The Ultimate
Call Center Playbook
for DSO Leaders

TRANSFORM YOUR CALL CENTER
FROM A COST CENTER TO A PROFIT CENTER

State of Call Centers

Dental Support Organizations (DSOs) in 2025 face a perfect storm of challenges in their call centers.

The broader U.S. healthcare industry is in an unprecedented **workforce crisis** – roughly 47% of American, a wave likely to hit call center staff first. Dental call centers, as the front line for patient inquiries and appointment scheduling, feel this strain acutely. They're grappling with record-high staff turnover, widespread agent burnout, and ever-increasing patient expectations for service speed and quality.

On top of staffing woes, many call centers are stuck with **outdated technology**; for example, 84% still rely on old-school IVR menus and ACD systems to handle calls. Such legacy tools frustrate patients and agents alike, and they can't keep up with modern demand, leading to chronically long hold times and frazzled employees.

47%

Of American healthcare professionals plan to exit the industry by 2025
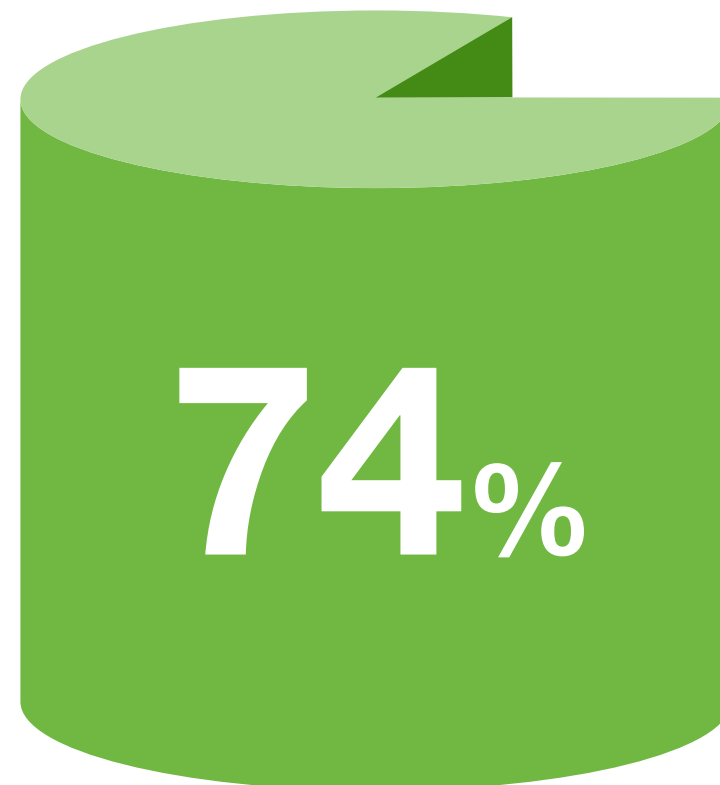
State of Call Centers

These issues have traditionally led executives to view call centers as cost centers – necessary evils that drain budgets. In fact, healthcare call centers spend on average 43% of their operating budget on labor alone. Leadership often puts pressure on contact center managers to justify this spending.

The good news? There's a huge opportunity here: by improving patient experience and operational performance, dental call centers can **transform from cost sinks into profit centers**. If DSOs can fix the issues of staffing, burnout, and tech, their call centers can become revenue-generating engines that fuel growth.
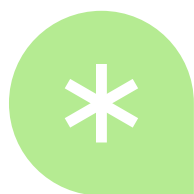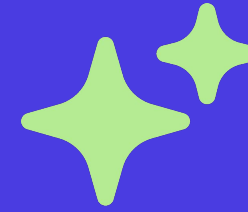
* When patients are happy with call center service, they are more likely to stay and invest in care.

A recent survey found 74% of Call Center leaders feel pressed by their executives to prove the Call Center is not a cost center.

74%

The Dental Call Center Playbook from VoiceStack

To help DSOs convert their call centers to profit centers, we've compiled this practical step-by-step guide to set up and optimize the 3 key pillars of call center operations - **people, processes, and technology**. This playbook covers everything from foundational setup to advanced strategies like AI and outsourcing.

VoiceStack

A **Step-by-Step** Guide to Setting Up the Foundation

This section covers all the basic requirements that you should consider while setting up a call center for your DSO.

1. Plan the Space

Determine if you have space in one of your larger dental practices or corporate offices to house the call center. The number of employees will largely determine your space needs.

The footprint is not the only consideration. Factoring in noise, natural light, and furnishings will produce a motivating workplace for your call center team.

If you place your call center at one of your existing practices, it should be separate from the rest of the operation to ensure the teams do not distract one another during work hours.

Check List

- ❏ Open Spaces / Partitioned Spaces
- ❏ Modular Workstations
- ❏ Adjustable Chairs & Desks
- ❏ Proper Lighting
- ❏ Acoustic Panels
- ❏ White Noise Machines
- ❏ Reliable Internet

2. Budgeting

Speaking of planning, **Budgeting** is part of the foundation too.

- Labor will be your biggest cost, but don't skimp on technology investments that make your team more efficient.

- Modern cloud-based call center software can be a force-multiplier for the agents at a DSO, so allocate a budget for the tools that will save you money in the long run.

- Also consider the hours of operation you'll support – many DSOs choose to extend evening or weekend hours to capture more patient calls, effectively expanding capacity without opening new offices.

Check List

- ❏ Hiring Costs

- ❏ Physical Space & Build if Needed

- ❏ Phone System & Required Software

- ❏ Sound Dampening Fixtures

- ❏ Noise-Cancelling Headsets

The Bottom Line
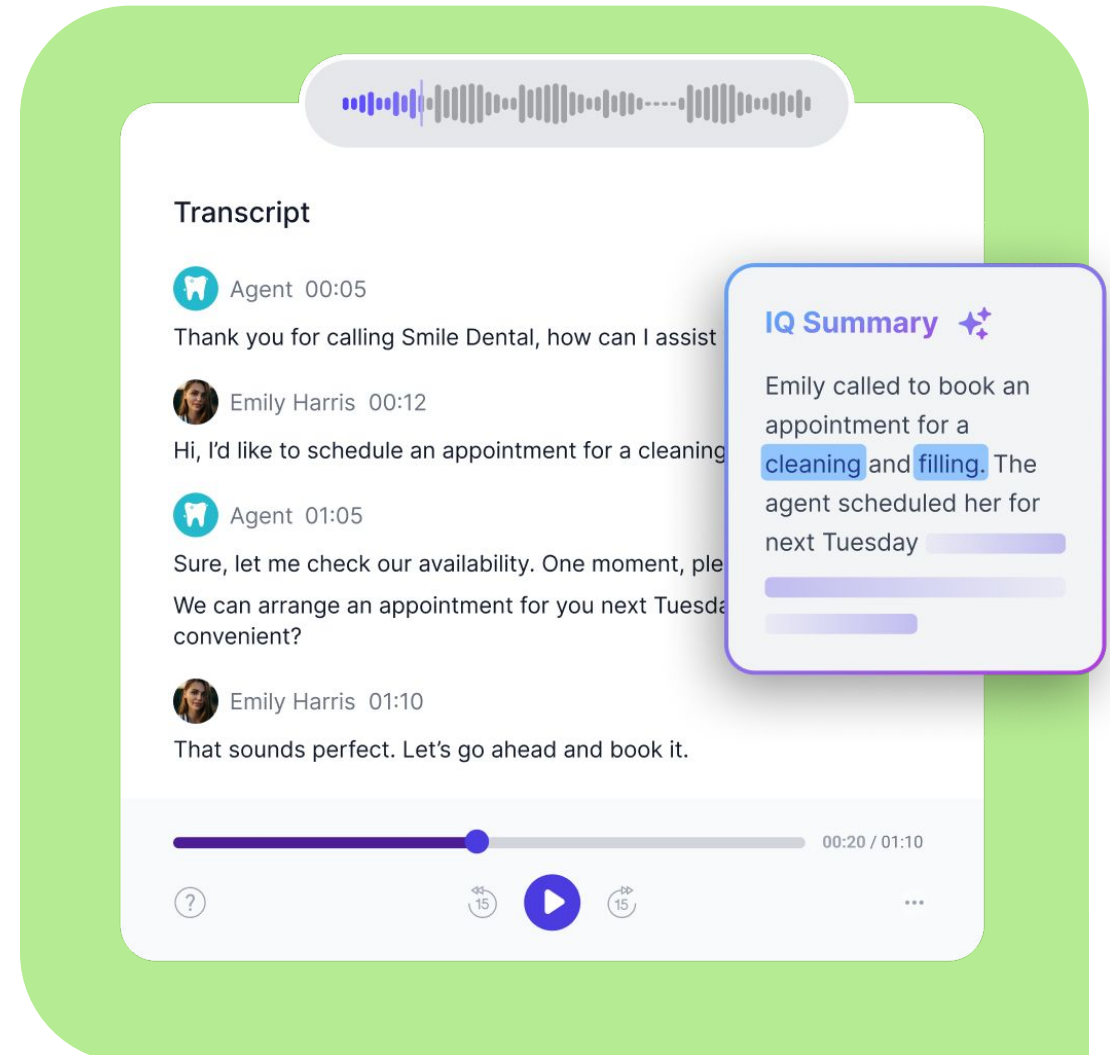
Lay a solid foundation by planning out your call flows, building a capacity model, and budgeting for the right resources.

