FrontOfficeAcademy
By Dental Success Network

Phone Call Scripts

A workbook of fill-in scripts, practice drills, and a coaching plan for the calls your team takes every day.

Practice name	
Team member	
Date started	

15
fill-in scripts

8
role-play drill cards

4
weekly team huddles

How to use this workbook

Most new patients talk to your front desk before they ever meet the doctor, and if that call goes poorly, you may never know you lost them, since they'll simply call the next office on their list.

This workbook gives your team fill-in scripts, practice drills, and a four-week coaching plan so every call is handled the way your office wants it handled.

If you answer the phones

1. Fill in the Practice Info Sheet (Part 2) with your team leader.
2. Read Part 1 and write your own greeting.
3. Work through the scripts in Part 3. Read each one aloud, then rewrite it in your own words.
4. Practice with a partner using the drill cards in Part 4.
5. Track your calls with the self-check and call log.

If you lead the team

1. Complete the Practice Info Sheet with your doctors, so every answer matches how your office works.
2. Set your ring standard and callback times on the Info Sheet.
3. Give the Backup Answerer card to everyone who might pick up the phone.
4. Run the four-week huddle plan in Part 5 and use the listening scorecard to coach.
5. Have everyone sign the team phone promise.

What's inside

- **Part 1, The Basics:** the goal of the first call, three habits for every call, your caller types, the Three E's, and a Backup Answerer card.
- **Part 2, Your Practice Info Sheet:** the details every script pulls from.
- **Part 3, The Scripts:** fifteen fill-in scripts covering new patients, insurance, pricing, billing, emergencies, other offices, vendors, confirmations, cancellations, voicemail, and no-shows.
- **Part 4, Practice and Self-Check:** eight role-play drill cards, a call self-check, and a call log.
- **Part 5, Team Leader's Guide:** a four-week huddle plan, coaching tips, a listening scorecard, and a team phone promise.

How the fill-in fields work

Type directly into the shaded boxes on screen, or print the pages you need and write by hand.

Inside the scripts, anything in [brackets] is a detail to swap for your own, usually pulled from your Practice Info Sheet.

Part 1: The Basics

The goal of the first call

The goal of a new patient call is to get the caller scheduled.

Your job is to work out what kind of call it is, not to decide whether the caller is a good fit for your office.

Every hurdle you put between a new patient and their first visit (a fee mentioned too early, a long list of policies, a vague answer) gives them a reason to call the next office instead.

Three habits for every call

1. **Answer quickly.** We recommend answering within three rings. Set your office's standard on the Info Sheet, and make sure everyone who might pick up the phone knows it.
2. **Listen first.** Most callers tell you what they need in their first sentence, whether it's a toothache, an insurance question, or a move to a new town. Respond to that before you ask for anything else, then get their first name and use it for the rest of the call.
3. **Sort and route.** Work out what kind of call it is, using the caller types below, so you can respond well and send it to the right person.

Agree on an "on a call" signal

When the front desk is on the phone, teammates should know to take their question to the next person.

A simple signal, like the phone held to your ear or a raised hand, keeps you focused on the caller instead of splitting your attention.

Know your callers

Most calls fall into one of these types. When more than one call or message is waiting, handle them in this order.

A true emergency always comes first, no matter who's calling, and the order never changes how well anyone is treated.

Order	Caller	What to do	Script
1	Anyone in pain or with an emergency, new or existing	Comfort first, then follow your doctor's triage plan.	13
2	New patient	Schedule as soon as possible.	1, 2, 3, 5, 6
3	Existing patient scheduling or rescheduling	Welcome them back and get them on the schedule.	4, 12
4	Billing or insurance question	Answer if you can. If not, route to the right person and set a callback time.	7
5	Another office (referring dentist, specialist, lab, insurance company, pharmacy)	Be as warm as you are with patients, and route to the right person.	10
6	Vendor or sales rep	Keep it short and courteous, and take a message.	8
7	Personal call for a team member	Ask if it's an emergency. If it is, it moves to the top. If not, take a message.	9

Honest answers come first

When a caller asks a direct question, such as whether you take their insurance, give a straight answer, then invite them in.

If you don't know the answer, don't guess. Tell the caller who on your team does know, and have that person call them back.

Your greeting

Keep it short and warm: "Thank you for calling [practice name], this is [your name], how can I help you today?" Some offices like a more playful close, such as "how can I help you smile?", so pick the one that sounds like your team. Write your version below, then say it out loud three times.

The Three E's

Great phone calls have three things in common. Read what each one looks like, then write a line you could really say.

The gray sample is there to get you started, so borrow it, change it, or replace it.

	What it looks like	Write your own
Empathy	Many callers are nervous, in pain, or frustrated before you say a word. Match their mood, repeat back what they told you, and let them know you heard it.	**What could you say to a caller who's in pain?** Sample: I'm so sorry you're hurting. Let's get you taken care of today.
Energy	Sit up, smile, and talk as if the caller is standing in front of you, since callers can hear the difference. A busy desk or a long day can drain your voice, so reset before you pick up.	**What will you do before you answer?** Sample: Sit up, smile, and take one slow breath before I say hello.
Edification (bragging on your team)	When you hand a caller to someone else, tell them why that person is the right one to help, whether it's the doctor, a hygienist, an assistant, or whoever handles billing. New to the team? Ask your coworkers for one or two true things about each person.	**How will you describe someone on your team?** Sample: [Team member] handles all of our insurance questions and will get to the bottom of your benefits.

