With this type of computer-telephone integration, incoming calling information can be used to provide an automatic pop-up window on a PC that displays a caller's database file; this allows you to greet the caller by name and have detailed information readily available for answering questions. This system brings the efficiency and productivity of advanced telecommunications technology to small and medium-size businesses.

Cordless telephone systems provide an extended mobility range in the office (Fig. 10-4) and allow you to leave the base station and communicate with other areas without having to use answering machines or voicemail or play telephone tag. Be cautious when using a cordless phone that conversations are not overheard.

A cellular phone, or cell phone, is a portable communication device (Fig. 10-5). When a massage therapist needs to maintain contact with a central location while driving from one place to another, *cellular technology* makes it possible to use a fully functional telephone. This technology breaks down a large service area into smaller areas, called cells. Each cell is served by a low-powered receiver-transmitter. As the mobile caller moves from one cell to another, a switching office automatically moves the call in a corresponding fashion. The mobile telephone switching office communicates with a land-based subscriber to complete mobile calls to fixed locations serviced by telephone lines.

A hands-free telephone allows you to work on the computer, access records, or perform some other task while talking on the telephone. This time-saving device is becoming very popular in clinics and private massage offices. The concept of a hands-free system can be carried into other methods of communication, such as pagers and walkie-talkie types of systems (Fig. 10-6).



FIGURE 10-3. Telecommunications systems linked to personal computers provide rapid access to client data. (From Finkbeiner BL, Finkbeiner CA: Practice Management for the Dental Team, ed 6, St. Louis, 2006, Mosby.)

With these systems, it is never appropriate to take a call while giving a massage. In the rare situation, such as an emergency, when you must take a call, inform the client of the possibility before the massage.

SELECTING A TELEPHONE SYSTEM

Before selecting a system, examine the specifications carefully to determine the cost of the standard features and the cost of each of the optional features. Be sure to consider the cost of operating and maintaining the system.

TELEPHONE FEATURES

Telephones offer a multitude of features, from the very basic to the highly technical. The following paragraphs describe some of the basic features.

The massage therapist may find the hands-free *speakerphone* feature very convenient. With most systems, with a push of a button, the speaker's voice is picked up by a



FIGURE 10-4. Cordless phone systems allow extended mobility in the massage office. (2005 © Cora Purdy. Image from *BigStockPhoto.com*.)



FIGURE 10-5. Cellular phones allow massage therapists and staff members to communicate while outside of the massage office. Some advanced cellular models include additional features such as multimedia access or the ability to capture and send or receive digital images. (2005 © Cora Purdy. Image from *BigStockPhoto.com*)

microphone. Speakerphones are particularly valuable for group meetings.

Voicemail messaging, or phone mail, uses advanced recording and routing functions to combine the features of a telephone, a computer, and a recording device. This feature can be learned quickly and is simple to use. The only equipment needed is a touch-tone telephone.



FIGURE 10-6. A hands-free telephone system allows the administrator to perform other tasks while speaking on the telephone. (From Finkbeiner BL, Finkbeiner CA: *Practice Management for the Dental Team, ed 6, St. Louis, 2006, Mosby.*)

Massage office applications include voice-recorded daily updates of appointments available or unavoidable cancellations such as an emergency and directions to the massage office. Alternatives to voicemail include an answering machine or answering service. The stand-alone answering machine differs from voicemail in that it does not have the option of sending messages to various locations. However, callers can leave a message and receive information from the office.

An answering service with operator-answered calls can be used when clients call after office hours, on weekends, or on scheduled days off. The answering service operator informs the caller where the massage therapist can be reached or takes the information from the caller and then notifies the massage therapist. This type of service is seldom used in the massage practice but may be an option if the client base prefers talking to a person rather than electronic equipment. Regardless of whether a voicemail system or a separate automatic answering device is used, some basic courtesies must be observed:

- If an answering machine is used, turn it on before leaving the office.
- In the outgoing message, indicate that the caller has reached an answering system.
- Give clear information about office hours or ways to contact the massage therapist.
- Make sure the caller has adequate time to record a message.
- On returning to the office, check the calls on the voicemail or recorder.
- Take care of any necessary follow-up to the recorded calls. Most systems allow the user to access the answering machine or voice mailbox to receive messages even when offline.
- Update the outgoing messages regularly.
- Avoid nonprofessional messages that are distracting to the caller.

Many features are available on most phone systems:

Text messaging: Text messaging is quickly becoming an important feature for phone applications. It is a quick and efficient way to send and receive information.

Conference calls: If the massage therapist needs to talk to several people in various locations simultaneously, a *conference call* may be placed. The call is arranged through a conference call operator, who is given the names and telephone numbers of the individuals included in the call and the time the call should be made. With special equipment, several people can hear and participate in the call at each location. This feature is becoming invaluable because the ability to schedule face-to-face meetings is costly in terms of time and travel.

Caller ID: The *caller ID* feature can identify a caller before the telephone is answered by displaying the number of the telephone from which the person is calling. You may block your number from appearing by pressing a special key.

Call forwarding: A telephone call can be automatically forwarded to another telephone number with *call forwarding*.

Call holding: The *call holding* feature is frequently used in massage offices, which often receive calls in rapid succession. This feature allows you to answer a second call while the first caller holds on the line. Care should be taken to extend maximum courtesy to the caller asked to hold (Box 10-1).

Music on hold: The music on hold system provides the caller with music or a short narrative about treatment in the massage office while the person is on hold. The system can be personalized to address specific types of treatment in the office and then revert to music periodically. This feature tends to ease the caller's impatience and can offer short educational clips that may market certain aspects of the practice.

Automatic call back: A caller can give instructions to a busy station to call back as soon as the busy station is free.

Automatic call stacking: Calls that arrive at a busy station are automatically answered by a recorded wait message.

Speed dialing: Commonly called numbers can be stored in the telephone's memory, and the call can be made by keying in a one- or two-digit code. Speed dialing cuts down on the time spent dialing frequently called numbers.

Call restriction: Unauthorized long-distance telephone calls can be eliminated with this feature. If an individual is authorized to make a long-distance call, the call is given an authorization code that must be keyed into the telephone before the call can be processed. The telephone may also be programmed not to accept long-distance calls.

Identified ringing: This feature provides distinctive ringing tones for different categories of calls. For example, internal calls may have one long ring, whereas outside calls may have two short rings.

Multiple lines or key telephones: Multiple lines are a standard feature on most telephones in a larger massage business. Special care must be taken when using them to ensure privacy and to avoid interfering with other calls in progress.

If multiple lines are available for receiving or placing calls, one of the lines often is for a number that is not listed in the telephone directory or printed on the business stationery. This line should be used for outgoing calls, leaving the other lines available for incoming calls. A telephone system with multiple lines can be used for inside and outside calls. This can be a very efficient system, but you must remember several important things, which are represented in Box 10-2.

Pagers

A *pager* is a telecommunication device that allows a person to receive accurate messages instantly. The pager can receive numeric messages, including phone numbers and special codes you have devised, or alphanumeric messages. Most pagers, such as the one shown in Figure 10-7, are easy to read, have various alert tones, display the date and time, offer various-size message slots, and retain messages in memory.

Smartphones

A smartphone combines the functions of a cellular phone, a personal digital assistant (PDA), and a handheld computer in a single device (Fig. 10-8). These devices can do so much that they usually are underused because there is so much to learn. They often have a still and video camera, text and e-mail capability, and ability to store documents and music. They are able to enhance the office-on-the-go concept. From the user's point of view, carrying a single device that does everything on the road is much better than having to carry multiple devices and manage their synchronization. The BlackBerry and various smartphone technologies are wireless and allow the user to access mobile communication centers, reply to and forward voicemails, initiate conference calls, and access directories. Users can access e-mail, corporate data, and the Internet. New technology, such as

BOX 10-1 Using Call Holding

- Excuse yourself from the first caller before answering a second call.
- Greet the second caller with the standard office greeting.
- If the second caller requires only a short response, complete the call, and return to the first caller.
- If the second caller appears to need more extensive assistance, explain that you are on another call, ask the caller if he or she can wait, and place the call on hold. If the caller does not want to wait, ask where the person can be reached and say that you will return the call. Always return the call promptly.
- In returning to the first caller, always thank the person for waiting before proceeding with the conversation.

BOX 10-2 Using a Multiple-Line Telephone System

1. Determine which line to answer. It usually is indicated by a ring or buzz, and the button flashes until the line is answered. Depress that line's key before lifting the receiver.
2. If you are placing an outside call, determine which line is available (indicated by an unlighted button). Depress the key for that line, and dial the number. If you accidentally select a line that has been placed on hold, depress the hold key again to put the call back on hold.
3. If you place an incoming call on hold, tell the caller that you are doing so. Depress the hold key, which keeps the caller on the line (the hold key then returns to its normal position). The line key remains lighted, which indicates that the line is in use. Other calls then can be placed or received on another line.
4. Before transferring a call, be sure to inform the caller that you are doing so, because the person may not want the call transferred. Give the caller the extension number to which he or she is being transferred in case the call is disconnected. This allows the caller to call the person back directly. To transfer an outside call with the button system, you must first place the call on hold. Then push the button for local, which lights when in use (the local button is for in-office transfers only). Dial or buzz a number in the office telephone system; the telephone is answered on local in another office. Inform the massage therapist of a call on a particular line, and the massage therapist completes the call from that telephone. If you must return to the incoming line, remember which line your caller used. *Hold reminder* is a feature on advanced telephone systems that gives a reminder tone at various intervals to indicate that a caller is still waiting. Depress that button, which opens the line again and allows you to complete the call.

the smartphone, continues to develop and will revolutionize telecommunications.