VoiceStack

3. Plan Your Toolkit

Modern call centers are reducing the number of software solutions they use, deploying AI solutions designed to assist staff during calls. **Unify as many solutions** as possible and keep integrations to a minimum, so that your team is not drowning in software.

Below is a short list of must-have solutions and integrations:

📞 VOIP Phone System

✨ Realtime AI Transcription

⚙️ AI Task Management

🖥️ Integration into your PMS

Transcript

🦷 Agent 00:05
Thank you for calling Smile Dental, how can I assist

Emily Harris 00:12
Hi, I'd like to schedule an appointment for a cleaning

🦷 Agent 01:05
Sure, let me check our availability. One moment, ple
We can arrange an appointment for you next Tuesda
convenient?

Emily Harris 01:10
That sounds perfect. Let's go ahead and book it.

00:20 / 01:10

IQ Summary ✨
Emily called to book an appointment for a cleaning and filling. The agent scheduled her for next Tuesday

4. Map Out the Call Flows

Start by defining what you want your patient call experience to look like. Gather your team and **map out the call flows** and scenarios.

What information will agents need?   What questions will they ask?

What should happen when a patient calls?

Answering these basics helps you design call routing, staffing, and scripts before the first call comes in. In practice, this means sketching a simple flow diagram of incoming calls: *If line 1 is busy, does it roll to line 2? How are after-hours calls handled?*
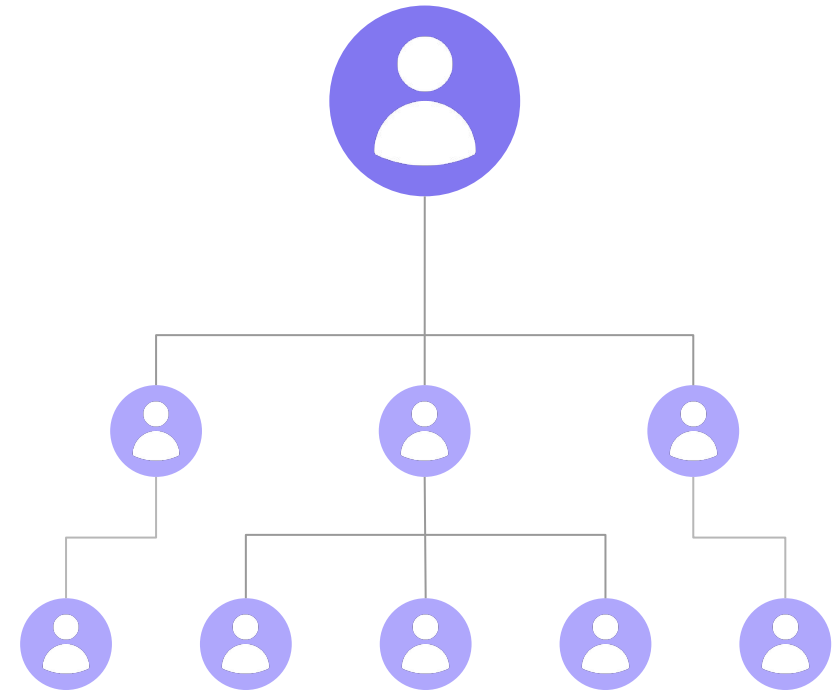
Call Flow Strategy Example   ＊

You may route calls between regions or clinics to extend coverage and minimize wait times – morning calls go to your East Coast team, midday overflow rolls to a Central time zone team, and after-hours return to the East. By mapping this out, you can create a flexible routing design that optimally uses all your offices.

5. Capacity Planning

When setting up a call center, you'll need to build a **capacity model** that links your expected call volume with the number of agents required. Capacity modeling ensures you hire enough people to cover demand (and avoid swamped phones), but not so many that they sit idle.

Forecast how many patient calls you anticipate (per day or hour), and work backward to figure out staffing needs. Industry playbooks suggest using order or appointment volume as a starting point – e.g. *X* appointments generate roughly *Y* inbound calls requiring *Z* agents.

✳ *It's wise to slightly over-hire or cross-train staff so you can handle growth spurts, rather than be caught short-handed during a big marketing promotion or the end-of-year rush.*

Modeling Example

While modeling we also need to factor in "shrinkage," the fact that an agent isn't on the phone every minute of their shift.

For instance, a 20% shrinkage (about 1.5 hours per 8-hour shift) for breaks, training, and admin is typical.

So an agent with a 40-hour week actually has ~32 hours of call handling time. If an agent can handle say 12 calls per hour on average, that's ~384 calls per week per agent.

With those numbers, if your DSO call center gets 1,000 calls a week, you'd need about 3 agents.

Essentials of
Staffing your Call Center

This section covers all the basic requirements that you should consider while hiring people for your DSO call center.

Hiring the Right Team

Even the best call center game plan won't go far without the **right people** to execute it. Call centers have a reputation for high turnover, so it's important to have a selective hiring process that focuses on candidates with long term potential.

So what makes for a great dental call center agent, and how do you hire and keep them?

- It starts with defining the **skills and traits** that fit your organization. Beyond basic phone etiquette and computer skills, many leading call centers hire for **soft skills** and mindset.

- Every DSO may value these traits differently, but the point is to **hire for attitude and aptitude**, not just resume credentials.

- Don't be afraid to **set a high bar** – these reps are the *face of your organization* to patients, so you want the best people on the front lines.

28%
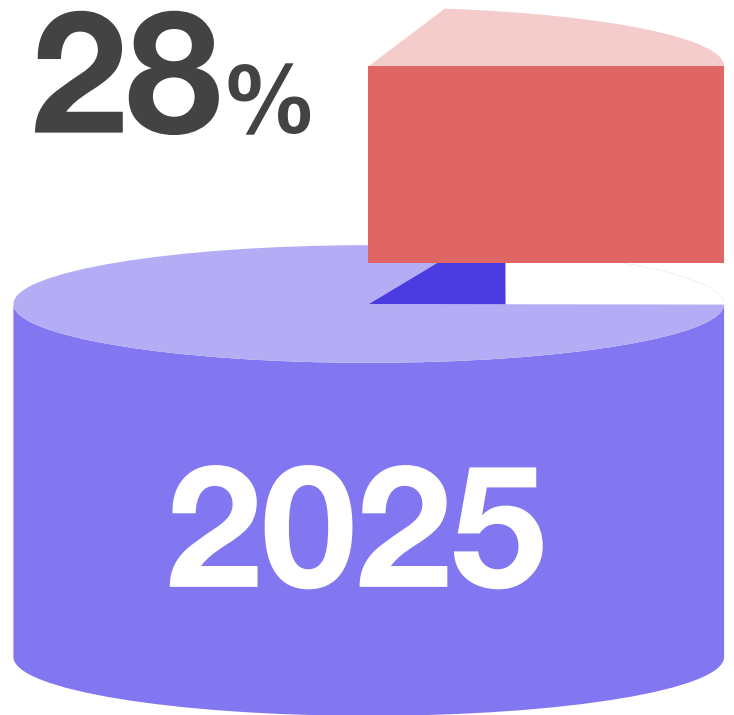
2025

*About **28%** of Front-Office Associates to apply for new positions in 2025, with higher pay (78%), better benefits, and improved hours being the top motivators.*

Hiring the Right Team

Open-Mindedness

Can they think critically and propose multiple solutions to a problem?

Flexibility

Are they able to adapt when faced with constant change in schedules, scripts, or patient needs?

Knowing when to Bend the Rules

Can they discern when it's okay to make an exception for the sake of an excellent patient experience (for instance, squeezing in an emergency appointment)?

