

# Virtual Receptionist vs. Virtual Assistant

What's the difference and how to get the most of out each

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your receptionist





## What are we covering today?

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- What are Virtual Receptionists & Virtual Assistants
- What is the difference between the two
- 5 Tips to get the most out of your Virtual Assistant (VA)
- 5 Tips to get the most out of your Virtual Receptionist (VR)
- Live Q & A

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# What are Virtual Assistants

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A Virtual Assistant is a remote based team member you hire to help with specialized tasks within your clinic

They should always have some expertise in the area that you need help with.

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The main purpose of a VA is to help you better balance your time by helping take care of highly specialized and time consuming tasks.





## What can a VA help with?

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- Labs
- Blogging
- Newsletters
- Direct Billing
- Website Builds
- Email Management
- Social Media Management
- SEO/Advertising Campaigns



# What are Virtual Receptionists

A Virtual Receptionist (VR) is generally a team member or service you hire to help manage your incoming calls.

They specialize in customer service and bookings over the phone.

## Main Purpose...

of a VR is to improve your clinics ability to answer the phone, help clients with questions and manage appointments.







## What can a VR Help with?

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- FAQ's
- Call outs
- Manage Bookings
- Waitlist Management
- Transfer and direct calls
- Cancellations & Rescheduling
- Consistent & Reliable Front Desk Staff



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# What's the Difference?

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## Virtual Assistants...

are better suited for helping you with your highly specialized needs. They will give you expertise on how to maintain and develop workflows for complex tasks in your clinic.

## Virtual Receptionists...

- focus is on the front lines. They are your customer service team managing your daily call flow and ensuring you book appointments while you're in appointments.
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## 5 tips to get the most out of a VA



- Be Specific
- Set Expectations
- Create a Scope of Work
- Set a Project/Task Limit
- Portfolio Check



# Be Specific, Set Expectations & Create a Scope of Work

## All of these tie together...

because they set the tone and give a clear definition of what work will be completed, the results of that work and in what time frame.

## Do...

say “I need to increase my instagram profile by adding 100 actively engaged users to my following over the next 90 days.” OR “I need 5 email templates designed & built for my monthly newsletter in 30 days.”

## Do not...

say “I need you to increase my social media following” OR “I need a monthly email newsletter setup”





# Project Limit & Portfolio Check

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## 3 Projects per Quarter

This is a good rule of thumb to ensure each and every project is completed and nothing slips through the cracks.

## Portfolio Check

This may be the most important part of your VA search. You'll want to see some real examples of completed work. This will solidify that they do what they say and that they know what they're doing.

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## Where can you find a VA?

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Fiverr and Upwork are great options for finding project based VA's that can help you accomplish a specific task.

The Ginger Agency is also great option for ND's and wellness practitioners who need specialized ongoing VA support to handle things like email, direct billing or labs.

The Fiverr logo, featuring the word "fiverr." in a bold, dark grey sans-serif font, with a green dot at the end of the period.The Ginger Agency logo, featuring the word "Ginger" in a red script font, with "AGENCY" in a smaller, red, all-caps sans-serif font below it.The Upwork logo, featuring the word "upwork" in a bold, green, lowercase sans-serif font, with a small "TM" trademark symbol at the top right.

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## 5 Tips to get the most out of a VR

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1. Keep it Simple
2. Structure
3. Communication
4. Know your Phone System
5. Cost Analysis





# Keep it Simple with Structure.

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## Simplicity

The main purpose of your VR is to answer the phone, help with questions and book appointments. For your customers sake it shouldn't be any more complicated than that.

## Structure

Call instructions for a VR need to be structured in a way that makes it easy to help the patient. The VR must be able to confidently navigate the booking rules quickly in any situation.



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# Communication

This is the single most important thing you can do to have a successful VR who adds value to your practice.

A VR who knows about vacations, sick leave or the new practitioner who just came onboard for example will be far more valuable than one who is in the dark guessing what to tell your patients.

- Your Receptionist is the first contact with your clients, they always need to be in the know.



# Cost Analysis

Is a Virtual Receptionist cost effective for your clinic?

## Doing the math...

The simplest way to determine a rough estimate of your costs look like this:

1. How many calls/day do you receive?
2. How many days of the week do you need coverage?
3. Add those together & multiply by 4 to get a rough estimate for number of calls per month

## Call lengths...

1. New patient booking calls - **5 mins avg**
2. Existing patient booking calls - **4 mins avg**
3. Non booking calls - **3 mins avg**

## COST COMPARISON

*In House Reception vs. Virtual Reception*

### IN HOUSE

**3200\$/MONTH**

40 hour work week  
20\$/hour  
coverage from 9-5pm M-F  
15 Calls/day answered

### VIRTUAL RECEPTION SERVICE

**1589\$/MONTH**

15 calls/day handled  
70 hours of coverage/week

### MUCH MORE COST EFFECTIVE

**50% SAVINGS**

With this amount of savings you could hire someone part time to take on bigger projects you need help with and never worry that your customers aren't being taken care of.

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First time client call that is 5 minutes, costs 8.45\$

Avg cost for a 60 min Massage in Canada is 100\$

Avg number of massages a person gets/year is 3.5

Potential missed profit from that first call is 341.55\$

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## Cost Analysis...

### What to look for

**Pay per usage Model:** always double check how the VR talk time is broken down and billed.

**Contract terms and conditions:** As we know from this past year things change quickly so you'll want an option to cancel or put things on hold without a huge fee.

**Hidden fees:** wrap up time, holiday fees, tech fees, service fees etc... you will always want to ask about these before hand in order to add them in to your cost analysis to avoid sticker shock.



# Thank You

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