Facsimile Communication System

Another electronic means of communication is the *facsimile (fax) machine* (Fig. 10-9). A fax machine is a scanning device that transmits an image of a document over standard telephone lines. The machine operates like a photocopier that sends an image by wire. At the receiving end, another fax machine receives the transmitted copy. The message may be a handwritten document (in ballpoint pen), a keyboarded page, or a picture. The cost of transmitting a fax message is the same as a telephone call because the message is transmitted through the telephone lines. Many offices prefer to have a dedicated telephone line for the fax machine rather than using the business telephone number.

A fax machine may be a stand-alone unit or may be incorporated into the office computer. The cost of the fax machine varies greatly, depending on added features.



FIGURE 10-7. A portable pager. (2005 © Carolina Smith. Image from BigStockPhoto.com.)



FIGURE 10-8. Smartphone technology is revolutionizing telecommunications. (2008 © Vitaliy Pakhnyushchyy. Image from BigStockPhoto.com.)

Calling Card Calls

Many people use calling cards. Calling cards allow calls that the person makes while traveling to be charged to the office. Key 0, the area code, and then the telephone number. When the operator answers and requests your calling card number, key in the number on your card.

Telephone Directories

The telephone directory is a vital tool in the business office. It is important that you look through it and become familiar with the type of information available so that you can use the directory as efficiently as possible. The telephone



FIGURE 10-9. Facsimile (fax) machine. (From Finkbeiner BL, Finkbeiner CA: Practice Management for the Dental Team, ed 6, St. Louis, 2006, Mosby.)

directory provides selected area codes for many cities in North America and foreign countries and an illustration of *time zones*. You also may find the following information:

1. A community profile
 - Past and present
 - Community events
 - Things to do and see
 - Parks and recreation
 - Colleges and universities
 - Transportation services
2. Maps
 - Overview of the city
 - Area maps
 - Maps of nearby communities
3. Zip codes
4. Senior citizen information

The front pages of the telephone directory provide important information, such as emergency phone numbers, including the police, fire, ambulance, suicide prevention, and poison control numbers. Page 1 of the front pages has a table of contents. Review this page so that you can quickly find other services listed in the directory.

The white pages of the telephone directory usually are divided into three sections: (1) the residence section, which is an alphabetical listing of the names, addresses, and telephone numbers of individuals; (2) the business white pages, which is an alphabetical listing of the names, addresses, and telephone numbers of businesses; and (3) the blue pages, a section that lists the names, addresses, and telephone numbers of local, state, and federal government offices. An 800 or 888 number allows an individual to call a business toll free. Companies that use this service are listed in the telephone directory with an 800 or 888 number. If you know a company has such a number, but it is not available in the

local directory, the information may be obtained by keying 1-800-555-1212. As with most information services, a fee may be charged for this service.

The yellow pages list the names of particular businesses according to the type of service the business provides. For example, assume you are interested in obtaining laundry service for the office, but you are not familiar with companies in your area that provide this service. The category can be broken down as follows:

Laundries
 Laundries—Self-service
 Laundry—Equipment—Commercial

The companies specializing in each area are listed alphabetically. Because this section is used as a sales tool, it has additional advertisements and a variety of print styles.

The classic telephone book is giving way to the directory being provided on the Web. In this format, search programs can be used to locate the information.

DEVELOPING EFFECTIVE TELEPHONE ETIQUETTE

Most people take great care to exude a professional business appearance, but few people take as much pride in developing their telephone image. People often forget when using the telephone that the person on the other end of the line is a human being.

You must take time to develop a professional telephone personality. To be effective on the telephone, you must keep a smile in your voice, answer calls promptly, be attentive and discreet, be cordial and responsive, ask questions tactfully, take messages courteously, speak distinctly, place calls properly, avoid sexism, and be considerate to the caller. The techniques for successful telephone contact, which involves a voice-to-voice relationship, are somewhat different from those of successful personal contact, which involves a face-to-face relationship (Fig. 10-10).

Your Speaking Voice

The speaking voice has four separate but interrelated components: loudness, pitch, rate, and quality.

Loudness refers to the volume of your voice. If you speak too loudly, the listener may be uncomfortable. Have you ever talked on the telephone with someone who spoke so loudly you had to hold the receiver away from your ear? If so, you know how unpleasant excessive volume is to the listener. The opposite situation can be equally unpleasant. If you lack confidence, your voice may be so quiet that people will ask you to repeat what you have said. If this happens, you should try to increase your confidence and your volume.

The rate of speaking can determine how well another person understands you. When discussing familiar procedures

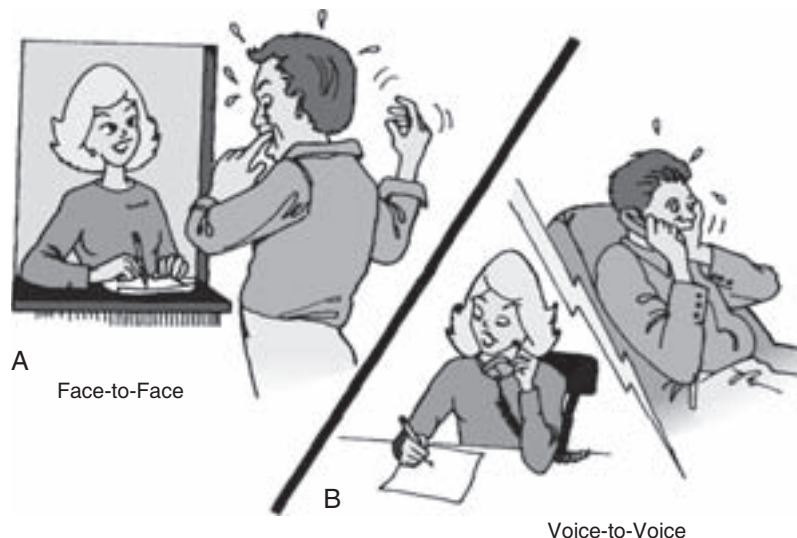


FIGURE 10-10. **A**, Face-to-face conversation. Nonverbal cues are apparent; a person smiles or gestures to make a point. Poise, interest, and sincerity provide observable feedback. Facial expressions help to indicate the degree of understanding. Discussion is extemporaneous, and notes typically are not used. **B**, Voice-to-voice conversation. The impression of the person is acquired only through hearing. Interpretation comes only from the tone of voice. The degree of understanding is determined by questioning and by rephrasing statements. Notes are advantageous in this situation. (Modified from Finkbeiner BL, Finkbeiner CA: Practice Management for the Dental Team, ed 6, St. Louis, 2006, Mosby.)

with a client, you may tend to speak rapidly, forgetting that this is new material to the client. There is no ideal rate, but a general rule is to speak at a rate that does not detract from the clarity of your message and that is easy and comfortable to listen to for an extended period.

Pitch is the tone of the voice. This is more difficult to change, because after it has been developed, persistent discipline is required to alter it. A low, gravelly voice or a high, squeaky voice may be unpleasant to listen to and is hard on your throat. Many exercises are available from the local telephone company and reference libraries for improving voice pitch.

The quality of your voice is a combination of physical and psychological factors. Changes in each of these alter the effectiveness of your speaking voice. Daily experiences affect this quality, and care should be taken to withhold depression, excitement, and anger from your voice when speaking on the telephone in a business setting.

To achieve a good telephone personality, you should develop the qualities of alertness, expressiveness, interest, naturalness, and distinctness. A client calling the massage office expects to have the call answered promptly. You should answer the phone within the first two rings. This is difficult if you are in a single-person business. This situation can be addressed with effective use of answering systems. Make sure that clients understand that an answering system is used and how often and when you return calls. Schedule enough time between appointments (minimum of 15 minutes) to return calls.

Everyone enjoys being recognized, and you should be attentive to the client's identity and express this in your voice. When a client calling the office identifies himself, you

reply, "Yes, Mr. Jones (or first name if appropriate), how may I help you?" Using first names is appropriate for regular clients if a first-name basis has been requested.

When talking on the phone, do not stammer and stutter and say, "Yeah, well, uh, I don't know." Such a response indicates to the client that you are inexperienced. If you do not know the answer to a question or want to investigate more before responding, say, "I will be glad to check" or "Let me gather more information and call you back within the next hour." This type of response indicates you have made a sincere effort to help and lets the client know you are willing to seek an answer if there is a problem. If you promise a client you will call back, do it at the time you promised. Offer to find an answer if you do not know; do not force the client to ask you to seek the information.

Nothing is more boring than listening to a person who speaks in a monotone. Put expression into what you say. Add enthusiasm to your voice by using natural voice inflections. To create a smile in your voice, place a mirror in front of the telephone. This ensures that you put a smile on your face before you answer the telephone. Try it; it works! Act enthusiastically, and you will feel enthusiastic.

Clients calling the massage office have a definite purpose and expect you to be interested in their issues. Give each client your undivided attention. Do not interrupt or become preoccupied with another matter. You can show interest in the client by asking appropriate questions and by not rushing to terminate the conversation.

To be natural, you must be yourself. Do not be a phony. An unnatural voice is easily detected. Keep the breathy "daaarhling," "sweetie," "honey," and "dear" words out of

your vocabulary. “Sugar and syrup” have no place in massage business communication, so keep them out of your voice. It is also inappropriate to use slang. Slang is an informal language consisting of words and expressions that are not considered appropriate for formal occasions. Slang is the use of informal words and expressions to describe an object or condition. Slang is vocabulary that is meant to be interpreted quickly but not necessarily literally, because slang words or terms are often a metaphor or an allegory. Slang changes from generation to generation and culture to culture, so it is confusing and often disrespectful.