Persistence

Will they *"exhaust every avenue and resource to get the job done"* for a patient?

Hiring the Right Team

🎓 Coachability

While previous experience helps, someone who is open to learning and has a high aptitude is more valuable than someone who has spent five years working at a dental practice and has a bad attitude. Look for **curiosity, open-mindedness, and a willingness to follow a proven process.**

☀ Emotional Intelligence

People make decisions based on emotional reasons. That's why it's essential to find employees who can understand potential patients' frustrations and needs. Look for candidates who **listen and display empathy.**

💬 Communication Skills

Look for **polite, upbeat candidates** who enjoy talking to people.

58%

of job performance is influenced by Emotional Intelligence (EQ)

90%

of top performers at work have high Emotional Intelligence

Onboarding & Training

A thoughtful onboarding program can dramatically improve how long new hires stay.

Take the time in a new hire's first weeks to teach them not just the phone system and scripts, but also your DSO's values, workflows, and the "why" behind excellent patient service.

One effective approach is to **get newbies on the phone** *sooner* **than later** (after some shadowing), so they can learn by doing with close coaching. For example, you can let new reps listen to calls for a day, then handle short calls on day two with a mentor, gradually ramping up call length over the first two weeks. This balanced "learn then do" onboarding prevents boredom and builds confidence quickly.

It's also wise to **pair new agents with a seasoned "buddy"** or mentor for their first few months, so they have someone to turn to with questions and to model best practices.

69% of employees are more likely to stay with a company for 3+ years if they had a great onboarding experience.
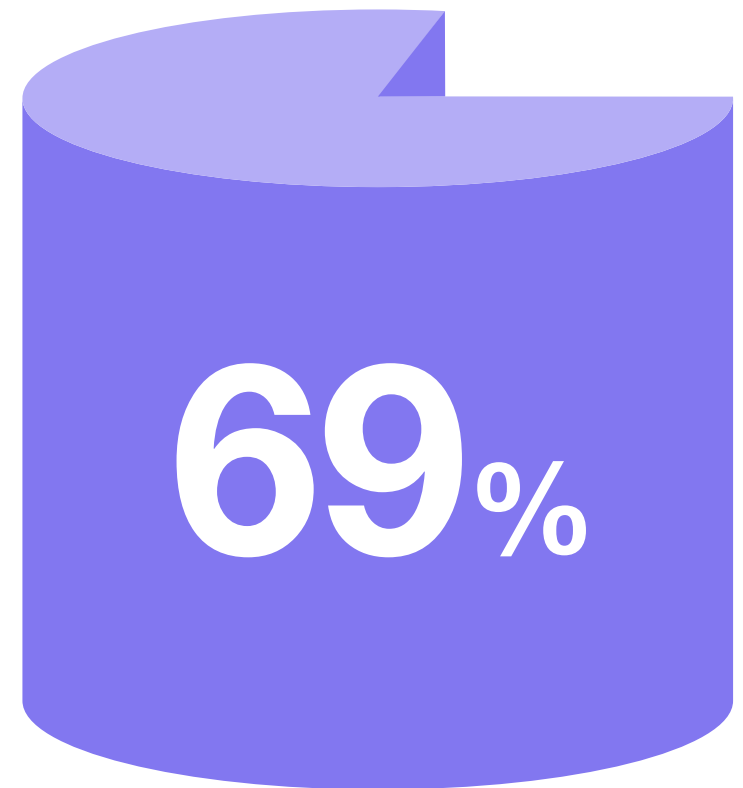
69%

Retaining your Best Performers

- To retain your trained agents, focus on creating a **positive, engaging work environment.**

- Call center work can be **stressful** (angry patients, back-to-back calls, etc.), so leadership needs to actively prevent burnout and turnover.

- Keep investing in your team's **training and development**. Ongoing training not only improves service, it makes employees feel valued.

- Finally, consider **flexibility as a retention tool**. In today's market, rigid schedules can drive people away. If possible, offer some work-from-home shifts or flexible hours, which is very much feasible with modern cloud call center systems like VoiceStack.

*In summary, **hire for customer-centric skills, onboard thoroughly, and create a culture that agents want to be a part of**. Your patients will hear the difference in every call.*

Picking the Right Software Systems

Modern technology has opened up new possibilities to make your call center more efficient and impactful. But how do you pick the right technologies to power your business?

Choosing the Right System

Key software capabilities to look for include:

- HIPAA Compliance (for patient data privacy)

- Uptime higher than 99.9%

- Intelligent call routing

- IVR menus you can customize for your practices,

- Call recording (for quality assurance)

- Real-time reporting dashboards

- Integration with your existing systems – especially your CRM, PMS and Analytics systems

- Ability to feed data to your CRM to help analyze patterns and outcomes

- Ability to show relevant patient information screen-popped in front of your agents when a call comes in.

*When evaluating software, also think about **future needs** like omnichannel support. Many dental call centers today handle more than just voice calls – they might also be fielding emails, texts, or web chat inquiries from patients*

An integrated software setup can automatically log calls to a patient's record, track appointment bookings from calls, and even trigger follow-up tasks.

*In a DSO context, that means you could, for instance, **see that 30% of new patient calls ask about financing** – insight you can use to proactively address that on your website or training.*

Choosing the Right System

The technology stack running your call centre is like the backbone – it supports your agents and workflows every minute. Choosing the right phone and call center software is thus a major strategic decision.

The first big choice is **Cloud-Based vs. On-Premises** systems. In the past, setting up a call center meant buying costly PBX hardware, phone lines, and hiring IT specialists to keep it all running. That's no longer the case, with modern cloud based systems taking away most of the overhead of setup and maintenance from the call centers.

ON-SITE

- ✕ This usually involves using VoIP software through an IP PBX (An IP PBX is a private branch exchange or a telephone switching system within an enterprise that switches calls between VoIP users on local lines while allowing all users to share a certain number of external phone lines)

- ✕ Your business will be responsible for setting up, configuring, and maintaining all the required infrastructure, hardware, and software.

- ✕ This type of configuration requires time, energy, expertise, and a more considerable upfront investment.

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CLOUD-BASED

RECOMMENDED ✓

- ✓ The responsibility for hardware and infrastructure will sit with your service provider.

- ✓ You install the software and set up a reliable internet connection.

- ✓ Adding new users is simple; users can access the system from anywhere with the proper permissions.

- ✓ Allows for easy integration into your practice management software.

Choosing the Right System

With a cloud system, your agents just need a headset and internet connection to take calls – whether at a central office, a dental practice, or even working remotely from home.

All the heavy tech (call routing, IVR menus, call recording, etc.) is handled through software that's hosted online. This means **quicker setup and easier changes**.

You also **do not require specialised external IT help** for any changes.

Cloud systems also **update automatically with new features**, whereas on-prem systems often become outdated and require expensive upgrades (one reason so many call centers are stuck with 1990s-era tech).

For DSOs, a cloud-based call center software is usually the smart choice – it support multi-site operations out-of-the-box and can scale as you add new clinics.

Choosing the Right System

Opt for a flexible, cloud-based contact center solution that integrates smoothly with your patient management and CRM systems.

It will empower your team with information at their fingertips and streamline workflows through automation, reducing manual work and improving patient experience.

Make this decision carefully, as it will impact every call your DSO handles.

Did You Know?

VoiceStack is the most advanced cloud-based AI-powered telephone system for Enterprise DSOs, with AI trained on thousands of hours of dental front desk calls. Custom made to help Dental offices.

