

How To Best Use Your Client Advocate



The Old - Client Perspective

- ❑ Connecting with the same PCC support member could have been challenging at times
- ❑ Keeping track of a large stack of outstanding issues could be difficult, as a different person at PCC could be working on each
- ❑ Forming personal connections could also be difficult due to the infrequency in which you would reach the same person



The Old - PCC Perspective

- ❑ All PCC support members rotated answering phone calls each day
- ❑ Having extensive familiarity with 180+ offices could be challenging at times
- ❑ Prioritizing issues on an office-to-office basis was challenging due to the number of support members working with each office
- ❑ Multiple people working on the same issue resulted in “stepping on toes”



The New

- ❑ Offices have direct extensions to reach their Client Advocates (CAs)
- ❑ If CAs happen to be unavailable, we have a dedicated team of three that answers the phone all day, everyday
 - ❑ This team is called the Rapid-Response Team
- ❑ Scheduled phone calls with CAs allows for involved one-on-one time to solve and/or prioritize your issues
- ❑ The Rapid-Response Team allows you to get your day-to-day issues resolved in a timely manner



Why the switch?

- ❑ Create a more personalized and meaningful experience with your practice
- ❑ Foster a better understanding of the issues that you face day-to-day and month-to-month
- ❑ Make our support less reactive and more forward thinking
- ❑ Ensure that your office is maximizing the use of our software and services and is current with the new functionality
- ❑ Work collaboratively so that you know we're invested in your success



Let's Take a Moment

Please state the following:

Name

The State in which your practice resides

Team color

Client Advocate



Get To Know Your CA

- ❑ People typically work better with one another when they know more about each other
- ❑ The better we get to know you, the better we can help your practice succeed
- ❑ Getting a sense of your priorities can be difficult without truly knowing your goals and pain points



Getting Started

- ❑ If you don't already have a call schedule set up, contact support and ask to get in touch with your CA
- ❑ If you aren't aware of your CA, simply contact support and ask for the Team Lead for your team color (Blue, Red, or Green)
- ❑ If you aren't aware of your team color, contact support and we'll be able to let you know!



Setting up a Call Schedule

- ❑ When speaking with your CA, you'll want to set up a call schedule that works conveniently for you
- ❑ Call schedules are typically either weekly, bimonthly, or monthly
- ❑ You have complete control of the call schedule!
- ❑ Working on too many projects at once? Maybe increase the frequency of your calls!
- ❑ Can't find anything to work on? Consider making your weekly schedule a bimonthly schedule
- ❑ These calls are meant to be convenient for you!



Prioritizing

- What issues are most important to you?
- Help us prioritize which issues you'd like resolved first
- By letting us know what's most important, we get a sense of where your priorities lie



Optimization

- Are you using all of our features and products?
- Tell us what issues your practice struggles with most
 - Struggling with family outreach?
 - The Patient Portal
 - Patient Notification Center
 - Trying to modernize your practice and transition to the world of telemedicine
 - The Patient Portal
 - PocketPCC
 - Spending too much time posting insurance payments?
 - Are you receiving ERAs for your major payers in autopip?



Regular Updates

- ❑ PCC typically has a release every 8 weeks
- ❑ We understand that you may be busy and unable to attend weblabs
- ❑ Ask your CA for a quick run through of some material around the time of the update
- ❑ If a CA is aware of your priorities, they can make sure to highlight the features that will impact your practice the most



Storytime!

Any success stories with your CA?

Frustrations?



Resources at PCC

- ❑ While your CA will be able to answer and solve most issues with your software, these are not the only problems that plague your office
- ❑ We have certified practice managers, certified professional coders, experts on PCMH and MU, and more, all under the same roof here at PCC!
- ❑ If your CA isn't able to answer your question, I'm absolutely sure that they can find someone that can
- ❑ Not only can we get your questions answered, but we can set up times to get either you or your staff trained on particular subjects



Teamwork Makes the Dreamwork

- ❑ While we try our best on support to have a full knowledge base of all of our products, not all of us can be Randy!
- ❑ Our support team is comprised of three colored account teams (Blue, Red, and Green), all of which sit near each other and meet daily
- ❑ Questions that we're unable to answer can easily be crowd-sourced to the rest of the team
- ❑ Think of us as a brain-trust!



To Summarize

- ❑ PCC would like our offices to have a more personalized and holistic support experience
- ❑ Set up a call schedule with your CA!
- ❑ Help us prioritize your issues and focus on your pain points
- ❑ We have a ton of resources here at PCC that can help your practice overcome both short-term and long-term challenges
- ❑ Direct contact with a CA opens up a whole realm of knowledge that you have easy access to



Questions? Feedback?

