



# PROVEN TIPS TO BUILD AND IMPLEMENT AN EFFECTIVE PHONE SCRIPT FOR YOUR PRACTICE

*Patients are calling. Is your staff fully equipped to handle any scheduling conversation?*

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# TABLE OF CONTENTS

## 04 ▶ 5 ESSENTIAL STEPS TO BUILD A PHONE SCRIPT

04 ▶ STEP 01: GREETING THE PATIENT

05 ▶ STEP 02: GUIDING THE PATIENT TO THE APPOINTMENT

06 ▶ STEP 03: SETTING EXPECTATIONS FOR THE VISIT

06 ▶ STEP 04: CONFIRMING CONTACT INFORMATION

07 ▶ STEP 05: LEAVING VOICEMAILS

## 08 ▶ THE IMPORTANCE OF ONGOING PRACTICE

## 09 ▶ PUTTING IT ALL TOGETHER: PHONE SCRIPT



Most often, a patient's first interaction with your practice occurs over the phone. On that call, he or she is actively building an impression of your office that directly correlates with whether he or she will schedule an appointment with your team.

The challenge that occurs in most practices is a lack of preparation on that initial call. Likely, the staff member who picked up the phone does not solely focus on answering phone calls. He or she may have just been checking in a patient, handling a billing concern, ironing out a calendar conflict, and answering a patient's insurance inquiry. When the phone suddenly rings, the staff member is presumably caught off guard

and handles that call with minimal to no prior preparation.

At [Call Box](#), we like to combat this common preparedness challenge by encouraging our clients to build a custom phone script that is unique to their needs. We understand that not every practice is the same; services offered, geography, patient demographics, calendar availability, and more can all have a significant impact on a practice's phone script. However, the more valuable tools and resources you can offer your phone handlers, the better equipped they will become at expertly and confidently handling patient calls. This translates to a more consistent, positive phone experience for your patients that results in greater appointment conversions.

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## 5

## ESSENTIAL STEPS TO BUILD A PHONE SCRIPT

As you build out your practice's phone script, it's important to keep a few key components in mind. Below you'll find Call Box's five essential steps for creating an effective phone script that is unique to your practice:

- 1 *Greeting the patient*
- 2 *Guiding the patient to the appointment*
- 3 *Setting expectations for the visit*
- 4 *Confirming contact information*
- 5 *Leaving a voicemail*



## STEP 01

### GREETING THE PATIENT

The initial greeting of a patient on the phone is crucial to set the stage for the experience he or she expects to have with your practice. If your staff answers the phone with a cold *"Hello?"* or *"Please hold,"* the patient is unlikely to feel like a priority to your team and may assume that's the same experience he or she will also have in person.

Call Box recommends taking the approach of stating the staff member's and practice's names, and warmly asking how he or she can help. This typically looks like: *"Good morning! This is Matthew with ABC Health. How can I help you?"*

This greeting checks a few essential boxes:

- Stating the staff member's name immediately creates a personal connection by putting a name to the voice.
- Stating the practice's name confirms to the patient that he or she has reached the correct practice location.
- Asking how the staff member can help the patient builds rapport and gives the patient an opening to explain his or her reason for calling to be quickly assisted.

If a patient must be placed on hold for any reason, ensure that it is a brief hold. Patients tend to have little to no tolerance for long hold times. Call Box has found that a majority

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of patients will hang up the phone after only 30 seconds while waiting on hold. It's also important to ask the patient if he or she can be placed on hold; doing so confirms the call is not an emergency and properly prepares the patient for the impending wait.

Such a greeting could look like: *"Good morning! This is Matthew with ABC Health. May I place you on a brief hold?"*

Before diving into the conversation, be sure to capture the patient's name. This allows your staff to build trust and rapport by using the patient's name in the conversation. A simple, *"Who do I have the pleasure of speaking with?"* goes a long way in building an immediate connection with the patient.

The initial greeting is arguably the most essential portion of any call. Ensure your staff members have mastered their greetings and provide a consistent, exceptional first impression of your practice.



## STEP 02

### **GUIDING THE PATIENT TO THE APPOINTMENT**

It's important to remember that the only way your team can truly help your patients is by getting them in the office for the care they need. Most patient phone calls present an opportunity to either schedule a new appointment or confirm an existing appointment.