To speak distinctly, you must pronounce each syllable of the word completely. When using a handheld telephone, speak directly into the transmitter, which should be about 1 inch from your lips. Do not chew gum, bite on a pencil, or cover your mouth with your hand; these actions create mumbled conversation and do not present a good image for the massage office. Some examples of what to say and what not to say include the following:

<i>Avoid</i>	<i>Say</i>
Bye-bye	Good-bye
Huh?	Idon otun derstand.
	Wouldy ouplea ser epeatt hat?
Uh-huh	Yes
	Ofc ourse
Yeah	Yes
	Certainly
Okay	Ia gree
	Yes



SELF-REFLECTION

How do I sound on the phone? When I talk on the phone with someone, what type of voice is most pleasant? What is most irritating? What are my bad phone habits? What are my best phone skills?

Creating a Good Image

In addition to achieving good voice qualities, you must be able to choose the word or phrase that best communicates the message and makes the best impression. In general, to promote better understanding, you should use short, simple, descriptive words that are appropriate to the situation. When using technical massage terms, names, numbers, formulas, or foreign words, the information should be given slowly and distinctly. Suggestions for identifying letters are presented in Box 10-3, and those for identifying numbers are given in Table 10-1.

BOX 10-3 Using Words to Identify Letters

The following words may be used to identify letters for a caller:

- A as in Alice
- B as in Boy
- C as in Charles
- D as in Dog
- E as in Edward
- F as in Frank
- G as in George
- H as in Hat
- I as in Ida
- J as in Jack
- K as in King
- L as in Lion
- M as in Mary
- N as in Nancy
- O as in Old
- P as in Peter
- Q as in Queen
- R as in Robert
- S as in Susan
- T as in Thomas
- U as in Union
- V as in Victory
- W as in William
- X as in X-ray
- Y as in Young
- Z as in Zero

TABLE 10-1 Pronouncing Numbers Clearly

NUMBER	SOUNDS LIKE	FORMATION OF THE SOUND
0	Zir-o	Well-sounded Z, short I, rolled R, long O
1	Wun	Strong W and N
2	Too	Strong T and OO
3	Th-r-ee	Single roll of the R, long EE
4	Fo-er	Long O, strong R
5	Fi-iv	I changes from long to short; strong V
6	Siks	Strong S and KS
7	Sev-en	Strong S and V, well-sounded EN
8	Ate	Long A, strong T
9	Ni-en	Strong N, well-sounded EN

A variety of words and phrases in the massage office can convey an unfavorable image to the client (Fig. 10-11). These are *red flag phrases*, and replacements are suggested that can create a more positive image (Table 10-2). Each time you speak on the telephone, think about what you are saying. Ask yourself if that is what you intended to say. Put yourself in the client’s position to decide whether you are communicating connotations that should be avoided.



FIGURE 10-11. Red flag words and phrases. (Modified from Finkbeiner BL, Finkbeiner CA: Practice Management for the Dental Team, ed 6, St. Louis, 2006, Mosby.)

Managing Incoming Calls

Although each call to and from the massage office presents a unique situation, most calls can be placed in specific categories, and certain conditions remain constant in each situation. As a result, you will be able to formulate certain questions and answers for each situation. Care should be exercised not to use these statements in a rote manner, but to incorporate the ideas into your own words and develop a technique that fulfills the philosophy of the massage business.

Examples of typical conversations can illustrate efficient management of the telephone in a massage office. Some suggestions for managing incoming calls are presented in Box10- 4.

Managing Outgoing Calls

As a business professional, you will be placing many outgoing calls. The following tips are helpful for making such calls:

1. Plan ahead. Be sure to have the telephone numbers written correctly. If you are calling a client, list the name with the telephone number; if you are calling another massage therapist's office or business, have that number written or easily accessible. Be sure to consult the telephone directory if you are in doubt about a correct telephone number. Names appear in the telephone directory in alphabetical order; however, some public services or governmental agencies may be listed differently. For

TABLE 10-2 Red Flag Phrases

RED FLAG WORD OR PHRASE	USE INSTEAD
Cancellation	Change in the schedule
Waiting room	Reception room
Thank you for calling (without use of name)	Thank you for calling, Mrs. Main.
Cost	Investment
Remind	Confirm
Hurt, pain	Uncomfortable, discomfort
Old client	Former client
Operatory	Treatment room
Cost, price, charge	Fee
Bill	Account
When would you like to come in?	Do you prefer mornings or afternoons?

BOX 10-4 Telephone Etiquette for Incoming Calls

- Answer promptly.
- Identify yourself and the business.
- Speak distinctly, clearly, and slowly.
- Avoid slang.
- Listen attentively; do not interrupt.
- Do not talk to anyone else while speaking on the phone.
- Speak directly into the transmitter.
- Excuse yourself if you must attend to another call.
- Thank the caller if the person is asked to hold.
- Let the caller hang up first.

example, state offices are listed under the state name first and then alphabetically according to office. County and city offices are listed by county or city name first and then alphabetically according to the office. Federal offices are listed under United States Government first and then alphabetically according to the office. Parochial and other private schools are listed alphabetically by the name of the school. Another source for obtaining the correct telephone number for most businesses is the business white pages or yellow pages directory. If you know the name of the business, you can check in the business white pages in alphabetical order. It is becoming common to look up phone numbers using the Internet instead of a paper phonebook.

2. If the telephone you are using is a lighted push-button system, make sure the line is free before you place your call (the light signals when the line is in use). As the telephone receiver is lifted, make sure you hear the dial tone before starting to dial (the word *dial* relates to the old rotary phone system).
3. When your call is answered, identify yourself: "Hello, Mr. Jones (or David if appropriate). This is Sandy, your massage therapist."

4. State your reason for calling. If you are changing a client's appointment, have another appointment time available. Indicate why the change is being made, because it may cause a disruption in plans, and the client may also have to adjust another appointment or work schedule. "I am returning your call concerning your request for an earlier appointment."
5. The person who placed the call should also terminate it. It is discourteous to hang up without an indication that the conversation is finished. End the conversation with a courteous "good-bye" and then replace the receiver gently.
6. If you reach a wrong number, apologize for the inconvenience, verify that you dialed the number correctly, and recheck the number before redialing.

Examples of common outgoing calls are given below:

The purpose: Confirmation of a client's appointment for the following day.

The call: When the client answers the telephone, identify yourself, and state the reason for calling: "Hello, Mrs. Thompson, this is Luke, your massage therapist." You may then continue with your message, stating it briefly and completely: "I would like to confirm (not *remind*) your appointment for tomorrow at 1:30 PM." When the client acknowledges it affirmatively, you may say, "We look forward to seeing you tomorrow at 1:30," and then conclude the call by saying, "Good-bye." Wait for the client to hang up.

Sometimes, clients state, "I won't be able to keep the appointment tomorrow, and I'll call you later for another one." Although this may be a legitimate statement and the client does plan to call you at a later date, you should pursue the conversation, because it may be a signal that there has been a lack of communication with the client. Instead of abruptly concluding the conversation, ask the client, "Would it be possible to reschedule your appointment for a week from today?" If the client continues to be noncommittal, say, "I don't understand." Is there a reason for not wanting to make an appointment now?" This usually brings the client to the point of explanation. "My daughter gave me the gift certificate for Mother's Day, and I really do not want a massage." What you do next depends on your policies and procedures, which were described in Chapter 2.

When placing a long-distance call to different time zones, the time difference must be kept in mind. The United States is divided into four time zones: Eastern, Central, Mountain, and Pacific (Fig. 10-12). For example, if it is 2 PM in Grand Rapids, Michigan (Eastern time zone), it is 1 PM in St. Louis, Missouri (Central time zone), 12 PM in Denver (Mountain time zone), and 11 AM in Los Angeles (Pacific time zone). Make sure you know what time it is where you are calling to avoid disturbing someone at an inconvenient time. If you reach an incorrect number when dialing long distance,



FIGURE 10-12. Timezon esi nt heU nitedSt ates. (From Young AP: Kinn's The Administrative Medical You, ed 5, St. Louis, 2003, WB Saunders.)

obtain the name of the city, the state, and the number you have reached, and immediately notify the operator of the error so that no charge will be made for the call.

Taking Telephone Messages

Be prepared for incoming calls by keeping a pencil and message pad handy. Obtaining the correct information on messages is of utmost importance. Repeat the message, spelling of names, and the telephone number if a return call is necessary. Take sufficient time to obtain the correct information for the message. Be sure to date the message, indicate the time it was taken. *Do not trust your memory. Write things down.* The message should always be signed by the person taking it in case questions arise later about the information. Forms similar to the one shown in Figure 10-13 may be ordered from most stationery suppliers.



LEARNING ACTIVITY

Pair with someone, and practice taking a message by writing it down. Switch roles. Then place all the messages in a bag, and each person should pull out a message and read it. Discuss how accurate each message is and how it can be improved.

Personal Telephone Calls

The telephone in the massage office is installed as a service to the massage clients and should be maintained as a business telephone. Staff members should refrain from using the telephone for personal calls, and only emergency calls should be made.



Good Stuff from the Government

THE INSTITUTE FOR TELECOMMUNICATION SCIENCES IS THE FUTURE OF TELECOMMUNICATIONS

The telecommunications and information technology planning function represents the highest-level system or network perspective of the Institute for Telecommunication Sciences (ITS). This work includes planning and analyzing existing, new, and proposed telecommunications and information technology systems, especially networks, to improve efficiency and enhance performance and reliability. ITS performs this work for wired and wireless applications. This encompasses work frequently referred to in industry as *systems engineering*. All phases of strategic and tactical planning are conducted in this area, as well as problem solving and implementation engineering. ITS engineers identify users' functional requirements and translate them into technical specifications. Telecommunication system designs, network services, and access technologies are analyzed, as well as information technologies, including Internet and Internet-related schemes.

