5

Things an
ANSWERING SERVICE
Can Do to Support Your Small Business

PATLive

YOU THINK YOU KNOW WHAT WE DO...

But we do more than that! Promise.

Answering services have been around for many, many years. Perhaps you've even used one in the past for message taking or call forwarding.

It's essential that answering services keep up with the rapid pace of the business world, evolving as it does. The tasks agents manage now might shock you.

Here's a list of five surprising things answering services can do for businesses today.
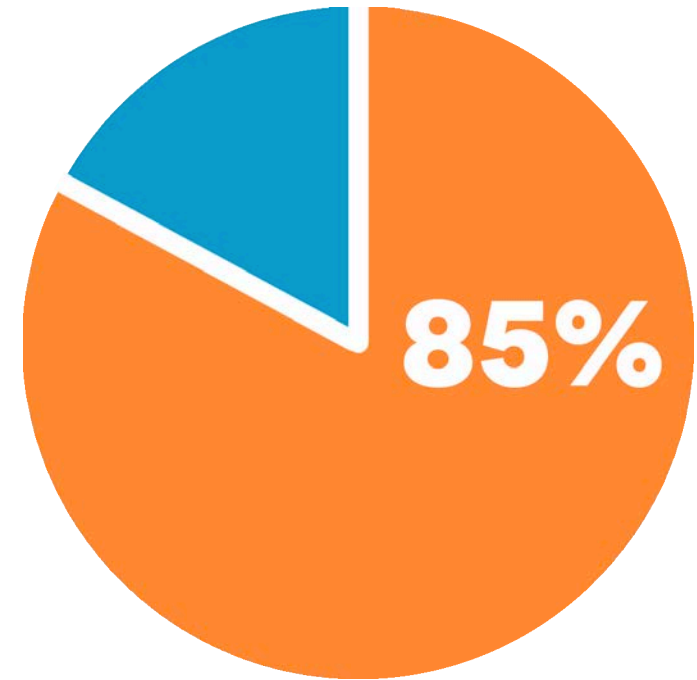
1

LEAD COLLECTION

Hundreds (maybe thousands) of people want to know more about your business. **Lead collection** is essential in connecting the right customers with your services or product.

The good news? You don't have to do it all on your own.

Answering service agents capture the exact information you want from your potential customers and deliver it right to you.

85%

Percentage of customers who won't call back after placing an unanswered call.

Agile

Bring your sales, marketing and customer service to one platform

Insightly

Marketing, Sales, and Project Management on a single platform

RealeFlow

Real estate investing software for marketing and business management

Zoho CRM

Web-based CRM designed to attract and retain business

Freshsales

Connect lead scoring and built-in phone, email, activity capture

NetHunt

Automate data flow to this CRM tied to Google Suite apps

SalesForce

Send leads directly to manage, score and nurture

Hubspot

Integrate marketing, sales, customer service in one platform

Podio

Connect to organize team communication and data

SugarCRM

Focused on the entire lifecycle to create meaningful CX

2

INTEGRATE WITH YOUR BRAND

Have you avoided a partnership with an answering service for fear the agents will sound like, well, agents? You will be pleasantly surprised by how seamless an answering service can sound.

A **scripting team** makes it possible for agents to capture the information that's most important to your business and (often) agents are asked not to read a script, but rather use it as a guideline for calls.

As long as you choose a reputable service based in the U.S., the agents will sound like they work in-house.

SAMPLE SCRIPTING:

1. Initial Recording: While a call is waiting to be answered by a Live Receptionist, this recording will play.

> **Sample:** "Please hold for a Healthful Clinic representative."

2. Opening Greeting: Live Receptionists will greet callers with this script. Please remember that this is the first impression of your business for callers.

> **Sample:** Thank you for calling Healthful Clinic. How may I assist you?

3. Collecting Information from the Caller
Schedule an Appointment:
Transition Script: I'd be happy to take an appointment for you.
- ☐ May I get your name please?
- ☐ What's your address?
- ☐ Your phone number, including the area code?
- ☐ May I get your fax number and email address please?
- ☐ What is the best day/time to call you?
- ☐ Desired Appointment Date/Time (1st choice): _____
- ☐ Desired Appointment Date/Time (2nd choice): _____

Cancel an Appointment:
Transition Script: I can take your cancellation for you.
- ☐ May I get your name please?
- ☐ What is the date/time of the appointment needing cancellation?
- ☐ Would you like to be contacted about rescheduling?
- ☐ If **YES**, what is the best contact number to reach you?

