

Phone Call Script

Answering the telephone in a dental practice is perhaps the most important element to maximum practice growth and patient retention. All of the marketing efforts, both internal and external, filter through the front desk and the initial phone call. Rapport and relationship building starts at this phone call and its importance cannot be emphasized enough.

The Basics:

First of all, it is important for the front desk team members to understand that it is not their role to “qualify” or filter the patients that schedule appointments in your office. Time and time again, we’ve seen scheduling coordinators attempting to fill the doctor’s schedule with only “ideal” patients. This is a huge mistake. Since the potential Lifetime Value (LTV) of a dental patient is \$45,000, it is imperative that all possible barriers of entry into your office are minimized or removed. Every team member must be aware that the number one goal of the initial phone call is to **SCHEDULE AN APPOINTMENT.**

1. Answer within three rings:

There should be one or two primary front office team members who are the most skilled at answering incoming phone calls. However, everyone in the office must be aware of the **three ring rule**. If the primary schedulers are on the phone or assisting another patient, any other team member must answer the phone within three rings and follow the appropriate script. ALL TEAM MEMBERS must be aware of the correct phone call protocol. If one of the primary schedulers becomes available during the call, it is acceptable to transfer the call to them.

2. Build Rapport:

Regardless of what is happening within the dental office, when the phone rings, the answering team member must present themselves in the friendliest and most helpful manner possible. NEVER make the caller feel as if they are an intrusion to your day. As early as possible in the interaction, get the potential patient’s first name and address them by name for the remainder of the call. Being polite and respectful at all times must be an absolute non-negotiable requirement for anyone answering the phone.

3. Categorize (Don’t Qualify) the Caller:

There are six main caller categories and they are listed below in order of priority. Remember that we are not there to qualify whether they are a good fit for our office. Everyone can be a great fit for us, and we are here to make sure they realize how great we are.

The Three E's: Keys to every phone call

1. Energy -

- a. High energy is a mainstay of a positive phone voice. To achieve this- SMILE physically when you answer the phone. The person on the other side will actually be able to hear this in the words you say. High energy is definitely a way of speaking and a tone of voice, so keep up the energy!

2. Empathy -

- a. Many people have a fear of the dentist or will tell you something on the phone that shows some sort of unfortunate feelings. With this information, show EMPATHY in comparing a similar situation you had.
- b. "I've had the same thing happen to me....."
- c. "You know when I had pain..."

3. Edification -

- a. Edify the doctor to make sure the future/new patient knows that the doctor/hygienist they will see is an expert and that this new person will help them achieve whatever they are wanting from our dental office.

***Thank you for calling Capital
Dental this is (Name) how may I
help you?***

Types of Callers:

1. **New Patient-** These callers are the first priority and should be scheduled as soon as possible. (See script below- #s 1,3)
2. **Existing Patient (Scheduling an appointment)-**These callers are also of high priority and should be scheduled as soon as possible. Make sure the patient feels as though they are being welcomed back like an old friend. (See script below- #4)
3. **Existing Patient (Billing/Insurance question) -** These callers are of high priority and must be delivered the highest level of customer service. If at all possible, these callers should be referred to the billing department in order to get the most accurate answers to their questions and to free up the front office team to handle incoming calls. Their name and telephone number should be collected and the call should be returned by the billing specialist within a couple of hours. (See script below- # 7)
4. **Vendors-** These callers should be referred to an office manager or team member in charge of ordering. Get them off the phone as quickly and courteously as possible and have a team member return their call as soon as convenient. (See script below - #8)
5. **Personal Calls-** These calls are of low priority. There should be a policy in place that prohibits personal calls during business hours with the exception of emergencies. (See Script below - #9)
6. **Sales Calls-** These are the lowest priority calls and all should be referred to an office manager or team member. The absolute minimal phone time should be given to these types of calls.(See script below-#10)
7. **Miscellaneous Calls-** These calls are any calls that don't fit directly into any of the above categories. Every attempt should be made to delegate returning these calls to another team member when possible.

***THANK YOU FOR CALLING CAPITAL
DENTAL THIS IS (NAME) HOW MAY I
HELP YOU?***

Greeting:

Thank you for calling Capital Dental this is (Team member's name) how can I help you smile?

