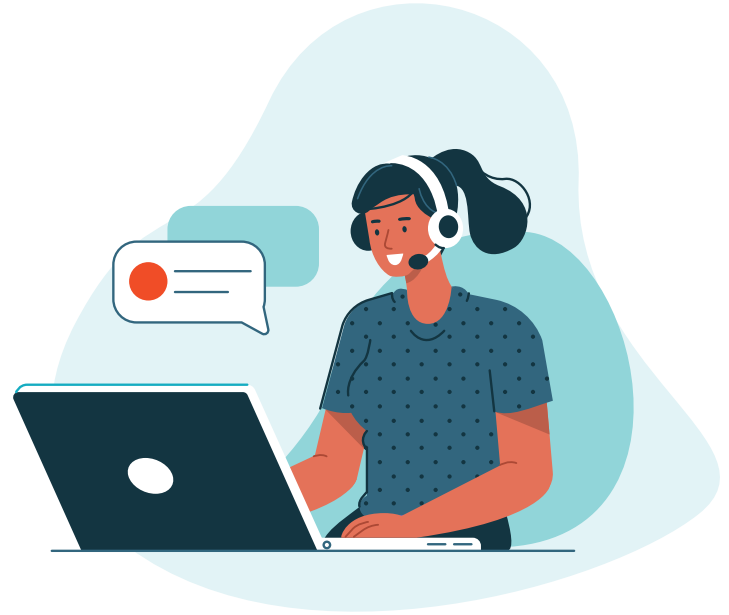




Phone Scripting Worksheet



Clarify Expectations

Who is first on phones? Who is second, third, fourth?

How many rings are acceptable/unacceptable?

Where is the phone script located? (For example, under each phone.)

Where is the tracking sheet stored?

Who fills it out?

How often will the script be reviewed, practiced?

How often will calls be recorded for positive and constructive feedback?

Type of Caller

Prospective Patient

Goal

Lead the conversation with questions

Practice

Greeting

Example: Thank you for calling Dr. Allen's office, this is Lori, how may I help you?

Response

Example: I can help you with that, thank you so much for calling our office. My name is Lori. Who is this?

Response

Example: Hi Sandra, it's nice to meet you. You definitely came to the right place. Are you new to the area?

Prepare

Take a deep breath, get ready to meet a new long-term loyal patient who refers many others to your practice. Think of some of your favorite patients who found you through an initial call.

Caller

Hi, I'm calling to see if you take my company's insurance plan?

Sandra

Yes, I moved here from Chicago. I'm calling to see if you take my company's insurance plan?

Practice

Work to build rapport, ask how the caller found your practice, answer the question, then ask a question.

Response

Absolutely, we accept your insurance plan. We will bill your claims for you, work to maximize your benefits, and monitor your payments to ensure your claims are processed correctly. Did you find our website?*

***If insurance plan is out-of-network:**

We are an out-of-network provider – it may or may not affect your co-pay. We will inform you of your payment portion and options before performing any dental procedures. Did you find our website?

OR

Yes, but on an unrestricted basis. We have many patients with your insurance who find they get good coverage even though we are not restricted by the insurance company's contract. (Other word choices in place of restricted like controlled, regulated, limited, or constrained.) Did you find our website?

Caller

Yes, I have your website up right now.

Practice

Refer to your Top 10 List.

Response

Example: Let me tell you about our office. Our patients are raving fans, as you can see from the reviews on our website. You will be seen on time, and involved in every aspect of your dental treatment. We are a modern dental facility offering the highest quality care to our patients for thirteen years. Sandra, what type of appointment are you looking for, a regular check-up, or something else?

Response

Example: Do you remember approximately when your last dental visit was?

Response

Example: OK, and what is the spelling of your last name?

Response

Of course, I'd be happy to request those for you. Our next available appointment time is this Thursday at 10:30am; or next Tuesday at 10:30am; which day works better in your schedule?

Caller

A regular check-up and cleaning.

About a year ago.

S-M-I-T-H, I just had x-rays taken elsewhere. Can you use those?

Collect pertinent data including email (new patient call slip available upon request)

Direct the patient to the website for forms

Give the patient directions to your office

Estimate fee for first visit, and confirm you will submit insurance claim

Confirm appointment time

Inquire about other family members

Ask the patient: "Anything else I can help you with?"

Prompt the Doctor to call the patient and welcome them to the practice to reduce potential no-shows

Notes