Backup Answerer card

For anyone who picks up when the front desk is busy, usually an assistant or the office manager.

You don't need schedule or insurance training to handle a call well.

Just take a clear message and make sure it gets to the right person.

You say	**You:** "Thank you for calling [practice name], this is [your name]. Our front desk is helping another patient right now. May I get your name, your number, and a quick note about what you need? Someone will call you back by [time]."
If you don't know	**You:** "I want to make sure you get the right answer, so I'll have [team member] call you back. They handle that for us every day."
If they're in pain	Don't take a message for an emergency. Get the front desk or whoever is in charge today right away, even if they're with someone, and stay on the line until they take over. If the caller has trouble breathing or swallowing, or swelling that's spreading toward the eye or neck, tell them to call 911 or go to the nearest emergency room.
Every message gets	☐ Caller's first and last name ☐ Best phone number ☐ New or existing patient ☐ What they need, in a few words ☐ Your name and the time of the call
Our callback promise	
Messages go to	

Part 2: Your Practice Info Sheet

Fill this out once with your doctors, and every script in Part 3 can pull its answers from here.

That way, whoever answers the phone gives callers the same answer.

About our office

Practice name	
Main phone number	
Website	
Address and parking	
Office hours	
Doctors and hygienists	
Office manager	
Do we see children? From what age?	

Phones and messages

We answer within this many rings (we recommend three)	
Who answers the phone first	
Backup answerers when the front desk is busy	
Who checks voicemail, and when	
We return voicemails by	
After-hours emergency instructions	

Insurance, fees, and offers

In-network plans (or where the current list is kept)	
Out-of-network plans we file claims for (or where the list is kept)	
Medicaid (yes or no, and any options we offer instead)	
New patient exam fee	
Current new patient offer, if any	
Membership or cash-pay plan pricing	
Financing options (for example, CareCredit)	
Second opinion or consultation policy	

Who handles what (write a person's name)

Billing questions, and our callback window	
Insurance questions	
Vendor calls (companies we already buy from)	
Sales calls (companies selling something new)	
Calls from other offices, labs, and pharmacies	

Scheduling

Emergency slots held each day	
Do we keep an ASAP list? Who manages it?	
Cancellation policy and notice needed	
How new patient paperwork is sent	
Comfort or sedation options we offer, and one true thing about how our doctor helps nervous patients (for Script 6)	
Length of common appointments (new patient, crown, cleaning)	

Price ranges we quote by phone

Only list the procedures your doctor is comfortable quoting. Leave the rest blank, and use Script 5 to invite those callers in for an exam.

Procedure	Range before insurance

Part 3: The Scripts

Each script gives you the caller's words, a response to start from, room to write your own version, and checkboxes to track your progress.

Anything in [brackets] is a detail to swap in, usually from your Practice Info Sheet.

> **Why rewrite them?**
>
> Callers can tell when someone is reading, so keep the structure of each script and change the words until they sound like you.
>
> Use the script as a checklist to make sure you cover everything, not as lines to memorize.

Script 1: The new patient special

The caller	"I saw your new patient special. Can you tell me more about it?"
What they need	A clear answer and an easy next step.
You say	**You:** "Of course! May I get your first name?" (Repeat their name.) **You:** "[Name], our new patient special is [describe your offer, for example, a $99 exam, cleaning, and x-rays]. At your first visit, [what really happens at your new patient visit]. We have an opening on [day and time]. May I get you scheduled?"
Watch for	Only mention offers your practice really runs, and describe them exactly as advertised. Don't promise a cleaning at the first visit unless that's your protocol. With no current special, this script still works for any "what happens at a new patient visit?" question.
In your own words	
Practice	☐ Read aloud ☐ Practiced with a partner ☐ Rewrote in my words

Script 2: The insurance question

The caller	"I have [plan name]. Do you take it?"
What they need	A straight answer about their plan, including whether you're in-network.
You say	**You:** "Great question. May I get your first name?" Then use the line that matches your Info Sheet. **If in-network:** "Yes, we do, [name]. We're in-network with [plan], so you'll get your plan's in-network rates here." **If out-of-network:** "Yes, we do accept [plan], [name]. We're out-of-network with them, which means your plan still pays part of the cost, but your share may be higher than at an in-network office. We'll file the claim for you and check your benefits before your visit, so you'll know your cost ahead of time." **If you're not sure:** "Let me check so I give you the right answer. Can I get your plan name and member ID and call you back by [time]?" **Then:** "[Team member] handles our insurance questions and can go over your benefits with you. We have an opening on [day and time]. Would that work?"
Small office?	If you're the one who handles insurance, skip the handoff. Offer to check their benefits now, or call them back by [time] with the answer.
Medicaid	**If you don't accept it:** "We don't accept Medicaid, but [our membership plan or financing] may help. Would you like me to walk you through those options?"
Watch for	Only say "yes, we accept it" if your office files claims for that plan. When a caller names a specific plan, don't answer with "we take most insurances."
In your own words	
Practice	☐ Read aloud ☐ Practiced with a partner ☐ Rewrote in my words