The caller will then respond with a question. Here are the most common questions and appropriate responses:

1. **Caller:** Yes, I see here in the paper that you are having a new patient special for \$5 Nitrous. Can you tell me a little more about that?

Team Member Response:

Yes (sir or ma'am) can I get your first name? (Restate their name), our new patient special is \$5 and includes Nitrous laughing gas for the duration of any appointment with (Dr.'s name). May I schedule an appointment for you to experience our office?

2. **Caller:** I have XYZ insurance, do you accept it?

Team Member Response:

Can I get your last name? (Restate their name), we accept most dental insurances. However, there are many subtleties to insurances these days and it is very difficult to determine your level of coverage unless we contact your insurance company directly. We'd be happy to complete a complimentary benefits analysis for you when you are here for your new patient exam. (Patient's name), we have an opening on (offer an appointment day and time.) May I schedule that appointment for you?

(Note: Many consultants advise their clients to do anything to get a caller in the door, even if it means giving misleading information. **DO NOT DO THIS!** It is not the role of the front desk team to qualify and increase the barriers of entry into the practice; however, if a caller asks a direct question such as, "Do you accept XYZ insurance," it is always best to give a straightforward and honest answer.)

3. **Caller:** I'd like to make an appointment, please.

Team Member Response: (LOOK AT FLEX PROGRAM- Is there a NAME?) Great!

What is your name?

Caller: (Name)

Team Member Response: “Oh Hi (name){**Match name with chart shown by Flex Pop-Up**}, what day of the week works best for you to see the doctor/hygienist?”

Proceed down decision path to make appointment.....

Or if FLEX isn't matching...then assume a new patient:

- Search Pt Name- if no result, click Add Patient under “Add New Family” on the bottom right hand corner of the Select Patient pop-up
- **MAKE SURE you are not in the Select Patient pop-up when adding in the new patient info, it will not save anything but the name in that screen**
 - Need to be in the “Edit Patient Information” pop-up (will come up after clicking Add Patient button) for info to save

Caller: I'm a new patient.

Team Member Response: Welcome to the practice! Can I get your name?

Caller: Mary

Team Member: Okay Mary, I just need to gather a little more information from you to get you scheduled.

Critical Information to obtain in initial New Patient phone call:

1. Name (First/Last)
2. Date of Birth
3. Phone Number/Email
4. Insurance Company (if any)
5. Ins Primary Holder/DOB of Primary and Subscriber ID Number.
6. Date of last cleaning/have pt call their previous office to release records and x-rays
7. Doctor Preference

**** Make sure to get the patient's email if they have one, and mention that we will be sending the New Patient paperwork to them via email prior to their appointment if they wanted to save time and fill it out. OTHERWISE- Ask patient to arrive 10-15 mins early for their appointment to fill out health history**

***** Emails are sent at 7:30pm at night, or else go to Flex and send immediately.**

Team Member: Mary, are you interested in scheduling a complete exam, or are you experiencing a specific problem that you would like the doctor to take a look at?

Caller: (Option #1: toothache) I'm having a toothache and I want the doctor to let me know what I have to do to get out of pain.

Team Member Response: I'm so sorry to hear that, Mary. We save a couple of spots each day for emergency patients that are in pain. We have an opening today at (give the available times); would you like to come in today?

Caller: (Option #2: Complete Exam) No, I'm just interested in a check-up and cleaning.

Team Member Response: Great! Lets find a time to get you in to meet our wonderful doctors.

4. **Caller:** Hi, this is Marvin Townson and I need to make an appointment for a crown with (Dr.'s name).

Team Member's Response: Hi Marvin! It's so great to hear from you! Let's get you in right away for that procedure. What's your birthdate and I can pull up your chart? We have an opening on (offer an appointment day and time.) May I schedule that appointment for you?

5. **Caller:** How much do you charge for (X)?

Team Member Response: (Sir or Ma'am), Are you new to our practice or are you an existing patient?

Caller: I'm not currently a patient at your office.

Team Member Response: Ok (sir or ma'am), can I get your name?

Caller: John.

Team Member Response: John, have you recently visited another dentist that told you that you needed (X)?

Caller: Yes, and now I'm calling around to see how much other dentist's charge for (X).