Reschedule an Appointment:
Transition Script: I would be happy to reschedule your appointment for you.
- ☐ May I get your name please?
- ☐ Your phone number, including area code?
- ☐ What is the best day/time to call you?
- ☐ What is the date/time of the appointment needing rescheduling?
- ☐ Desired Rescheduled Appointment Date/Time (1st choice): _____
- ☐ Desired Rescheduled Appointment Date/Time (2nd choice): _____

4. Closing Statement: This will be the closing of the call and will alert your caller of how the call will be handled once they have hung up the phone.

Thank you. That completes the information that I need to gather at this time. You will receive a confirmation of your appointment. Thank you for calling Healthful Clinic. Have a great day!
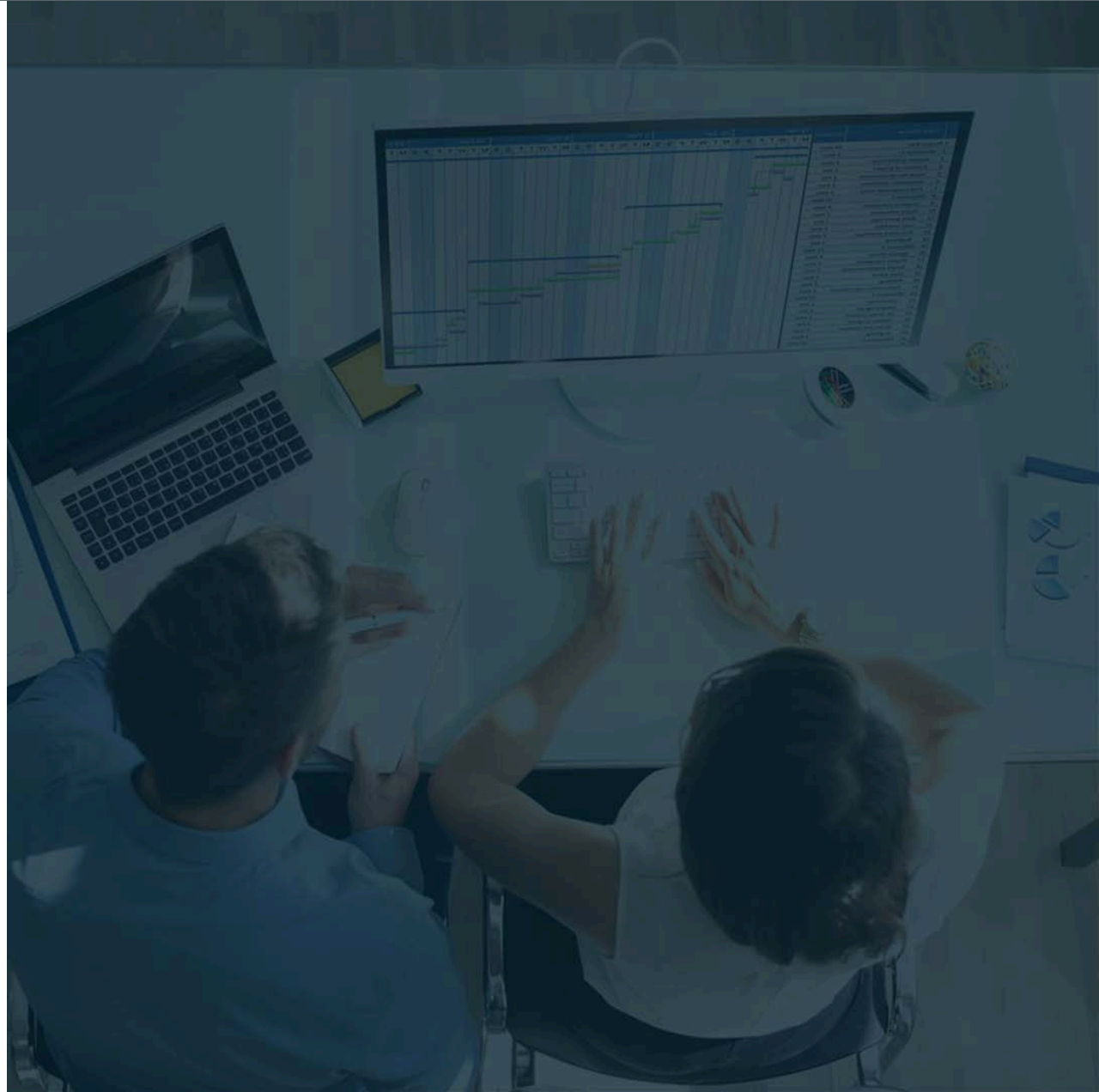
3
ORDER PROCESSING

