

## CONNECT

- ☐
- Identify yourself and your practice.

*Thank you for calling \_\_\_\_\_, this is \_\_\_\_\_. How may I help you?*

- ☐
- Collect the caller's information and refer to the caller by name.

Caller's Name \_\_\_\_\_ *"Who do I have the pleasure of speaking with?"*

Phone Number \_\_\_\_\_ *"In case we get disconnected, what's the best number to call you back at?"*

## REQUEST &amp; INVITE

- ☐
- Knowledgeably answer the caller's questions. Be prepared to answer questions about:

- Accepted insurances
- Cash discounts or payment plans
- Services offered in office
- Schedule availability for particular services
- Doctor availability
- Consultation / initial exam price
- Emergent care
- Address and hours

- ☐
- Ask if the caller would like to come in for an appointment.

When someone calls in just asking questions, he or she is likely looking to book an appointment. Ask the caller if he or she would like to schedule one.

- ☐
- Offer at least two different times for an appointment.

*"Is morning or afternoon better?"*

*"Morning, great!" I have an appointment available at 9:30 am Wednesday or 8:00 am Thursday. Which would you prefer?"*

## SET

- ☐
- When you book an appointment, be sure to set expectations for the visit.

*"We have you down for \_\_\_\_\_ on \_\_\_\_\_. Be sure to arrive 15 minutes early to complete initial paperwork. Your appointment should take about \_\_\_\_\_ minutes. Do you know where our office is located?"*

## PURSUE

- ☐
- Confirm the best call back number.

You should do this when you collect the patient's information. It will become particularly important when you are unable to book and would like to follow up.

- ☐
- When 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?"*