TO _____
 DATE _____ TIME _____

WHILE YOU WERE OUT

M _____
 of _____

Phone No. _____

TELEPHONED	PLEASE CALL
WAS IN TO SEE YOU	WILL CALL BACK
WANTS TO SEE YOU	URGENT
RETURNED YOUR CALL	

Message _____

Operator _____

FIGURE 10-13. Message for m. (Courtesy of SYCOM, Madison, WI. In Finkbeiner BL, Finkbeiner CA: Practice Management for the Dental Team, ed 6, St. Louis, 2006, Mosby.)

SUMMARY

Telecommunications include the cell phone, smartphone, Internet, office phone, voicemail, answering system, e-mail, and facsimile. These are important forms of communicating

with your new and current clients. You can choose whatever works for you and your clients, including e-mail, telephone systems, and cell phone text messaging. An answering system or voicemail system is an important piece of communication equipment when you are unable to take a call, such as when giving a message.

Unlike the use of postcards, texting, or the Internet, use of telecommunication methods allows the tone of your voice to project your concern and enthusiastic attitude. Proper etiquette is important when speaking on the phone. You should document your messages or discussions, because this allows for smooth conversation and hinders future frustrations when talking with clients, insurance representatives, or other business personnel.

Bibliography

Fulton PJ: *General Office Procedures for Colleges*, ed 12, Cincinnati, OH, 2003, South-Western.
 Rader MH, Kurth LA: *Business Communication*, ed 2, Cincinnati, OH, 1994, South-Western.

Evolve Annotated Web Links

<http://evolve.elsevier.com/Fritz/business>
 Institute for Telecommunication Sciences: Telecommunications and information technology planning (http://www.its.bldrdoc.gov/pub/ntia-rpt/tpr/2007/telecommunications_and_information_technology_planning-07.pdf)

Workbook

1. List and briefly explain five qualities of a good telephone service.

2. Explain the management of the following calls:

- a. Laura Cochran calls the office and tells you she ran a marathon and her muscles are very sore. She needs to see the massage therapist right away.

- b. Mrs. Gross calls the office and states that she is new in town. She wants to make an appointment for her son, Jim, who uses a massage therapist along with a physical therapist.

- c. Mr. Hubbard calls and states that his daughter threw her back out when jumping on the trampoline. He asks, "What do I need to do?"

3. Replace the following statements with statements that would create a better image.

- a. "I'm sorry, the massage therapist is tied up with a client."

- b. "Johnny, would you like to come in now?"

- c. "Laura, the technique won't hurt much."

- d. "I'm sorry, the massage therapist is unwell."

4. Complete a message form using the following telephone conversation: Mr. Schultz from Pine Mutual Insurance Company calls the office and wants you to tell the massage therapist he will meet her at the Yacht Club at 4:30 PM today. If this is not agreeable, Mr. Schultz can be reached at 495.8272.

5. List and briefly define four telephone systems or services available for use in a massage office.

6. List and briefly describe various types of information that can be found in a telephone directory.

7. Locate telephone numbers for each of the following. Keyboard the names and telephone numbers in tabular format on a Rolodex-type form provided in the classroom or the office of employment.

- Internal Revenue Service
- Police Department
- U.S. Post Office
- State Employment Commission

8. Using the Yellow Pages, locate one company and telephone number for each of the following. Type the information on a Rolodex form provided in the classroom or the office of employment.

- Massage supply company
- Cleaning service
- Computer repair service

APPOINTMENT MANAGEMENT SYSTEMS

OUTLINE

Appointment Management System

Selection of a Traditional Appointment Book
Options for the Electronic Appointment Book
Designing the Appointment Book Matrix

Important Factors in Scheduling Appointments

Massage Therapist's Biologic Clock
Scheduling for Productivity
Business Hours
Management of Prime Time
Habitually Late Clients
Standing Appointments

Client Who Arrives on the Wrong Day

Drop-Ins
Broken Appointments
Dovetailing
Establishing an Appointment Time

Entering Appointments

Appointment Book
Appointment Card

Daily Appointment Schedule

Summary

KEY TERMS

Appointment book
 Appointment book matrix
 Appointment call list

Appointment card
 Buffer period
 Daily appointment schedule

Dovetailing
 Prime time
 Unit

LEARNING OUTCOMES

Mastery of the content in this chapter will enable the reader to:

- Define glossary terms
- Describe appointment book styles
- Describe appointment software options
- Complete an appointment matrix
- Identify solutions to common appointment scheduling problems
- Make an appointment entry
- Design an appointment schedule list
- Identify common appointment book symbols
- Describe the use of a treatment plan
- Complete an appointment card
- Complete a daily schedule
- Describe a call list
- Explain advanced-function appointment scheduling

ⓔ Guidelines for the Learning Activities and answers to the Workbook questions are located on Evolve at <http://evolve.elsevier.com/Fritz/business>.

APPOINTMENT MANAGEMENT SYSTEM

The appointment management system can take the form of a traditional *appointment book* or software installed in the business computer. Some think that electronic appointment scheduling is time consuming and that it makes checking future schedules difficult. This is not true. Box 11-1 lists the advantages of an electronic appointment book. The traditional appointment book is discussed in this text because it is often used by the massage therapist practicing in a small business setting.

You will be able to use an electronic appointment management system once you activate the CD in this text.

The appointment system, which contains lists of all the scheduled clients and events for the massage therapist and staff, is the control center of the business and an important factor in the success or failure of a massage practice. Basic scheduling concepts (Box 11-2) are the same regardless of the type of system used. Only the process of data entry is different.

The massage therapist should analyze his or her business practice and determine an organized system of appointment control that (1) maximizes productivity, (2) reduces staff tension, and (3) maintains concern for the clients' needs.

BOX 11-1 Advantages of an Electronic Appointment System

- Treatment rooms can be color coded.
- Production goals can aid appointment scheduling.
- Production data are visible daily.
- Data entries are easier to read.
- Autoscheduling eliminates paging through the book.
- Various screen-viewing modes are available.
- Cross-referencing saves time and motion.
- Client data are more likely to be accurate.
- Searching for appropriate appointment openings is easier.
- Procedures can be posted to several different records from one screen.
- Client follow-up is easier.
- No manual record filing is necessary.

BOX 11-2 Tips for Efficient Appointment Management

1. Put one person in charge of the appointment system.
2. In a traditional appointment book, make accurate, neat entries.
3. Accommodate the client as much as possible, but maintain control of the appointment schedule.
4. Establish guidelines for problem situations.
5. Make sure the practice is controlled through the appointment system, not by it.

If you practice massage in a large massage clinic, medical facility, chiropractic office, spa, or sport and fitness center, there may be a receptionist who manages the appointment process. If problems with scheduling occur, it may be necessary to review the skills of the receptionist and the type of system used.

Electronic and traditional systems are addressed in this chapter. The concepts presented can be used in an electronic or a manual system because they are the same for both.

Selection of a Traditional Appointment Book

When an appointment book is used, the size and design of the book are determined by the needs of the massage practice. You should review the available styles to determine what is best for the business. Time and motion studies have indicated that the most efficient format for an appointment book is the week-at-a-glance style, in which all days of the week can be seen at one time; this allows you to observe openings in the schedule quickly (Fig. 11-1).

The binding on the appointment book may have three to nine rings or may be spiral. Spiral-bound books appear to withstand a greater amount of use. The books may be printed with or without dates and may have one or more columns (Fig. 11-2).

The individual days are divided into time increments. Some books provide 30-minute increments, others 10- or 15-minute increments. The smallest time increment is referred to as a *unit* (u). Typical massage appointments are 30, 45, 60, and 90 minutes. The 30-minute unit is the most logical for massage scheduling. Fifteen-minute units are also used in the massage practice, especially when the massage therapist works in the health care area and health care insurance is billed for services.



SELF-REFLECTION

What is the best appointment schedule for my style of massage and stamina? How much time do I need between massage sessions to change over the room, take care of restroom needs, and perform other tasks? What if I am working for a business that schedules 60-minute appointments one right after the other? Will that work for me? How will I manage back-to-back 30-minute sessions? What is different about how I would schedule myself from scheduling done by an employer?

Options for the Electronic Appointment Book

With the electronic appointment system, appointments can be entered, canceled, rescheduled, and moved easily with one keystroke. The benefits of the electronic system (see Box 11-1) set it apart from the traditional system. Common

electronic software scheduling packages usually have a number of components:

Goal scheduler: This component takes into consideration fixed and variable overhead and the massage therapist’s preset goals for the year. In this system, a goal builder window indicates last year’s goal and actual production for the same period last year. It then indicates this year’s status.

Autoscheduler: This feature allows you to find an opening in a matter of seconds, and information can be viewed in several formats. The daily appointment screen with a find

window allows you to find a date and time for a client with minimal keystrokes.

Daily appointment screen: Most systems allow you to color code rooms. The daily appointment screen usually has two viewing modes. The regular view generally shows the treatment rooms in a column format with the client’s name. This is helpful when several practitioners are working at the same time in the office. The expanded view on the enclosed CD (Fig. 11-3) shows details for a full week, including the weekend. The find option brings up a calendar and lets you go directly to any specified day or zoom out to the weekly or monthly screen (Fig.11-4).