When guiding a patient to an appointment,

take the time to carefully answer any question the patient asks, and then guide the patient to the next step of the booking process by asking a question in return. For example, when a patient asks a pricing or insurance question, your staff should comprehensively answer the inquiry, and then ask, *"Have you been to our practice previously?"*

Furthermore, asking questions that guide the patient to the next step of the booking process allows staff to lead the conversation. Most patients call healthcare practices a few times a year, at most. Patients often ask questions simply because they aren't familiar with the booking process and are not sure what to ask or expect. Your staff, by contrast, handles hundreds of scheduling calls each week. They understand the process and can best assist patients by taking the lead during the conversation.

Another recommended method developed by Call Box to help guide patients to a specific appointment time is the "Whittle and Shepherd Technique." This involves offering two increasingly specific options on the calendar to best fit the patient's schedule. Your staff will ask A/B question to avoid the patient needing to mentally shuffle through his or her schedule and direct him or her to the best appointment option.

For example: *"Does earlier or later in the week work better for you? Earlier? Great, do mornings or afternoons work better for you? Afternoons? We have openings next week Monday at 2 p.m. and 4:15 p.m. Which works best for you?"*

It's important to keep in mind that, as the scheduling experts, your staff members offer the most help to your patients when they are able to take charge of the conversation and guide the patient to the appointment.





## STEP 03

### SETTING EXPECTATIONS FOR THE VISIT

What documents should a patient bring to his or her appointment? Should the patient arrive early to the appointment? How long should a patient expect his or her appointment to take? What is the parking like at your office? Does your practice have a play area for children?

These are all valid inquiries your patients may have leading up to an appointment. It's important your staff takes time in every scheduling conversation to set expectations for a patient's visit. Not only does this ease the minds of nervous patients, but it also helps set your practice apart by detailing

what makes your office unique. Whether it's valet parking or specialist consults during the initial appointment, staff should prepare your patients and ensure your practice is put in the best possible light.



## STEP 04

### CONFIRMING CONTACT INFORMATION

While your staff has the patient on the phone, it's important to confirm the contact information you have on file. Whether for appointment reminders, post-care calls, billing purposes, or monthly newsletters, there are many reasons your team may need to get in touch with your patients. This can be naturally added to the end of the conversation.

For example: *“While I have you on the phone, is your best contact number still 214-555-1000, and best email mattc@callbox.com? We’ll be sure to send you a reminder a few days before your appointment.”*

Furthermore, if your staff is unable to meet the patient’s needs on the call and schedule an appointment on the spot, capturing his or her best contact information allows the opportunity to reach out at a later time. In doing so, staff is able to verify he or she was helped with his or her reason for calling and, if not, offer an appointment again to meet the patient’s needs.

An example of such an ask could look like: *“Would it be alright if I followed up with you next week to see if we can meet your needs? What day would be best?”*

Securing a patient’s contact information is essential for future outreach – whether staff has booked the appointment or not. Ensure this is made a priority on every call.



## STEP 05


### LEAVING VOICEMAILS

No matter how great your practice is on the phone, inevitably there will be calls that slip through the cracks – patients will hang up waiting on hold, staff will fumble handling objections, or any other number of reasons. It’s essential to have a strict follow-up process in place for reaching out to any patient who was not helped on his or her initial call.

Often, reaching out to patients is a foreign concept for staff. They’re accustomed to patients calling the office, but not proactively making a call. Even more foreign is the idea of leaving a voicemail. Staff members typically prepare for the conversation with the patient, but when they hit voicemail, they stumble as they were not prepared to leave a message. There are a few pieces of a voicemail that are important to keep in mind:

- **Clearly state the staff member’s name and practice’s name.** This immediately lets the patient know who is calling and from where, and allows the patient to differentiate the call from the multitude of spam calls he or she likely receives.
- **State the reason for calling.** Have the staff member acknowledge that he or she is reaching out to follow up on a recent conversation where the patient wasn’t helped. Let the patient know he or she wants to ensure the patient’s needs have been met.
- **Provide a call back number.** Ideally, the staff member who left the voicemail should provide a direct number back to him or her. This makes a more consistent experience for the patient and avoids potential confusion.
- **Set expectations for next steps.** Whether your staff plans to reach back out to the patient or asks the patient to call back, set clear expectations for what will happen after the voicemail is left.