✓ Instantly Re-Engage Missed Calls   ✓ Improve Staff Performance

✓ Convert Missed Opportunities with AI
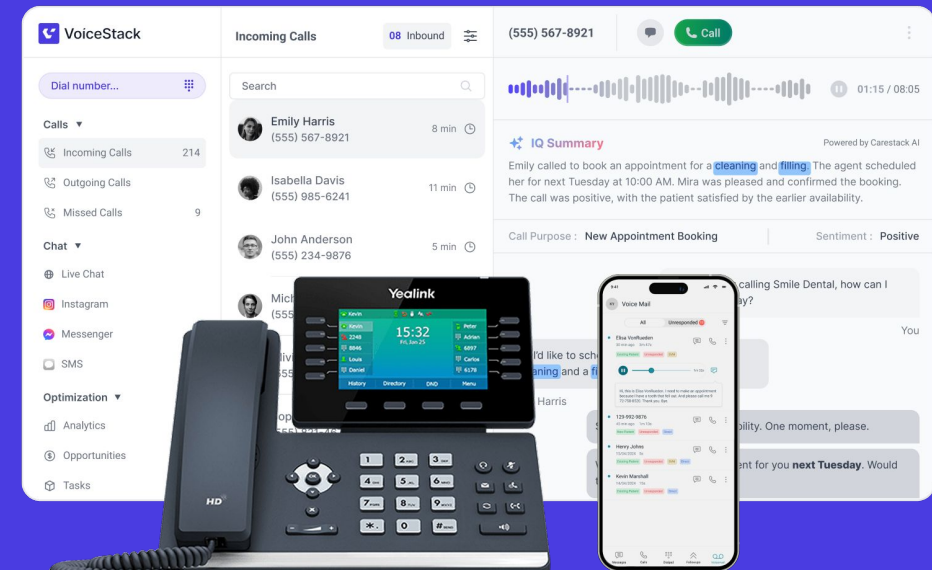
 VoiceStack

Setting up your Call Center Analytics with VoiceStack

In this section, we will show how VoiceStack can help you measure, monitor and optimize the most important metrics that contribute to the ROI calculation of your Call Center.

Call Center ROI

The Return On Investment (ROI) of the DSO call center depends heavily on its primary purpose—whether it functions as an overflow call centre or as a patient engagement centre.

Overflow Call Centers

For overflow centers, the key metric is the **call answering rate**. These centres exist to ensure that no patient call goes unanswered, especially during peak hours.

Patient Engagement Centers

For engagement-focused centers, ROI is tied to the **number of appointments booked per employee**.

Overflow Call Centers

- ❏ The minimum acceptable answer rate should be at least 85%.

- ❏ Ring duration should ideally be under 15 seconds.

- ❏ There should be no long greeting messages or excessive wait times—speed is the priority.

The Types of Metrics

"You can't improve what you don't measure," as the saying goes, and it's especially true for call centers. By systematically identifying, measuring, monitoring, and optimizing the most relevant **key performance indicators (KPIs)**, DSOs can improve patient experiences, increase revenue from booked appointments, and enhance overall practice efficiency. These metrics become even more crucial as patient expectations rise and competition intensifies.

Moreover, monitoring KPIs fosters a culture of continuous improvement, a cornerstone for any ambitious dental organization. DSOs that deeply understand their call center data can spot trends, predict demand spikes, and even identify training gaps. In turn, targeted improvements - backed by both technology and well-defined processes-lead to better patient care and a stronger market position.

In this section, we will look into KPIs that DSOs should prioritize in their measurement strategies. These metrics have been selected based on their direct impact on patient satisfaction, revenue generation, and operational efficiency.

1 **Call Initiation Metrics**

Help quantify a customer's initial interaction with your call center, which in turn shapes their perception of the organization.

2 **Call Conversion Metrics**

Shows the effectiveness of your call center in converting prospects into patients.

3 **Agent Performance Metrics**

Measures the availability and performance of your individual team members.

Call Initiation Metrics

First Response Time

First response time (FRT) gauges the amount of time a customer must wait before connecting with an agent. Often, call centers look at this number daily and weekly, but also evaluate annual trends.

FRT = Total Time Waiting for all Calls / Total Number of Calls

Percentage of Calls Blocked

With this metric, call centers can learn how many customers receive a busy signal when they call. Ideally, this metric should be very low for most businesses.

% of calls blocked = Calls That Do Not Reach Agents / Total Incoming Calls

If it's higher than expected, you might need to evaluate whether you have an adequate system for receiving incoming calls. Also, you can assess whether call lengths are excessive and causing unwanted busy tones for customers.

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Call Initiation Metrics

Call Answer Rate

Industry data suggests that the average dental practice can miss anywhere between 27% and 38% of inbound calls—a substantial figure when you consider that each call can represent a new or existing patient seeking care. This means two out of every five potential patient interactions can slip through the cracks if call centers are not well-structured.

Call Answer Rate = Attended Calls / Incoming Call

Missed Call Return Time

The **Missed Call Return Time** is an important metric for DSO call centers. This represents the time between a call being missed, and an agent calling the patient back. It should ideally be less than 2 mins. The higher the Missed Call Return time, the lower the probability of the patient being re-engaged and converted.

How to Measure
Call Initiation Metrics
with VoiceStack

VoiceStack enables DSOs to regularly generate **reports** that show how many calls were missed on specific days, during specific hours, or by specific teams.

In addition VoiceStack also provides a **real time wall-board** that helps practice operators get a real time view of what's happening across locations, or at their central call center.

8 Waiting Now	**2350** Inbound Calls	**729** Inbound Missed	**1234** Inbound Answered
741 Outbound Calls	**00:01:38** Avg Conversation Duration		**355** Unresponded Calls · 223 Missed Calls · 132 Voicemails
198 Live Agents · Available:180 · On a Call:13		**00:37:38** Missed Call Response Time	

How to Optimize Call Initiation Metrics with VoiceStack

VoiceStack helps Dental DSOs optimize their call initiation metrics with advanced AI-driven features:

- **AI Voicemail Responses**
  VoiceStack has the ability to respond automatically with AI generated messages when a call goes to voicemail during busy or after-office hours. This helps call centers continue a chain of communication with the prospective patient even when they are offline.

- **AI-Generated Missed Call Notifications**
  VoiceStack send notifications to a configurable list of agents when a patient call is missed. This ensures that the next available agent is notified and prompted to call the patient back at the earliest, increasing the probability of converting the patient.

DSO Call Centers miss calls due to a variety of reasons

- ❏ Complex Phone Trees
- ❏ Lengthy Greeting Messages
- ❏ Staff is busy with patients
- ❏ Staff is on other calls
- ❏ Staff is on break
- ❏ Office is closed

How to Optimize Call Initiation Metrics with VoiceStack

- **Cloud Call Queues**
  VoiceStack provides a real time call queue that shows the number of calls waiting to be picked up. As soon as an agent finishes his/her call, they can click on the Call Queue and be instantly connected to the next caller on the queue, thus reducing response times.

- **Optimizing Capacity during Peak Time**
  DSOs can use VoiceStack's reporting to identify peak times or patterns in their call answer rates. This in turn gives practices the visibility add additional agents to answer the phone calls during these peak hours.

*Inefficient capacity planning in call centers can result in the **loss of up to 10-15% of operational time**, leading to substantial revenue losses for larger organizations.*

Call Conversion Rate

The Call Conversion Rate gauges the percentage of calls that result in a booked appointment.

A call center with a high conversion rate means front-desk teams have the skills, knowledge, and resources to effectively transform inquiries into commitments. This KPI also highlights the efficiency of your marketing efforts. If your marketing brings in leads but your call center fails to convert them, you risk wasting marketing spend.

How to Measure?

Tracking call conversions typically involves linking each incoming call to a final outcome: booked, pending decision, or lost. Integrating phone software with practice management systems (PMS) can offer a near real-time view of these outcomes, indicating how many calls end with a newly set appointment.

53%

*On average, dental practices convert **just 53%** of phone inquiries into appointments, leaving significant room for improvement.*

*By pushing this rate **closer to 85%**, practices can see dramatic boosts in new patient numbers.*

*

With VoiceStack's advanced analytics, practices can easily create reports that show the Call Conversion Rate at their DSO call centers.

High-Value Treatments Booking Rate

While routine appointments (e.g., cleanings, check-ups) drive steady, predictable revenue, high-value procedures such as root canals, implants, or cosmetic dentistry cover a broader share of overhead and can greatly boost monthly or quarterly revenues. The **High-Value Treatments Booking Rate** measures the percentage of calls that lead to booking such complex and profitable treatments,.

By measuring this KPI, DSOs can evaluate how well the call centre identifies and captures these high-value opportunities.

How to Measure It

A ratio of "appointments for high-value treatments" to "total high-value treatment inquiries" provides the booking rate.

VoiceStack provides reports that help DSOs easily derive this data.

High Value Tx

- Dental Implants
- Root Canal Therapy
- Crowns & Bridges
- Dentures
- Full Mouth Restoration
- Veneers
- Teeth Whitening
- Orthodontics
- Periodontal Treatment
- Surgical Procedures

Optimizing Call Conversion Metrics with VoiceStack

- By first identifying and prioritizing high-value patient inquiries, VoiceStack ensures your team focuses on the most profitable opportunities.

- Through advanced transcription and analysis of every call, VoiceStack reveals why patients call, tracks appointment outcomes, and uncovers lost opportunities.