Team Member's Response: John, it is our office's policy to always give a second opinion exam free of charge. This doesn't mean just free exam where we charge for an xray, we mean FREE. Since each dentist diagnoses and treatment plans differently, it is difficult to say whether (Dr.'s name) will have the same treatment recommendations. Would you like to come in for a complimentary second opinion exam? We have an opening on (offer an appointment day and time.) May I schedule that appointment for you?

6. **Caller:** Hi, I had a horrible dental experience about twenty years ago and I haven't been back to a dentist since. I'm really embarrassed about the condition of my mouth but I'm deathly afraid of dentists. Is your dentist gentle?

Team Member's Response: (Sir and Ma'am) I'm so glad you called; can I get your first name?

Caller: Lisa.

Team Member's Response: First of all Lisa, this is a "no judgment office," and we understand that a lot of people have had bad dental experiences in the past...so there is absolutely no reason to be embarrassed. (Dr.'s name) is extremely kind and gentle with (his/her) patients- and we even have the ability to do IV sedation in our office in case you are extremely nervous. If you visit our website at (practice's website address), you'll see dozens of testimonials of happy patients. We have an opening on (offer an appointment day and time.) May I schedule that appointment for you?

7. **Caller:** I have a question about this statement that you sent me.

Team Member's Response: Certainly (sir or Ma'am), can I get your first and last name?

Caller: Jack Butler

Team Member's Response: Thanks Mr. Butler. I am going to pull up your account information right now and forward it over to the billing department. (Team member's name) from the billing department will return your call within two hours. Is there anything else that I can help you with Mr. Butler?

8. **Caller:** Hello, this is Kelly for Titan Dental Supply. Can I speak with (Dr.'s name)?

Team Member's Response: Hi Kelly, (Dr.'s name) is in with a patient right now. (Team member's name) is in charge of ordering. I'll leave a message for her to call you as soon as possible. Thank you!

9. **Caller:** This is Mike, Jennifer's boyfriend, can I talk to her?

Team Member's Response: Jennifer is with a patient right now, if this is an emergency, I can give her a message.

10. **Caller:** Is (Dr.'s name) available?

Team Member's Response: Dr. Costes is with a patient right now, can I take a message?

Caller: Yes, this is John from ABC office supply and I wanted to talk to him/her about his office supply needs.

Team Member's Response: Our office manager (Team member's name) is responsible for all of our office supplies. If you'd like to leave a message, I'll have her call you back as soon as possible. Thank you.

The Confirmation Call Script

This call is important because it is the last interaction that the team will have prior to the first in-person visit to the office. Although this conversation should be quick and to the point, it should set the tone for the upcoming visit. The team member must have an upbeat, friendly and helpful demeanor. Remember, we are "inviting" the prospective patient to join the practice.

LIVE CALL:

Front Desk Team Member: Hello, May I speak with Mr. Williams, please?

Mr. Williams: This is Pete Williams.

Front Desk Team Member: Hello Mr. Williams, this is (Team member's name) from (Dr.'s name office.) I was calling to confirm your appointment (Date, day and time of appointment.) I also wanted to make sure that you received our welcome packet and new patient paperwork.

Mr. Williams: Yes, I'll be at the appointment and I'll bring the paperwork with me.(or "I didn't receive the paperwork")

Front Desk Team Member: Great, Mr. Williams. Our whole team is really looking forward to meeting you in person! Again, my name is (Team member's name) and if you need anything before or during your appointment, please don't hesitate to ask. See you (day and time)!

If they didn't receive the NP Paperwork- double check that they have the correct email, and then go to Flex and re-send the paperwork to their email.

**** (Or Tell Them to come 15 minutes early to fill out paperwork)**

MESSAGE LEFT:

Front Desk Team Member: Hello, this is (Team Member's name) from (Dr.'s name office.) I was calling to confirm Mr. William's appointment at our office on (Date, day, and time.) Please bring the new patient paperwork that was sent to you in the welcome packet. If you have any questions, please don't hesitate to call me at (office telephone number.) Our whole team looks forward to meeting you!

Change Appointment Script:

Front Desk Team Member: Hello, May I speak with Mr. Williams, please?

Mr. Williams: This is Pete Williams.

Front Desk Team Member: Hello Mr. Williams, this is (Team member's name) from (Dr.'s name office.) I was calling because Dr. Killeen has had a change in his schedule and I was calling to see if you could help him out by coming in tomorrow at 4:00pm rather than....(time). If that would work, it would help us out soo much!