Client record: The client information screen (Fig. 11-5) in most systems can be divided into different categories, such as demographics, financial data, insurance, recall, and appointments. Client information that can be entered on this record includes the client’s complete name, marital status, gender, age, date of birth, work and home phone numbers, current balance, referrals, medical alerts, and appointment time preferences. Other information can be stored in other dialog boxes, such as session, SOAP notes, billing, and insurance billing screen.



FIGURE 11-1. Week-at-a-glance appointment book in various sizes. (Courtesy of SYCOM, Madison, WI. In Finkbeiner BL, Finkbeiner CA: Practice Management for the Dental Team, ed 6, St. Louis, 2006, Mosby.)

Designing the Appointment Book Matrix

An *appointment book matrix*, or outline of the appointment book, functions like the matrix of an amalgam restoration; it provides support. It is the framework around which appointments are made. A matrix should be completed before a new appointment book or electronic system is used. It should include the following elements:

Holidays: In many traditional books, holidays are noted by the manufacturer (Fig. 11-6A). However, you may find it necessary to enter special holidays observed in your locale

Month 20—

Monday	Tuesday	Wednesday
10	10	10
20	20	20
30	30	30
40	40	40
50	50	50
10	10	10
20	20	20
30	30	30
40	40	40
50	50	50
10	10	10
20	20	20
30	30	30
40	40	40
50	50	50
10	10	10
20	20	20
30	30	30
40	40	40
50	50	50
10	10	10
20	20	20
30	30	30
40	40	40
50	50	50
10	10	10
20	20	20
30	30	30
40	40	40
50	50	50
10	10	10
20	20	20
30	30	30
40	40	40
50	50	50

FIGURE 11-2. Undated multiple-column appointment book. (Courtesy of SYCOM, Madison, WI. In Finkbeiner BL, Finkbeiner CA: Practice Management for the Dental Team, ed 6, St. Louis, 2006, Mosby.)

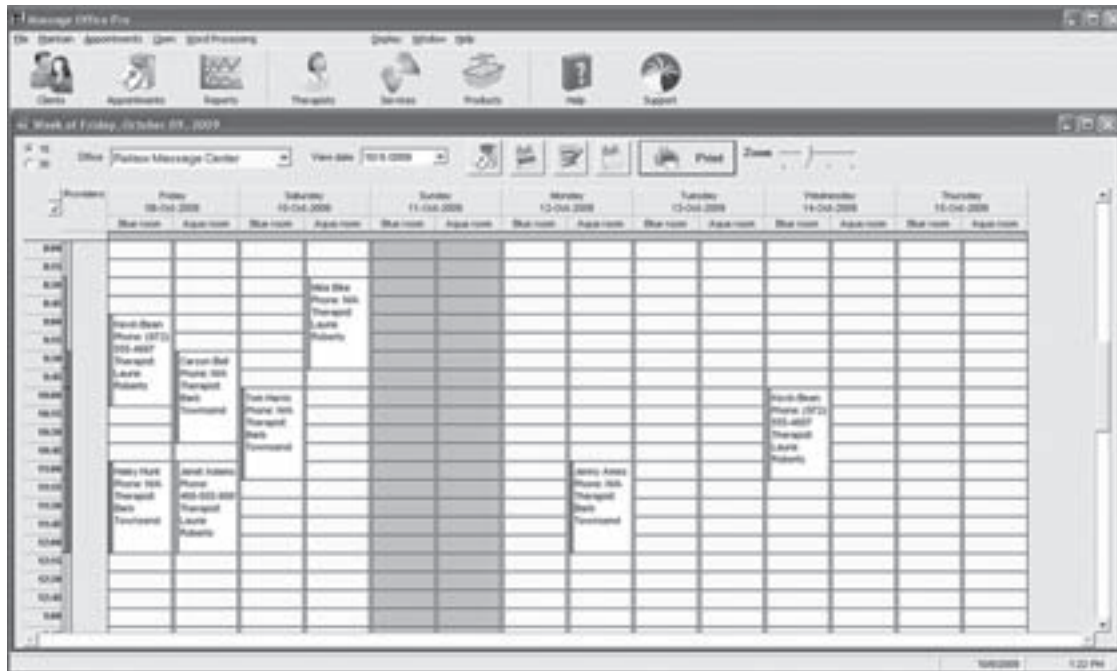


FIGURE 11-3. Daily appointment screen (expanded view). (Courtesy of Island Software)

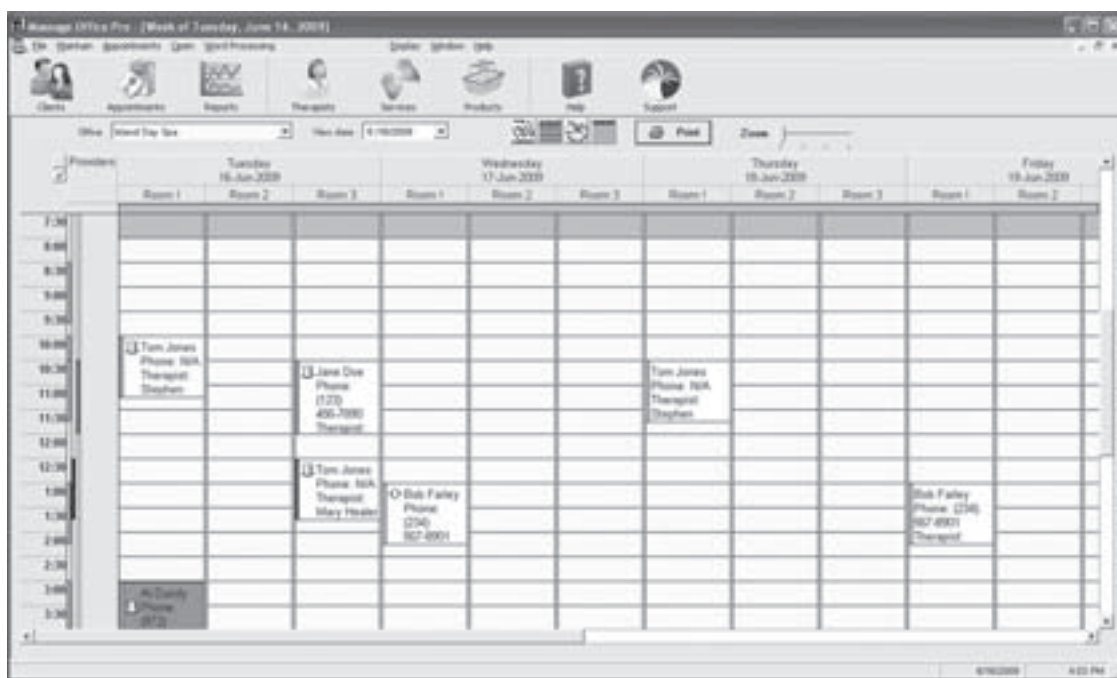


FIGURE 11-4. Quick-glance screen showing a week at a glance. (Courtesy of Island Software.)

or business. This can be done by placing an X across the entire day and marking it with the name of the holiday (see Fig. 11- 6B).

Lunch hours: Lines may be used to cross out lunch hours. However, a broad, yellow felt-tip marker accomplishes the same task and can be written over legibly (Fig. 11-7). After you become experienced with the appointment book, it will be unnecessary to mark off these hours.

Buffer periods: A *buffer period* is a small amount of time set aside to absorb the hectic workload of the day. Typically, 1-unit increment of time (a 15-minute unit is typical for a massage practice) is set aside in the morning and again in the afternoon. If this space is colored in with a yellow felt-tip pen, an entry can be made without erasing (Fig. 11-8). The buffer period should not be inserted during the busiest periods of the day. If you are a sole

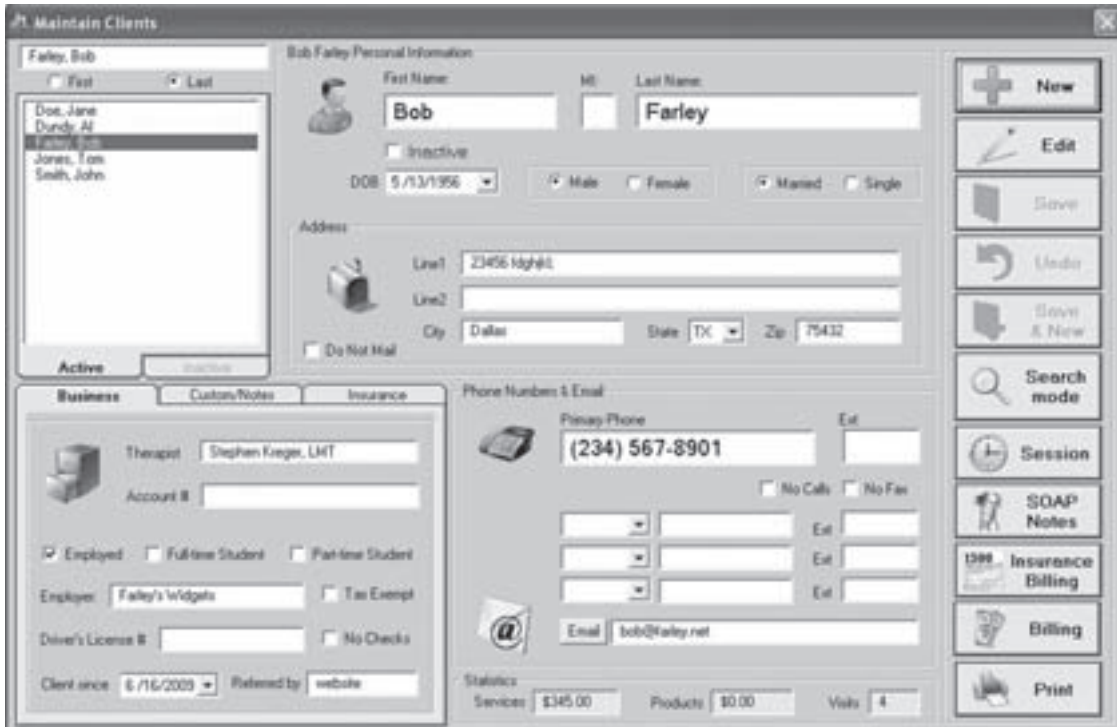


FIGURE 11-5. Client information screen. (Courtesy of Island Software.)