- VoiceStack then applies conversion probability scores to highlight leads worth pursuing, guiding strategic follow-ups. It also generates a suggested list of follow-up tasks to be associated with each call, thereby simplifying the re-engagement playbook for agents.

"

Unlocking high-value opportunities hidden in our call data empowered us to convert more high-value patients effectively."

Katie Post
CEO, Northwest Dental Group

Optimizing Call Conversion Metrics with VoiceStack

68% of patient conversions in dental practices come via phone calls.

- Beyond conversions, VoiceStack also **assesses critical customer service elements**—from introductions and empathy to rapport-building, appointment booking attempts, and closing techniques—ensuring top performers are recognized and training needs are met.

- VoiceStack is also **deeply integrated with Google Adwords and Google Analytics**, which means that it can link bookings to specific marketing channels. This allows for precise attribution of RoI (Return on Investment) and RoAS (Return on Ad Spend) thereby helping DSO decision makers identify the channels to focus on future growth.

Achieving this significant growth requires a shift in mindset to **recognize every phone call as an opportunity**. Combining this shift in perspective with the class-leading AI capabilities of VoiceStack can help DSOs significantly improve their call conversion metrics.

68%
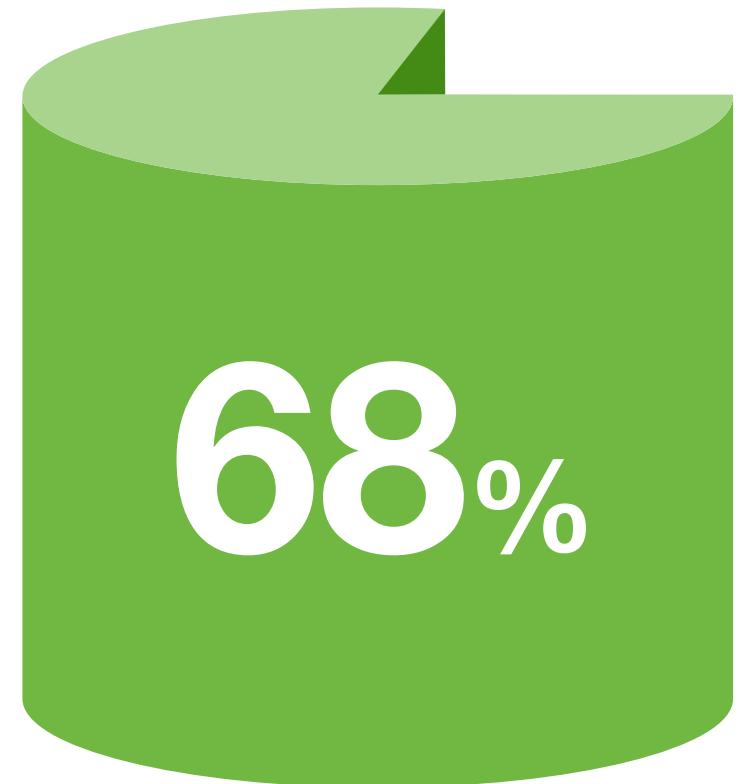
Agent Performance Metrics

Calls Answered Per Hour

A fairly easy metric to track, calls answered per hour measures the average number of calls an agent or team handles within an hour. This is a productivity metric above all else, but it's useful in determining bottlenecks that may be slowing down response times.

To put it in perspective, if you optimize your calls answered per hour, you're effectively increasing service capacity without compromising call quality.

Call Availability

Call availability refers to the amount of time agents are available to take calls, as opposed to being occupied with a different call or other tasks. The time agents use to fill out paperwork, take on administrative tasks, and perform other duties isn't taken into account when calculating call availability.

High call availability means your agents are frequently accessible to customers. This directly translates to lower wait times and faster resolutions.

Gamification

Introduce game-like elements such as leaderboards, challenges, and team competitions to make work more engaging. Ensure that the rewards are meaningful and proportionate to the achievements

Agent Performance Metrics

Agent Utilization Rate

Agent utilization rate measures the amount of time your team spends handling calls or other tasks, as opposed to being idle and waiting for a call to answer.

This percentage helps measure agents' time management and productivity. A high utilization rate means your agents are consistently engaged, whether it's through a call or other form of work.

Average Handle Time (AHT)

Average handle time is the average time an agent spends on a call, including talk time, hold time, and after-call tasks. It's a key efficiency metric that helps you spot complex queries and gaps in training.

A low AHT means quicker resolutions and shorter calls, while a high AHT means calls have long durations.

*Aim for an **agent utilization rate between 75-90%,** balancing workload to prevent burnout while maintaining productivity.*

*The average AHT in healthcare call centers is **approx. 6.6 minutes.***

VoiceStack

Agent Performance Metrics

Wrap-Up time

Wrap-up time, or after-call work, is the time agents spend handling tasks related to a call after it ends, such as updating records, documenting outcomes, or scheduling follow-ups.

A low wrap-up time means agents can efficiently handle post-call tasks, while a high wrap-up time may indicate complicated and time-consuming post-call processes.

Average Conversion Rate

The **Average Conversion Rate** for an agent calculates the percentage of calls attended by that agent that result in a booked appointment for the DSO. This metric tells us how effective the agent has been in converting incoming calls into appointments. A higher conversion rate indicates that the agent is skilled in converting more incoming enquiries into booked appointments.

Rewarding Call Center Agents

- ❏ Performance-Based Monetary Incentives
- ❏ Extra Paid Time Off (PTO)
- ❏ Flexible Scheduling
- ❏ Professional Development Opportunities
- ❏ Public Recognition and Awards
- ❏ Gamification
- ❏ Wellness Incentives
- ❏ Non-Monetary Perks
- ❏ Team-Based Rewards

How to Measure Agent Performance with VoiceStack

<div style="background-color: green">1</div> **Capacity Utilization Report**

Helps the call center administrators decide on whether to increase or reduce staff.
It consolidates all key availability metrics around availability in one simple, easy to use interface.

Capacity Report

Location [PCC/PSC ⌄] Show only [Last 7 days ⌄]

[Search 🔍]   [⟳] [Export CSV] [Columns ⌄]

Agent Name	Location	Total Available Time	Total Calls Handled	Total Time on Call	Total Time on Wrapup	Total DND Duration
Hannah Joseph	PCC/PSC	7h:29m:01s	27	0h:43m:57s	1h:15m:05s	41h:34m:57s
Donna Benjamin	PCC/PSC	0h:00m:00s	0	0h:00m:00s	0h:00m:00s	0h:00m:00s
Shane Harrison	PCC/PSC	31h:29m:38s	64	3h:32m:04s	5h:14m:39s	4h:38m:31s
Martha Stephenson	PCC/PSC	20h:15m:01s	49	2h:36m:46s	4h:33m:06s	4h:49m:16s
Ben Fernandez	PCC/PSC	20h:18m:19s	58	4h:36m:12s	9h:24m:37s	0h:00m:00s
Iris Jimenez	PCC/PSC	13h:01m:32s	98	6h:36m:43s	26h:12m:22s	1h:08m:11s
Manuel Gordon	PCC/PSC	22h:36m:01s	52	2h:56m:32s	5h:13m:24s	12h:37m:12s
David Peterson	PCC/PSC	0h:00m:00s	0	0h:00m:00s	0h:00m:00s	0h:00m:00s
Susan Thomas	PCC/PSC	6h:29m:01s	24	0h:36m:52s	1h:03m:27s	23h:14m:27s

How to Measure Agent Performance with VoiceStack

| 2 | **Real-Time Agent Visibility Dashboard** |

Helps team leads to quickly identify the distribution of current and incoming calls between agents, enabling them to intervene and take corrective measures as needed.

| Search 🔍 | Location [All ⌄] | | | Queued Callers 18 |

Sort by [Name(A-Z) ⌄]   Call Queue [All Co... ⌄] ✕ Ring Group [All ⌄]

| All Agents 18 | Available Agents 08 | On Call Agents 10 | DND Agents 03 | Offline Agents 15 |

Hannah Joseph ext-110 `On Call` 3m 31s	**Conor Reyes** ext-139 `On Call` 6m 18s	**Elizabeth Wilson** ext-130 `Available`	**Kelly Andrews** ext-108 `DND` Until 05:30 PM
Isabella Cortez ext-149 `Offline`	**Jamie Hannigan** ext-135 `Available`	**Camilla** ext-111 `On Call` 4m 21s	**Elsa Thomas** ext-150 `Available`
Helen Daniel ext-122 `Available`	**Jason Foster** ext-138 `Offline`	**Nathan Mathew** ext-109 `Available`	**Christopher Delaney** ext-112 `On Call` 2m 47s

How to Measure Agent Performance with VoiceStack

3 **Staff Performance Dashboards**

Helps DSO leaders and staff members see the relative performance of all team members and identify the best performers and their best practices.