CAN I TAKE YOUR ORDER?

Do you find yourself taking customer orders over the phone in evenings or on the weekends? **An answering service takes these orders for you.**

PATLive agents input orders using proprietary software OR they can use an existing portal.

PATLive

BigCommerce

Cloud e-commerce platform for growing businesses

Shopify

Leading platform for selling online or in-person

Wix

E-commerce website builder, inventory manager and checkout process

3DCart

Online store builder for small and medium-sized businesses

Etsy

E-commerce website focused on handmade or vintage items and craft supplies

Squarespace

All-in-one platform for websites and marketing tools

WooCommerce

Customizable e-commerce platform for online businesses
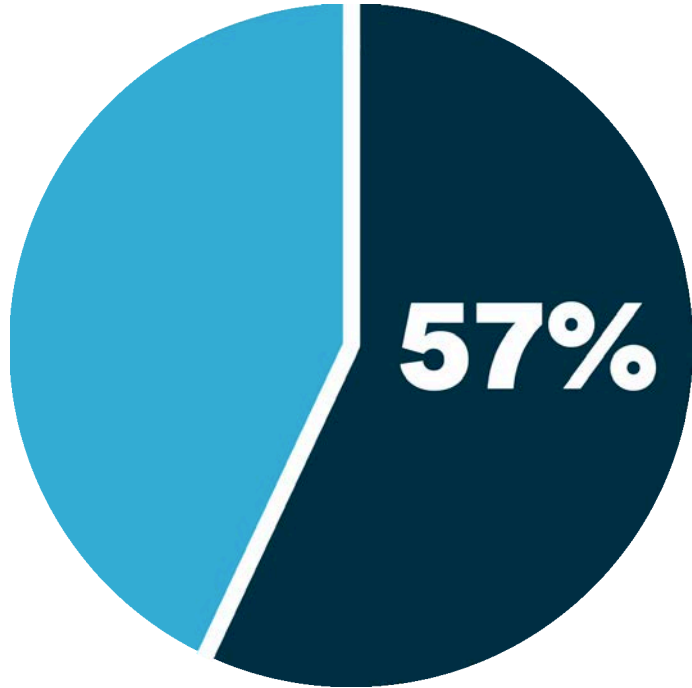
Magento

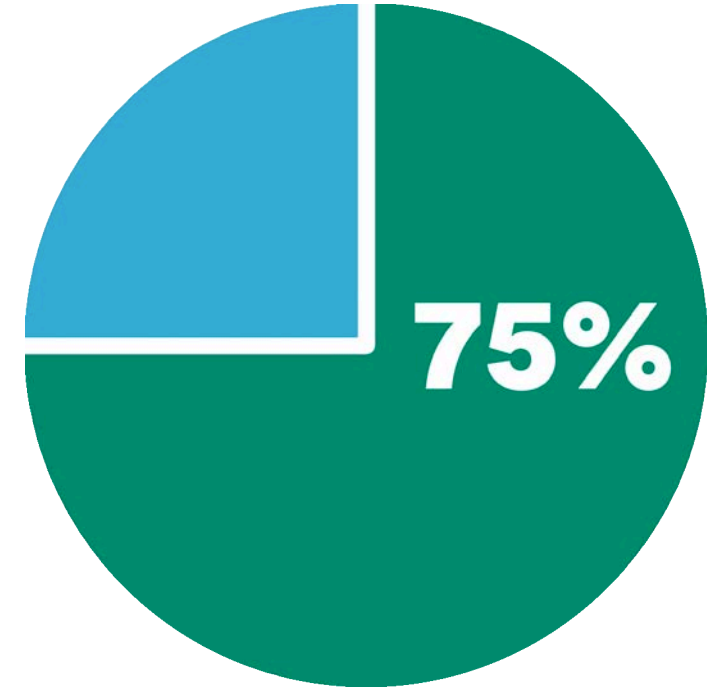E-commerce platform creating distinct digital retail experiences