Voicemails are an effective way to recapture otherwise lost revenue. Ensure your practice has a healthy outbound process in place and your staff is well-equipped with sample scripting, whether they reach the patient or leave a voicemail.



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## THE IMPORTANCE OF ONGOING PRACTICE

No one likes to be on the receiving end of a fully scripted call. It can feel cold, unnatural, and even frustrating at times. It's important to have your staff practice common scripts to a point where it becomes comfortable and natural. While it's fine, and even recommended, to have a checklist or sample script next to phone handlers, they should not read straight from the script; it should simply serve as a reminder of best practices to ensure the patient receives an optimal experience.

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### ROLE PLAYS

One recommended type of ongoing practice is role plays. Take time each week to sit down with your team and run through common scenarios they come across on calls. Ensure they are hitting the critical pieces of your provided script, yet sound natural and are able to pivot off script when required. Often, role plays are best conducted as a team to allow your staff to hear a few different phone handling styles and gather tips from other colleagues.

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### LISTENING TO CALLS

Another recommended method of practice is listening to phone calls. Sit down with staff members individually to walk through what was done well on each call, as well as areas of improvement. Note where the individual may have veered off script or even forgotten important pieces of the script. Also take notice of the individual's tone and ability to naturally leverage the provided script on patient calls.

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### FEEDBACK LOOP

It's important to develop a system of continuous feedback to monitor your staff and provide methods of ongoing improvement. Without continuous feedback, it's easy to slip back into old habits. Ensure your staff is providing patients with a consistent, positive experience on the phone – each and every time.



## PUTTING IT ALL TOGETHER

Below you'll find a sample script that implements each of the five previously discussed steps to develop a comprehensive outline for your staff to follow and become comfortable with.

### GREET THE PATIENT

- ☐ **Identify yourself and your practice:**  
*"Good morning! This is [insert first name] with [insert practice name]. How can I help you?"*
- ☐ **Refer to the caller by name:**  
*"Who do I have the pleasure of speaking with?"*

### GUIDE THE PATIENT TO THE APPOINTMENT

- ☐ **Answer a question. Ask a question:**  
After comprehensively answering a patient's question, ask a question that guides the patient to the next step of the booking process. This allows you to stay in control of the conversation and lead the patient to the appointment.
- ☐ **Utilize the "Whittle and Shepherd Technique" to secure a firm appointment:**  
*Does earlier or later in the week work better for you? Earlier? Great, do mornings or afternoons work better for you? Afternoons? We have openings next week Monday at 2 p.m. and 4:15 p.m. Which works best for you?*

### SET EXPECTATIONS FOR THE VISIT

- ☐ ***When you book an appointment, be sure to let the patient know what to expect upon arrival:***

*"We have you down for [insert time] on [insert day]. Be sure to arrive 15 minutes early to complete initial paperwork. You'll need your ID and insurance card with you. Your appointment should take about [insert number] minutes. We have ample free parking in the lot out front and free coffee available."*

### CONFIRM CONTACT INFORMATION

- ☐ ***Confirm the best call back number:***  
*"While I have you on the phone, is your best contact number still [insert phone number], and best email [insert email]? We'll be sure to send you a reminder a few days before your appointment."*

- ☐ ***If you are unable to schedule an appointment, set expectations for a follow-up call:***  
*"Would it be alright if I followed up with you next week to see if we can meet your needs? What day would be best?"*

### LEAVE A VOICEMAIL

- ☐ ***When following up with patients, leave a voicemail that offers clear, concise information and instructions for next steps:***

*"Hi, this is [insert name] from [insert practice name]. I know you called in earlier and we weren't able to meet your needs. I'm reaching back out to answer any questions and schedule a consultation or appointment as needed. You can reach me at [insert phone number]. I look forward to hearing from you!"*

### LEARN MORE

Call Box works with more than 5,000 healthcare practices to enhance phone handling and gain complete insight into their patient calls. If you'd like to learn additional tips for providing patients with an optimal phone experience and how Call Box can help your practice develop proven phone processes, visit [callbox.com](https://callbox.com) or call 833-951-0539.