Staff Performance

| Location | All ⌄ | Number | All ⌄ | Direction | Inbound ⌄ | Show Only | Last 30 Days ⌄ |

Top 5 Agents by Booking

○ Opportunity Calls ● Booked

Top 5 Agents by Booking

● Positive Sentiment

Top 5 Agents by Negative Call Sentiment

● Negative Sentiment

Staff Performance

Contact Type | All ⌄ | Export CSV

Agent	Answered Calls	Opportunity Calls	Booked	Not Booked	Avg Wait Time	Avg Conv. Duration
Hanna Joseph	463	133	86 (64.7%)	47 (35.3%)	4 secs	136 secs
Donna Benjamin	379	121	83 (68.6%)	38 (31.4%)	8 secs	188 secs
Martha Stephenson	321	96	76 (79.2%)	20 (20.8%)	10 secs	153 secs

Optimizing Agent Performance with VoiceStack

1. Call Coaching Module

VoiceStack analyzes each call made by an agent, scores the call based on agent performance and patient happiness across multiple criteria. The analysis also provides a list of things that the agent could have done better during the call. Coupled with call transcripts and summary, this works as a powerful tool to constantly improve agent performance by identifying their weaknesses and providing improvement tips.

Staff	No. of Calls	Pat. Happiness	Performance	Introduction
Laura Sanchez	79	79	84	Exellent
Lisa Brown	77	80	90	Exellent
Emily Carter	34	58	72	At Par
Michael Johnson	45	66	80	Exellent
Sophia				At Par
James				At Par
Olivia M				Exellent
Daniel				Exellent

Lisa Brown EXT 103
Smile Dental Practice

We Scored 77 calls attended by Lisa Brown in the last 30 days

90
Avg Performance Score

80
Avg Patient Happiness Score

Call Sentiment
😀 Positive	74
😐 Neutral	18
😠 Negative	08

Optimizing Agent Performance with VoiceStack

2. Auto-Answer

VoiceStack provides an automated voice response bot called VoiceBot, which can automatically answer a call for the agent. This means that the agent doesn't need to manually answer every call, and becomes particularly useful during peak hours and offline hours. This also helps the agent to remain focused on the current caller, knowing that the new call is being taken care of.

3. Auto-generated AI Tasks

After every phone call, VoiceStack's AI analyzes the call, and automatically suggests a set of AI-generated follow-up tasks to the agent based on the call summary and outcome.

> "
> *VoiceStack enabled us to connect with 99% of our patients by optimizing missed calls and significantly improving call answering rates.*
>
> **Himesh Kana**
> Dental Depot of TX

Optimizing Agent Performance with VoiceStack

4. Integration with CareStack

VoiceStack is deeply integrated into CareStack, the leading practice management software in USA, UK and Australia, enabling agents to **quickly read and write patient information**, increasing efficiency by eliminating double entry of data and reducing data entry mistakes.

5. Call Pop

VoiceStack works with CareStack to also **pull patient information and display it** as soon as a call comes in. This helps agents build better relationships with existing patients, while handling new patient enquiries more effectively.

9:30 AM

Elisa VonRueden
Female · 33 yrs
North Erwin

Last Visit
12/05/2023

Visit Overdue

00:06
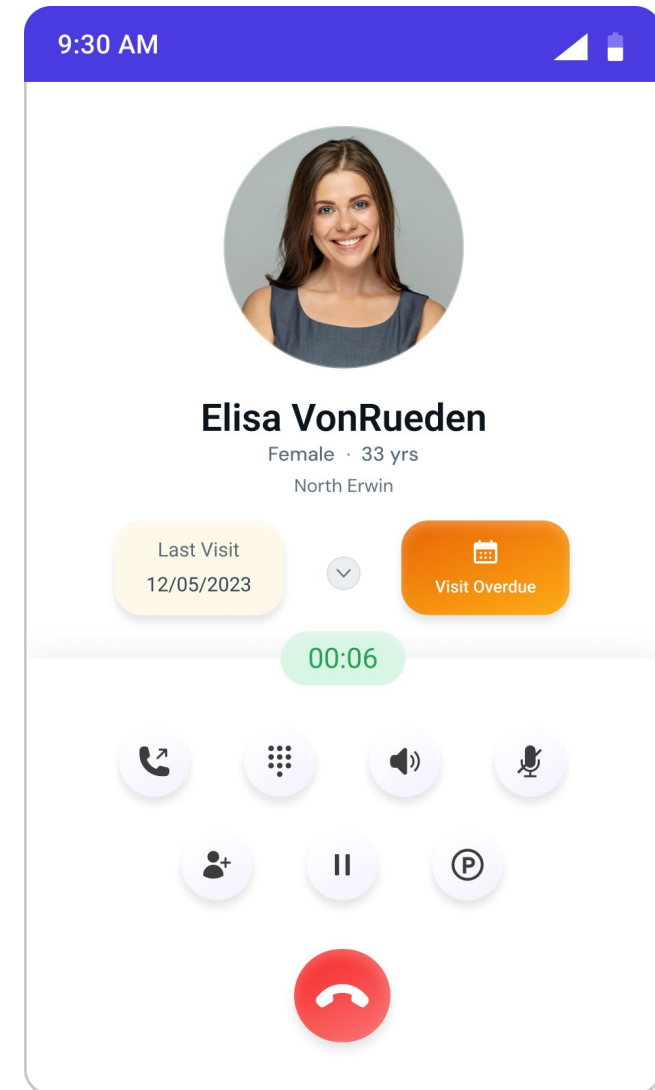
VoiceStack Benchmark Metrics

VoiceStack doesn't just streamline communications - it creates new capacity and recovers lost revenue that most practices never even realise they're missing. Whether your DSO has 5 offices or 50, these performance benchmarks show that VoiceStack scales with your requirements.

Metric	VoiceStack Benchmarks	Industry Average
Call Answer Rate	94 - 99%	~80%
Call Response Time	3 mins (down from 4+ hours)	30 - 60 min
Appointment Conversion Time	85%	53%
High-Value Treatment Booking Uplift	+34%	N/A
Time Saved per Call (Automation)	3 mins	0
Agent Productivity Gains	220 hrs/month	N/A

VoiceStack

Call Center Analytics with VoiceStack

Identifying and tracking essential KPIs such as Missed Call Rate, Call Conversion Rate, and High-Value Treatments Booking Rate is not just a data-collection exercise—it's a strategic initiative aimed at aligning operational excellence with patient-centered care.

With VoiceStack, DSOs can the **monitor** these KPIs using Real-time dashboards, AI-driven call transcripts, and automated follow-ups that provide the agility needed to adapt to dynamic patient demands and market conditions.