Volusion

Online store builder with marketing, design and technical support

X-Cart

Modern and customizable e-commerce software

PATLive

57%

75%

Percentage of customers who have to switch from web to phone.

Percentage of customers who think calling is the quickest way to get a response.

4

APPOINTMENT BOOKING

PATLive

YOU ARE ON THE SCHEDULE

When you're busy and don't have time to answer the phone, it's tough to schedule appointments or manage your calendar.
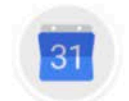
An answering service uses your favorite calendar system to schedule slots for your customers, clients, patients, etc.

AppointmentPlus
Appointment scheduling software for your small business or enterprise

MindBody
Wellness software connecting clients to businesses

Calendly
Automated scheduling software that works with your apps

Schedulicity
Scheduling software made simple for any business

Google Calendar
Time management and scheduling calendar service

SetMore
An online appointment scheduling and payment platform

15

5

CALL REPORTING

Want to know how many calls are coming into your business every month? Want to follow the progress of a direct mail campaign?

Call reporting makes that possible. PATLive's monthly call reports give business owners all the juicy details of their calls.

Every report includes overall call count, overall call duration, average call duration, a list of every call, the phone number that was dialed, geographic location, and the result of the call.

Once you know that you want to invest in an answering service, you need to find the right one for you. This means finding a service that meets all your needs, and offers the features that will benefit your business most.

The best features that all quality answering services should offer include:

- **Customization** - The best answering services will offer customization to ensure that their agents are always representing your business in exactly the way you want them to. Some will even offer custom call scripting that is perfectly tailored to your individual business.

- **Integration with the software of your choice** - Most businesses are attached to the business tools and software of their choice by the time they hire an answering service, so you should never have to sacrifice one tool for another. Look for answering services that offer full integration with the tools and software you're already using; it will save you time and money, and you won't have to learn anything new. A great answering service should become a seamless extension of your business, rather than complicating it.

- **Expansive services** - The more services and features an answering service can offer you, the better. Can they transfer calls to your employees, relay messages, process orders, and schedule appointments? Will they capture lead or caller information for you? The more your answering service can do, the more they'll help you - and you can count on their services as you grow. Ask up front what's included in their plans to ensure that you'll get all the assistance you need.

- **Extremely responsive** - When you hire an answering service, you want to know that calls will be answered faster than ever; PATLive is able to answer more than 90% of our calls in 20 seconds or less, for example. Look for a service that values fast answering times to ensure that you'll never miss a call - or a potential customer. The service you hire should be able to give you specific data about their answering time policies.

- **Script consultants on staff** - You know your business better than anyone, and we know ours. Some of the best answering services will have script consultants on hand to help you create the perfect call script that will elevate your business to its optimum potential. Whether you have no idea where to start or your current script just needs fine-tuning, script consultants can help you iron out any kinks and get you up and running, sometimes even within 15 minutes or less.

- **Easy setup** - Most of our clients who come to us are wary about what they fear will be a highly-technical, overly-complicated setup. We pride ourselves on making the process virtually painless; in many cases, for example, we start answering calls within 24 hours of a signed contract with new clients.

MAKE EVERY CALL COUNT

With PATLive's friendly & professional virtual receptionists.

100%
U.S. based live receptionists, all located in sunny Florida.

2M+
calls answered every year, on average within 4 rings or less.

29 yrs
trusted experience partnering with thousands of businesses.

PATLive

Start your free 14-day trial today at www.patlive.com.
Email sales@patlive.com or call us for a live demo at (800) 775-7790.
We're here 24/7/365.