

# FRONT DESK CHECKLIST

FOR BOOKING SUCCESS



## WELCOME THE CALLER

- ☐ Answer the phone with a smile.
- ☐ Start with a friendly and professional greeting.
- ☐ Introduce yourself and the practice.
- ☐ Write down the caller's name.



**REMEMBER:** Repeat back the caller's name throughout the conversation.



## EXTEND AN INVITATION

- ☐ Ask for the appointment on every call!
- ☐ Find out caller's best availability.
- ☐ Offer two times for an appointment.
- ☐ Utilize the "whittle and shepherd" method to narrow down an appointment time.



**FACT:** Offering two specific times increases your odds of booking an appointment by more than 40%.



## INQUIRY & OVERCOME

- ☐ Ask the patient's reason for calling.
- ☐ Rather than quoting price:

- Offer a free consultation.
- Provide financing options like Care Credit or cash discounts, and help file claims with insurance.
- Confidently explain the value of service.
- Guide toward the appointment.



## COLLECT CALLER INFORMATION

- ☐ Collect important information to contact the patient.
- ☐ Ask the best way to reach him or her.
- ☐ Confirm the appointment date and time.



## SET EXPECTATIONS

- ☐ Explain how long the appointment will take.
- ☐ Remind him or her of what time to arrive.
- ☐ Share which documents and materials are needed, as well as what paperwork they should expect.