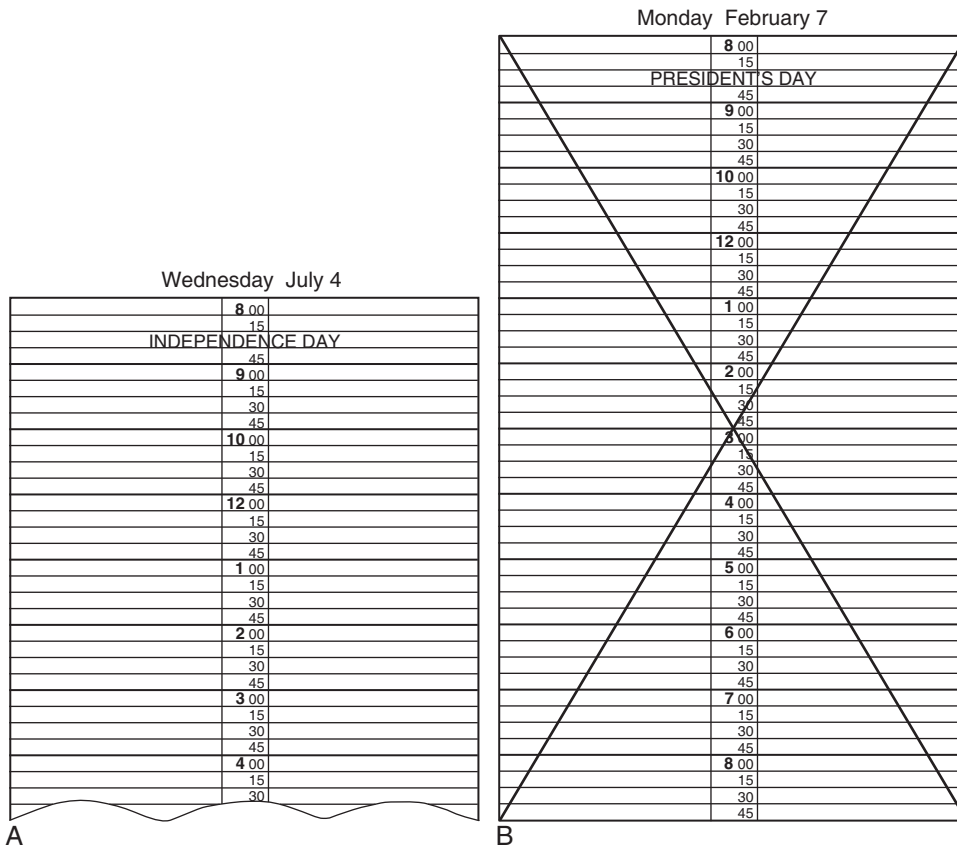


FIGURE 11-6. A, Holiday page from a traditional appointment book. B, An X drawn through a page from an appointment book to indicate a holiday or business closure. (From Finkbeiner BL, Finkbeiner CA: Practice Management for the Dental Team, ed 6, St. Louis, 2006, Mosby.)

	11 00	
	15	
	30	
	45	
LIONS CLUB	12 00	
AT	15	
UNIVERSITY CLUB	30	
Rm. 1005	45	
	1 00	
	15	
	30	
	45	

FIGURE 11-7. Lunch hour highlighted in a traditional appointment book with a felt-tip marker. (From Finkbeiner BL, Finkbeiner CA: Practice Management for the Dental Team, ed 6, St. Louis, 2006, Mosby.)

practitioner and managing your own schedule, a buffer system of a 15-minute period twice daily and at least one 30-minute period is recommended. It is also necessary to provide adequate buffer periods between client sessions. Fifteen minutes between appointments is necessary to clean and again set-up the massage area. In addition to providing a massage for the client, you must perform all business responsibilities, cleaning, laundry, and other miscellaneous activities required when operating a successful business practice.

Tuesday, April 24	
8	
15	
30	
45	
9	
15	
30	
45	
10	
15	
30	
45	
11	
15	
30	
45	JOHN FLETCHER FR #8
12	
15	
30	
45	
1	
15	
30	
45	
2	
15	
30	
45	
3	
15	
30	

FIGURE 11-8. One-unit buffer highlighted in a traditional appointment book with a felt-tip marker. (From Finkbeiner BL, Finkbeiner CA: Practice Management for the Dental Team, ed 6, St. Louis, 2006, Mosby.)



LEARNING ACTIVITY

Create a sample appointment book matrix using the following guidelines.

Professional meetings: A notation about the location and nature of the meeting can be made on the appropriate date, with an X blocking out the specified time (Fig. 11-9).

Staff meetings: Time should be set aside regularly, usually once or twice each month, for all members of the staff to meet and discuss goals for the business. This time should not be scheduled during the lunch period or after business hours; it should be integrated into regular business hours (see Chapter 2 for suggestions on scheduling staff meetings).

12	LAKE MICHIGAN DISTRICT
15	MESSAGE
30	SPEAKER: DWAYNE RIGG D.D.S
45	PRACTICE ADMINISTRATION
1	GRAND HAVEN 12-5
15	YACHT CLUB LUNCH
30	
45	
2	
15	
30	
45	
3	
15	
30	
45	
4	
15	
30	
45	
5	
15	
30	
45	

FIGURE 11-9. Time for a meeting is indicated with an X. (Modified from Finkbeiner BL, Finkbeiner CA: Practice Management for the Dental Team, ed 6, St. Louis, 2006, Mosby.)

IMPORTANT FACTORS IN SCHEDULING APPOINTMENTS

You will deal with a variety of situations in scheduling appointments. Management of the appointment book requires a well-defined plan, an established appointment sequence, and an ability to maintain strict control over the appointment book while still meeting the needs of clients.

Massage Therapist’s Biologic Clock

Some people are early birds, and others are night owls. It is important to understand your body rhythms to best use your time. Not all people are at their best at all times of the

day. Some people do not reach their peak period until 1 or 2 PM, when the early birds who were dynamic at 8 AM have begun to lose energy. Others work best in the evening. This becomes an important factor in determining when to schedule the client. Because massage is a service business, you also need to consider when clients are available for massage sessions. The massage schedule can begin as early as 6 AM and continue well into the evening, depending on when clients are available and how their needs fit with your schedule.

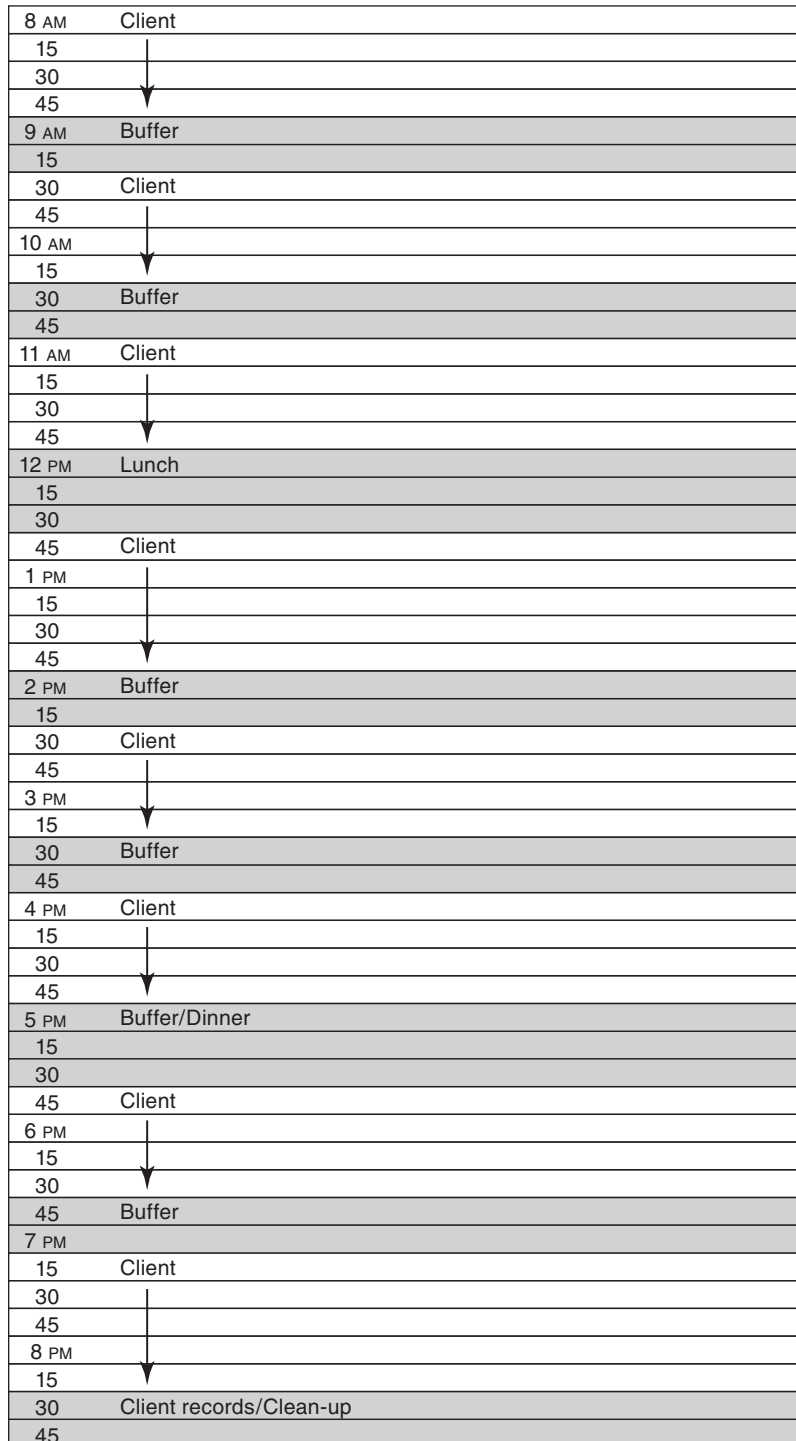
Scheduling for Productivity

Massage therapy is a business, and one of the most effective ways to be profitable is to increase productivity. This is a real concern because massage is very time intensive. Overlapping