Finally, **optimization** is the natural progression from measurement and monitoring. Reducing missed calls and Converting a higher percentage of calls into booked appointments or high-value procedures demands training, targeted marketing, and a dedicated focus on patient education.
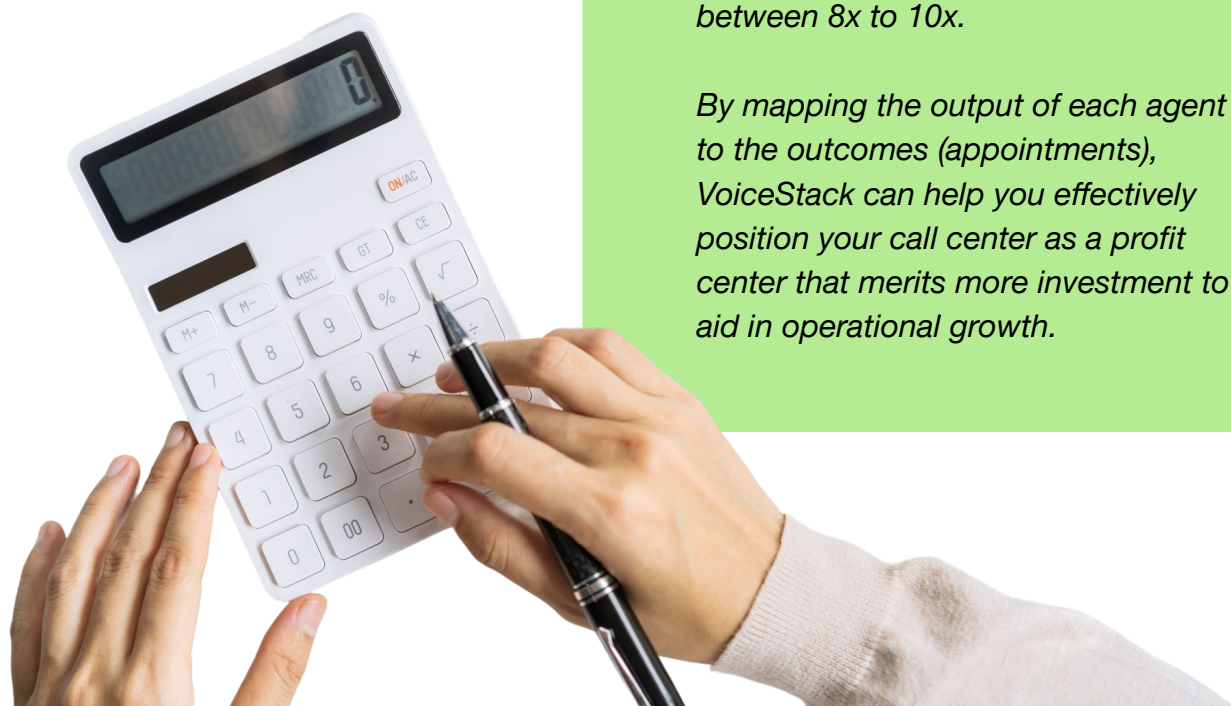
Calculating ROI

Assume Average Revenue per Appointment = $315

If an employee books 100 appointments per month, the resulting revenue is $31,500.

If the total cost of that employee (including salary, benefits, and incentives) is between $3,500 to $5,000, the expected ROI ranges between 8x to 10x.

By mapping the output of each agent to the outcomes (appointments), VoiceStack can help you effectively position your call center as a profit center that merits more investment to aid in operational growth.

Scaling your
Call Center Team

What are the best practices to be applied while scaling your DSO's call center operations?

How to Scale Your Call Center Team

1. Standardize and Document Processes

As you grow to 5, 10, 50 agents, possibly spread over multiple locations, having **consistent processes** is crucial. Create a playbook for your call handling – how to answer, how to verify patient info, escalation paths for various scenarios (clinical question vs. billing vs. emergency). This ensures a patient calling any office in your DSO gets a uniform, high-quality experience. It also makes training new hires faster and scaling to new sites easier.

2. Leverage Technology for Multi-Site Scaling

If your DSO operates regional call centers or a mix of centralized and in-clinic agents, a cloud platform like **VoiceStack** will tie everyone together. Make sure your software supports skills-based routing so that even if agents sit in different cities, calls route to the next available person with the right skills, seamlessly. Also, utilize collaboration tools like chat or video calling applications.

Standardize Every Touchpoint

- ❏ Identify the Caller
- ❏ Gathering Caller Info
- ❏ Greeting the Caller
- ❏ Understanding Call Purpose
- ❏ Handling Inquiries
- ❏ Providing Options
- ❏ Scheduling Appointments
- ❏ Managing Difficult Calls
- ❏ Closing Calls
- ❏ After-Call Documentation

How to Scale Your Call Center Team

3. Embrace Remote Agents (Carefully)

Remote agents can expand your talent pool (you're not limited to one city when hiring) and provide flexibility. To **manage remote teams effectively**, set clear expectations for availability and responsiveness, and use your analytics to monitor performance equally to on-site staff. Regular team video meetings and one-on-one check-ins help remote staff feel included. Security is another consideration (ensure remote connections to patient data are secure and GDPR-compliant).

4. Continuously Forecast and Hire Ahead

Scaling isn't a one-time task – you'll need to **continuously forecast** demand and add capacity proactively. It's far better to be slightly overstaffed for a month or two than to be caught scrambling and overwhelming your existing team. Signs that it's time include consistently long wait times, high occupancy, or rising abandonment rates – so use your data to predict when you'll need the next set of upgrades on people, processes and technology.

Many DSOs find a hybrid model works well in staffing: a core team in a central hub and additional remote agents who can scale up coverage as needed

59%

*As one report noted, **59% of center leaders say rising call volumes are getting harder to manage** and agent expectations are increasing at the same time*

How to Scale Your Call Center Team

5. Maintain Culture and Communication

Make it a point to communicate your mission to new team members – remind everyone that the call center isn't a silo, it's an integral part of your DSO's care continuum. Celebrate milestones collectively. When you're managing dozens of agents, also consider promoting some to **team leads or supervisors**. Team leads can handle day-to-day questions and monitoring, allowing the call center manager to stay strategic as the operation scales.

In short, **scaling your call centre is about replicating success without letting quality slip**. Use technology to connect multi-site and remote teams, hire ahead of demand, and invest in leadership structure as the headcount grows. With these in place, your call center can expand from a small team to a large, multi-location operation that consistently delivers great patient experiences.

> "
>
> *Train people well enough so they can leave, treat them well enough so they don't want to."*
>
> *- Sir Richard Branson*

Using Outsourcing Effectively

Outsourcing – hiring a third-party service to handle calls – can be attractive, especially if you're struggling with staffing or aiming to extend hours. Many large healthcare providers use outsourcing for after-hours or overflow. But is it right for you?

Reducing Costs

You need to compare your **fully-loaded internal cost** (agent wages + benefits + overhead per hour) to the vendor's rates. Outsourcers typically charge by the hour or per call.

For example, an outsourcing vendor contract may start around **$20 per hour for <50 agents**, with maybe a ~25% discount at a very large scale. If your in-house cost per agent hour is less than that, pure cost savings might not materialise.

Also, outsourcing companies need to make a profit, so if they offer a seemingly low rate, confirm what's included (you might get junior agents or limited training at bargain rates).

When selecting an outsourcing destination, consider factors such as language proficiency, cultural alignment, time zone compatibility, and cost- effectiveness. Popular call centre destinations for US businesses include:

- India
- The Philippines
- Poland
- South Africa
- Egypt
- Jamaica

VoiceStack

Improving Quality

If your goal is to improve quality, first understand **why your quality is lacking**.

Is it an internal issue that you could fix with better training or tech? Before outsourcing to improve quality, consider whether agents' workloads can be reduced by other means – such as customer self-service. Often, companies think an outsourcing vendor's polished operations will fix issues, but if the core problem is, say, your systems or policies, an outsourcer will struggle with them too.

At times, many issues could be fixed with some website development or product investment, not an outsourcing contract. So exhaust simpler fixes first (e.g., add an online scheduling tool, hire one supervisor to tighten QA) before handing the reins to someone else.

Data Security and Compliance

Handling sensitive patient information requires strict adherence to data protection regulations. Ensure that your outsourcing partner has strict security measures and continuous staff training processes in place to maintain compliance and protect patient data.

After Hours / Surge Coverage

Selecting an outsourcing partner in a distant time zone can help in after hours coverage. Keep in mind though that they may need extra training on cultural sensitivity, language proficiency and business context, to better relate with your business requirements.

Outsourcing can be beneficial in scenarios like: you need **after-hours coverage** and can't staff it yourself, you have **seasonal surges** (e.g., a big promo campaign) and want temporary extra agents, or you want to offer bilingual support that your team lacks.

Some DSOs outsource just the call overflow that can't be answered in 30 seconds, to ensure no caller waits too long – essentially a safety valve for peak times.

Choosing the Right Outsourcing Partner

If you decide to explore outsourcing, treat it like hiring a crucial employee. You'll want to evaluate potential partners on several factors: their experience with healthcare/dental clients, agents' training/tenure, technology compatibility (can they integrate with your systems for scheduling or will they just send messages?), and of course cost structure.

Onshore vs. Offshore

Outsourcing no longer automatically means sending calls overseas. There are many U.S.-based or nearshore (e.g., Latin America) outsourcing firms, as well as hybrid models. Onshore tends to cost more but may provide closer cultural alignment and easier compliance with regulations.

- Ask for **references and performance metrics** from any vendor. For example, what is their average hold time and FCR for similar clients? How do they handle escalation back to you for issues they cannot resolve?

- Clarify **scope** – Will they do only basic appointment booking and message taking, or handle insurance verification, etc.? The clearer you define what you expect, the better an outsourcer can meet it.