booking is not possible as it is with spa treatments or medical service; there is a limit on the number of clients one massage therapist can work with in a day. If your body mechanics are effective, you should be able to schedule five massage sessions per day and maintain basic business procedures. A full-time practice for a single massage therapist requires a minimum of 50 scheduled business hours per week, including massage sessions, buffer periods, facility management (e.g., cleaning),

various marketing activities, business activities (e.g., paying bills, billing clients, ordering supplies, returning calls). A typical day begins at 7 AM. Standard massage sessions of 60 minutes are scheduled as shown in the figure below.

An alternative is to begin the business day later and work later into the evening. This type of scheduling works for those practicing massage in an office setting where clients come to them. The buffer time allows for the massage



therapist to manage office tasks, clean and setup massage area, collect fees, make the next appointment for the client, and be available to greet the next client. It also allows for a longer appointment for those that may want a 90-minute session and enough time to accommodate the quick turnover required of the 30-minute sessions.



SELF-REFLECTION

How does my biologic clock influence my workday? What time of day is my down time or up time? How do I set my schedule to best support my inner clock? What happens when I get off my schedule or have to work on a schedule that does not match my biologic clock?

If you are practicing in a setting where you do not have to manage the office (i.e., as an employee in a business with a receptionist), you will need less buffer time. Instead, you will likely be scheduled with two break periods and a lunch or dinner period. You will be expected to stay on schedule so that clients do not have to wait. Sessions are usually scheduled at 30 minutes or 50 minutes, and you must be able to effectively prepare the massage area, wash your hands and arms, and greet the next client.

Business Hours

Most massage businesses develop a schedule that includes extended business hours beyond the traditional workday. They may include early morning, evening time, or weekend days. There is no significant difference in scheduling appointments for this type of practice, but it requires special attention in the selection of an appointment book and in designing the matrix. Care should be taken that the days identified for extended hours include times to cover all the hours the business will be open. This situation may require an unmarked appointment book that allows you to insert the days and times in accordance with the business schedule.

Management of Prime Time

Prime time is the period most often requested by clients; in most businesses, it is the time after 3 PM. Not all who request this time will receive it, and clients must be informed of the need to schedule this time on a rotating basis.

Habitually Late Clients

A small number of clients persist in being late for their appointments. You should stress the importance of being on time for the appointment by explaining, “Mr. Campbell, your massage sessions require all the time allotted, and being on time for your appointment is therefore important to you.” Your office policy should address the ramifications of late clients.

Standing Appointments

Because massage is a retention-client business and massage is most beneficial if received regularly, the goal is to have client book standing appointments. This can be on a weekly basis, every other week, or monthly. Occasionally, a client wants two sessions each week. Because massage therapy is paid for by the client (no insurance coverage), the amount of financial resources that can be allocated to massage on a monthly basis must be considered when setting a standing appointment schedule.

Standing appointments should be encouraged and can account for three fourths of the practice. Based on 20 clients each week, this means that 15 sessions would be standing appointments. The most common pattern is an appointment every other week or twice each month. This schedule is most affordable for the most out-of-pocket payers. It is realistic to expect that of the 15 standing appointments, 10 would be of this type. This combination would be 20 different clients: 10 appointments one week and 10 appointments the alternate week. Five weekly standing appointment massage clients is a reasonable business expectation. Some clients will get a massage regularly on a monthly basis. You can expect that five clients per week will be of this type and account for 20 individual sessions. On a weekly basis the standing appointment schedule would look something like this:

Five weekly standing appointments = 5 clients

Ten every-other-week (bimonthly) standing appointments = 20 clients

Five monthly standing appointments = 20 clients

Five appointments open for new clients or special circumstances

If you analyze this, you can see that a full-time massage practice consists of 45 clients who have some sort of standing appointment and another group of 25 to 30 clients who get a massage occasionally. For the sake of profitability and productivity, the massage therapist should foster the standing appointment system.

Clients Who Arrive on the Wrong Day

Clients may arrive on the wrong day or at the wrong time. The error may be the client’s, or you might have written the wrong date on the appointment card. You should ask to see the appointment card, and if the client has made the mistake, indicate the actual date and time of the appointment. If you or another staff member made the error, an apology is necessary, and the client should be seen by the massage therapist if at all possible. The built-in buffer system in the daily schedule should make this possible. You may be able to contact the scheduled clients, explain that an “unexpected change has occurred in the schedule,” and delay their arrival. Regardless of who is responsible for the error, you should remain tactful and helpful in correcting the mistake.

Drop-Ins

Nothing is more frustrating than to have a client drop by the business and say, “I was just in the area and thought I’d drop in and see I could get a massage.” If one of the open (nonstanding) appointments is available, the individual can be seen. Otherwise, tactfully inform the client that you see clients by appointment only, and tell the person when the next appointment is available.

This practice does not apply to the many walk-in (convenience) massage clinics established in the past few years. One of the prime objectives of these clinics is to accommodate clients without appointments.

Broken Appointments

Sometimes, a client absolutely must cancel an appointment or is prevented from keeping the appointment by some unforeseen circumstance. Most clients respect the massage therapist’s time, and the massage therapist should be understanding when a cancellation occurs. Other clients, unfortunately, seem always to find an excuse for breaking an appointment. Although most massage therapists’ initial reaction is to charge for broken appointments, this becomes difficult to accomplish and results in poor public relations. The client should be informed of the importance of keeping the appointment; for example, “Mrs. Ward (or Shawna), because you have been unable to keep your massage appointment on a regular basis, I can no longer justify keeping you as a standing-appointment client. I do have a few appointments available every week that I reserve for those who cannot commit to a standing appointment schedule. This may be a better option for you.”

If the client continues to cancel appointments, she should be told, “I am unable to continue to make appointments for you because of the ongoing cancellations. I have only a few open sessions, and I have people who would like to schedule a massage with me.” However, such a policy should be exercised only after all other options have been explored by the massage therapist and client. Therapeutic massage is such a personal business that a disgruntled person can create a lot of negative word of mouth. Just as important, you have to invest your time in clients who are able to meet your business goals, and because there are limits on the number of

clients an individual massage therapist can see, it is important that each client is reliable.

Dovetailing

Dovetailing means working a second client into the schedule during another scheduled client’s treatment. Many health care professionals and some service professionals (e.g., cosmetologists) can accomplish this. Massage therapists should not attempt this type of scheduling.

Establishing an Appointment Time

To prevent conflicts with clients over appointment times, do not ask, “What is the most convenient time for you?” or “What is your day off?” or “When does Frank get out of school?” It is wiser to ask, “Is morning or afternoon better for you?” and then present two choices for the client. You will lead the client into making a choice realistically within your schedule, and you will not be forced to say “I’m sorry” to each of the client’s suggestions. Encourage clients who understand that massage therapy is the type of health care service that achieves the best benefits with regularly scheduled care. Massage is best at prevention, and prevention is an ongoing process. When clients ask, “How often should I get a massage?” explain the importance of preventative care, and suggest a standing appointment for every week or every other week. Explain that the every-other-week appointments can be effective if clients also do some self-help and that monthly appointments can be supportive if they are willing to do a lot of self-help work on their own. The analogy of housekeeping or car maintenance often helps clients understand the importance of regular massage appointments. After educating the client about the importance of regular massage, explain, “I have a limited number of appointments available each week. It is best if we schedule a standing appointment. I have Tuesdays at 4:30 PM, Saturdays at 11:00 AM available for weekly sessions, and Mondays at 8:00 PM is available for every other week. Will any of these times work for you?”

ENTERING APPOINTMENTS

Appointment Book

An entry in the appointment book must be made in pencil. It must be accurate, complete, and legible, and it should include the information shown in Box 11-3.

Because of the limited amount of space available for each entry, symbols must be used to make special notations about a client. Table 11-1 lists several symbols commonly used in the appointment book. Each entry was made in pencil and is accurate, complete, and legible. An appointment sequence is established in coordination with the treatment plan.



SELF-REFLECTION

Do I arrive late for appointments? Have I cancelled an appointment at the last minute or been a no-show? Will I show up on time for client’s appointments, or do I have a tendency to be late, cancel, or be a no-show? How would this type of behavior influence client satisfaction and retention?

BOX 11-3 Information to Include in an Appointment Book Entry

- Client's full name, with cross-reference in case of duplication of names
- Home and business phone numbers to confirm the appointment or to reach the client in case of an emergency
- Type of massage, if appropriate
- Length of the appointment, indicated with an arrow
- Special notations (e. g., new client)

TABLE 11-1 Symbols for Traditional Appointment Book Entries

SYMBOL	MEANING
N	New client
*	Client prefers an earlier appointment.
B	Business phone number
H	Home phone number
↓	Length of appointment

Appointment Card

An *appointment card* is a written notification of the client's appointment that the client takes home. After the entry has been made in the appointment book, the information is transferred to the appointment card. It is entered directly from the appointment book in ink and should be easy to read. Recheck the appointment card before giving it to the client to make sure the information in the book and on the card is the same.

A traditional appointment card is made of medium-weight or lightweight stock and measures about 2 by 3.5 inches to fit easily into a wallet. Appointment cards usually are white with black print. However, many businesses are color coding cards, using matching or contrasting ink to carry out a color theme in the business. The information on the card includes the massage therapist's full name, credential initials, address, and phone number, and the business policy on broken appointments. Lines are provided for the client's name and the day, date, and time of the appointment. Figure 11-10 shows a variety of appointment cards that can be used in the massage business. The cards shown in parts A and B of the figure are for only one appointment; the card shown in part C is a series-type appointment card, on which more than one appointment can be listed. The series card saves your time and the cost of additional cards.

In an electronic system, the appointment often is listed on the exit receipt. It also can be listed on a walk-out statement, but many clients seem to like the security of a separate appointment card. The electronic system does eliminate the potential for error in writing on the appointment card.

Clients who schedule standing appointments tend to get in the habit and seldom cancel appointments. There will be times when their schedule may change, such as around the

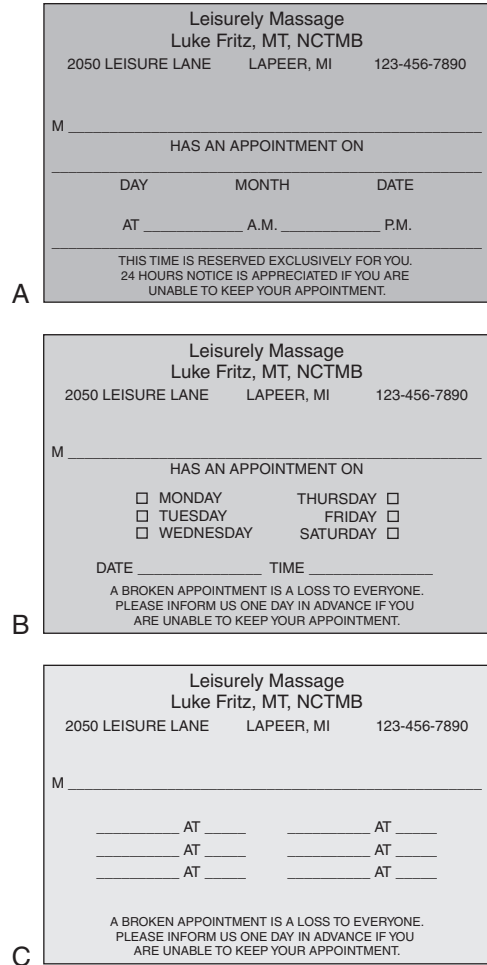


FIGURE 11-10. Appointment cards. A and B, Single appointment cards. C, Series-style appointment card. (Modified from Finkbeiner BL, Finkbeiner CA: Practice Management for the Dental Team, ed 6, St. Louis, 2006, Mosby.)

holidays or vacation or some sort of unexpected obligation, and the massage therapist should be tolerant of these occasional changes. The benefits of regular standing clients far outweigh some scheduling changes.

DAILY APPOINTMENT SCHEDULE

Each day, you should pull the clinical records for each of the next day's clients and complete a daily schedule. The *daily appointment schedule* is a chronologic listing of the day's activities. If there are openings in the daily schedule, you can attempt to fill the appointment from an appointment call list.

The *appointment call list* is a current list of clients who would like an appointment but do not have a standing appointment or who would like to change appointments on a particular day. The list can include potential new clients that have previously requested an appointment but none was available. The client's name, phone number,

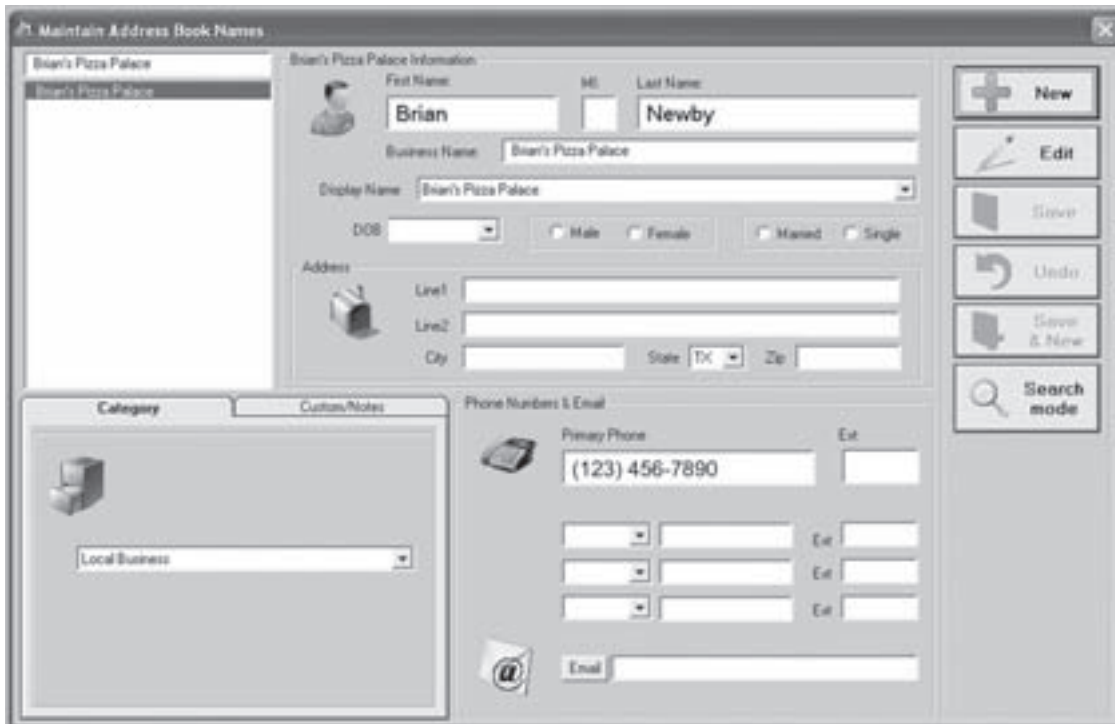


FIGURE 11-11. Electronic address book. (Courtesy of Island Software.)

and information are listed in a notebook or at the back of the appointment book, or this data may be entered in the address book of the practice management software (Fig. 11-11). These individuals can be called in an attempt to fill the daily appointment schedule if an opening occurs.

After you have become familiar with the techniques of appointment book management, it can be a very enjoyable part of the business. Using time efficiently can make each day in the business more productive and can reduce tension while still meeting the clients' needs. If the rules in Box 11-2 are followed, the massage business can maintain efficiency.



Good Stuff from the Government

OFFICE OF SMALL BUSINESS DEVELOPMENT CENTERS: ENTREPRENEURIAL DEVELOPMENT PROGRAM


The Office of Small Business Development Centers (SBDCs) provides management assistance to current and prospective small business owners. SBDCs offer one-stop assistance to individuals and small businesses by providing a wide variety of information and guidance in central and easily accessible branch locations. The program is a cooperative effort of the private sector, the educational community, and federal, state, and local governments. It is an integral component of the Entrepreneurial Development program's network of training and counseling services.

SUMMARY

Scheduling and handling appointment mishaps are important parts of a massage business. Success depends on knowing how to use the appointment book or computer software program. Whether you use two or more buffers throughout the day within your practice, you need to know who is coming in next to know how to prepare. Being prepared helps the flow of the day and keeps appointments on time, which your clients will appreciate. Use the appointment cards to help your clients remember their scheduled times, and use a reminder system for those who need a reminder the day before an appointment.

Your business hours may depend on your biologic clock or the time your clients are available. When are most of your standing appointments, or what is the most popular time for drop-ins? Many service industries, such as cosmetology and medical practices, use dovetailing, which does not work for massage therapy. Our business must dedicate a time slot for just one client. If using a receptionist, a client can come in early to complete paperwork and perform some of the tasks that would require a buffer slot in a single massage practice.

Keep an appointment call list for those waiting for a time slot for massage to help your business to continually grow. Try to be flexible with your open time slots for consistent clients who have unexpected disruptions.

 Now is the time to watch the tutorial on the enclosed CD at the back of the book on how to use the

software. Activate the CD, and begin the tutorial, which is a very detailed step-by-step instruction on how to maximize the use of the practice management software. After the tutorial, use yourself as your first client, set up your first people management page, then set up your first massage appointment. Complete the intake forms. Pretend you had your first massage, fill out the SOAP notes, and then book yourself for a recurring appointment every 2 weeks.

Bibliography

Schumann TC: Top five opportunities to improve your profit, *J Mich Dent Assoc* 87(issue 2):20, February, 2005.

Evolve Annotated Web Links

<http://evolve.elsevier.com/Fritz/business>

U.S. Small Business Association, Office of Small Business Development Centers: Entrepreneurial Development (<http://www.sba.gov/aboutsba/sbaprograms/sbdc/index.html>)

Workbook

1. Discuss the types of appointment systems available for use in the massage business.

2. Explain the advantages of an electronic appointment system.

3. Explain the components of an appointment matrix.

4. List the information that should be entered in the appointment book when an appointment is made.

5. What information is included on the following forms?

- a. Appointment card

- b. Appointment daily schedule

- c. Call list

6. List four rules for efficient management of an appointment book.