Managing an Outsourcing Relationship

If you outsource, you must **manage that relationship actively**, and ideally have someone on your team who *"speaks the outsourcer's language."*

- Outsourcers often operate large centres in competitive locations, where their agents have high turnover too. You might notice the person handling your calls changes frequently. To mitigate issues, establish **regular review meetings**.

- Plan out the **handoff points**. If the outsourced team handles after-hours, make sure there's a clear process for passing urgent cases to your on-call staff or scheduling follow-ups. If they handle overflow, decide how they will log information (perhaps directly in your system or via email summaries).

- Measure the outsourcer's performance and hold them accountable. **Establish SLAs** (Service Level Agreements) for things like answer time, abandonment rate, and accuracy of information captured.

VoiceStack
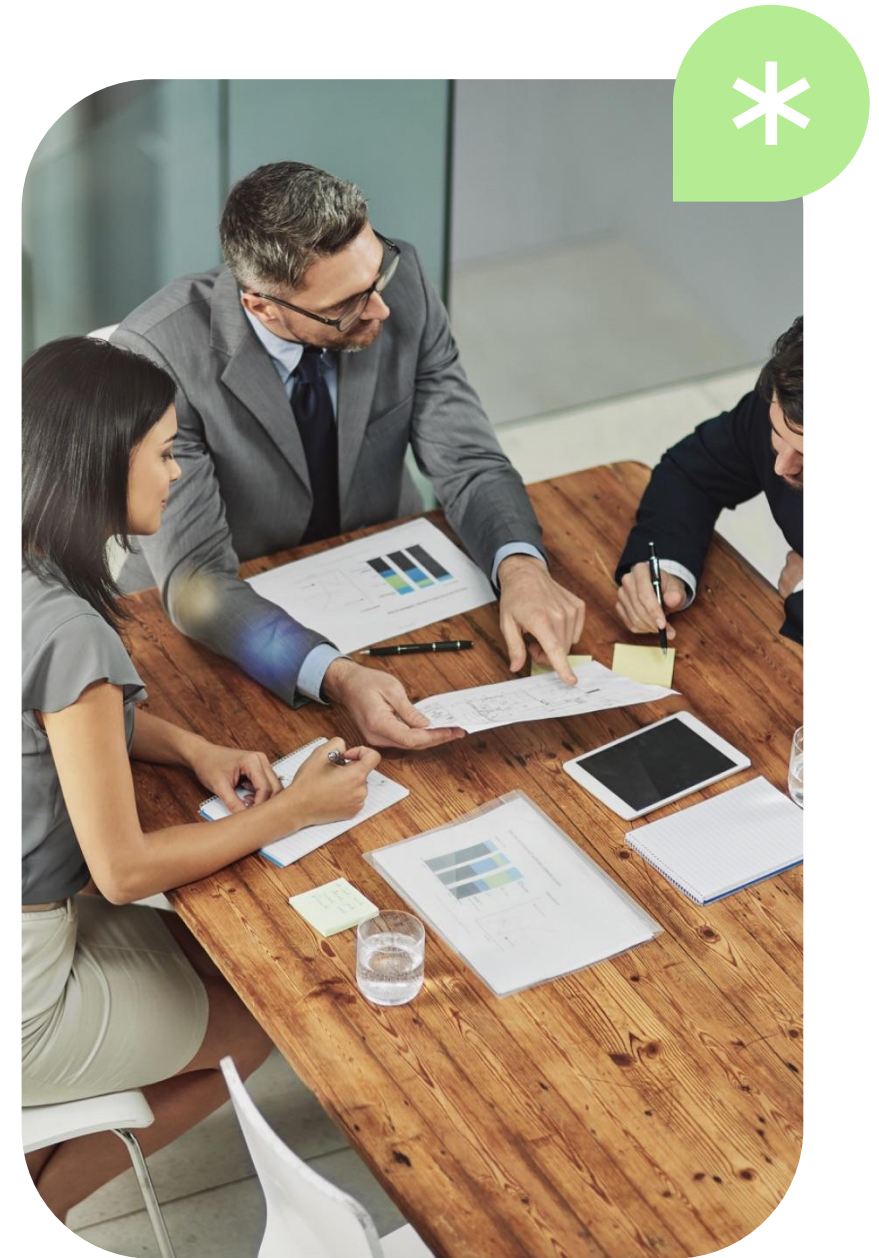
Conclusion

As we discussed, there are some common themes that all DSO operators should focus on while building and scaling call centers.

Closing Notes

Invest in People and Culture

Despite all the tech trends, your agents remain the heart of your contact center. Hire for empathy and problem-solving, train them well, and create a supportive environment that fights burnout. Happy agents lead to happy patients.

Plan and Optimize Operations

Use data to staff properly and design efficient workflows. Map out your call flows, build capacity models, and continually adjust. Measure things like AHT, abandonment, FCR, and CSAT, and celebrate improvements.

Leverage Technology (Cloud and AI)

Modernize your toolset by moving to cloud-based contact center software and integrating it with your DSO's systems. This not only improves reliability and access (critical if you have multiple sites or remote staff) , but also opens the door to AI features. Use AI assistants to handle routine inquiries and peak times, and AI analytics to continuously improve service.

Patient Experience is King

Always frame your call center decisions around patient experience. A smoother phone journey (quick answer, one-call resolution, friendly interaction) directly translates to patient retention and treatment acceptance. Every initiative – be it training, a new chatbot, or extended hours – should answer "How does this make things better for our patients?" If you do that, the revenue will follow.

VoiceStack is the Right Choice for Your DSO

"VoiceStack keeps our team perfectly aligned, ensuring that no patient communication falls through the cracks."

Tim Otto
CEO, Kids Tooth Team

"We have managed to reactivate $100,000 worth of treatment in 30 days. It's revolutionary!"

Stuart McGuiggan
CFO, Star Dental Institute

Increase in New Patient Growth
15%

Missed Opportunities Converted
41%

Estimated Additional Revenue
$105,000 in 90 days

Himesh Kana
CEO, Star Dental Institute

Conversion rate from first-time inquiries
84%

Call Answer Rate
90%

Estimated Additional Revenue
$78,000 in 30 days

Katie Post
CEO, Northwest Dental Group

VoiceStack

Closing Notes

As DSOs continue to expand and compete, those that master the call centre will have an edge. For ambitious DSOs, the gains from a data-focused, technology-enhanced approach can be transformative. Missed call rates can plummet, conversions can soar, and operational efficiency can reach new heights.

Whether a DSO operates a single location or multiple sites across different regions, the principles remain the same:

- Track the **Right KPIs**

- Leverage **Advanced Tools** to monitor in real time

- Invest in **Continuous Improvement** strategies

We're now in Q2 of 2025 — a time of shifting markets, tight labor, and rising expectations. In the midst of it all, we created this playbook to support you in navigating the challenges and unlocking new opportunities to grow your DSO call center. We hope it gives you clarity, inspiration, and practical tools. And remember, if you ever need a hand or a fresh perspective, we're just a message away — always happy to help!

- Traci & Dan

VoiceStack

About the Authors

Traci Nervo
VP - Operations, VoiceStack

Traci Nervo is a seasoned professional in the dental industry with over two decades of experience. She is the Founder & CEO of Dental Executive Consulting, and also serves as the Vice President of Operations at VoiceStack. Previously, she served as the EVP at 4M Dental Implant Center, a multi-location practice specializing in dental implants and restorative dentistry across Southern California and Nevada. She was responsible for building, centralizing and scaling 4M's call centre operations for all of their locations

Traci is also a mentor with Women In DSO®, an organization dedicated to empowering women leaders in the dental service organization sector.

Dan Hall
VP Sales - CareStack

Dan Hall serves as the Vice President of Sales at CareStack, a comprehensive dental practice management platform. With nearly two decades of experience, he has dedicated his career to assisting dental offices in leveraging technology to optimize workflows and enhance patient care.

In his current role, Dan focuses on forging new connections and partnerships, aiming to expand CareStack's community of users. He is also a contributor to CareStack's resource center, sharing insights on topics such as maximizing return on investment in dental practices and strategies for attracting and retaining Gen-Z patients..

VoiceStack

Need help in Setting up Your Call Center?

We can help you identify the right set of people, processes and technology to create the foundation of your call centre. Contact our team today to kickstart your call centre operations.

www.voicestack.com

Traci Nervo

tracinervo@voicestack.com

714-425-7998

Dan Hall

dhall@carestack.com

651-357-8362