Script 3: “I’d like to make an appointment”

The caller	“I’d like to make an appointment, please.”
Step 1: Look them up	**You:** “Of course! May I have your first and last name?” (Search your system.) **If you find them:** “Hi [name], it’s great to hear from you! What day of the week works best for you?” Then move on to scheduling. **If there’s no match,** treat the caller as a new patient and continue below.
Step 2: Find the need	**You:** “Welcome to [practice name], [name]! Are you looking for a complete exam, or is there something specific you’d like the doctor to look at?” **If they’re in pain:** “I’m so sorry, [name]. We hold [number] spots each day for patients in pain, and we have one today at [time]. Can you come in?” Book the time first, then collect the details in Step 3. **If it’s a check-up:** “Great, let’s find a time for you to meet [doctor name].” **If you’re booked out:** “Our next new patient opening is [date]. Schedules do change, so may I also put you on our ASAP list and call you if something opens sooner?”
Step 3: Collect the essentials	You: “I just need a few details to get you on the schedule.” ☐ Date of birth ☐ Phone number and email ☐ Insurance company, if any ☐ Primary insurance holder, their date of birth, and subscriber ID ☐ Name of their last dental office (we’ll request records and x-rays once they sign the release in their paperwork) ☐ Doctor preference ☐ How they heard about us
Step 4: Paperwork	Let them know you’ll email new patient paperwork, including a records release, ahead of time. With no email, ask them to arrive 15 minutes early to fill it out.

Script 3, continued: Make it your own

Watch for	Review the schedule in your morning huddle, so you know your openings before the phone rings.
In your own words	
Practice	☐ Read aloud ☐ Practiced with a partner ☐ Rewrote in my words

Script 4: An existing patient needs a procedure

The caller	"Hi, this is [patient name], and I need to schedule my [crown] with [doctor name]."
What they need	A warm welcome back and a visit booked correctly the first time.
You say	**You:** "Hi [name], it's great to hear from you! What's your date of birth so I can pull up your chart?" **You:** "I see the [crown] [doctor name] recommended. That visit takes about [length], so let me find a time that fits." (Check the treatment plan, appointment length, and whether insurance needs a pre-authorization.) **You:** "We have an opening on [day and time]. Does that work for you?"
Build rapport	If the chart has a personal note from their last visit (a trip, a new baby, a new job), ask about it. After the call, add a quick note of your own so the next person can do the same.
In your own words	
Practice	☐ Read aloud ☐ Practiced with a partner ☐ Rewrote in my words

Script 5: The price shopper

The caller	"How much do you charge for [procedure]?"
What they need	A real number to work with, and a reason to trust your office. Many price shoppers are comparing offices after another dentist gave them a diagnosis.
You say	**You:** "Happy to help. Are you new to our practice, or an existing patient?" **Caller:** "I'm not a patient there." **You:** "May I get your first name?" **Caller:** "John." **You:** "John, did another dentist recommend [procedure]?" **Caller:** "Yes, and I'm calling around to compare." **If it's on your price list:** "That makes sense. For [procedure], most patients here pay between [$low] and [$high] before insurance. The exact cost depends on what [doctor name] finds, since every dentist plans treatment a little differently. [We offer a second opinion exam at no charge, x-rays included.] We have an opening on [day and time]. May I get you scheduled?" **If it's not on your price list:** "That one really depends on what [doctor name] sees, so I don't want to give you a number that's off. The best next step is [a new patient exam or consultation], which is [fee]. We have an opening on [day and time]. May I get you scheduled?"
Be honest about offers	Set price ranges with your doctor and record them on the Info Sheet. If you don't offer a free second opinion, offer a consultation or new patient exam and share the fee before the caller books. Never call an offer free unless it is.
In your own words	
Practice	☐ Read aloud ☐ Practiced with a partner ☐ Rewrote in my words

Script 6: The nervous or embarrassed caller

The caller	"It's been a really long time since I've seen a dentist. I had a bad experience years ago."
What they need	To feel safe, not judged. This is where Empathy, Energy, and Edification matter most.
You say	**You:** "I'm so glad you called. May I get your first name?" **Caller:** "Lisa. Honestly, I'm kind of embarrassed about my teeth." **You:** "Lisa, you have nothing to be embarrassed about. Lots of people put off the dentist after a bad experience, and [doctor name] [one true thing about how your doctor works with nervous patients, from your Info Sheet]. [We also offer sedation options if that would help.] We have an opening on [day and time]. Would you like to come in?"
Watch for	Slow down, lower your voice a little, and let the caller finish. Only mention comfort options your practice really offers. Add a note to the chart so the whole team knows before the visit.
In your own words	
Practice	☐ Read aloud ☐ Practiced with a partner ☐ Rewrote in my words

Script 7: The billing statement question

The caller	"I have a question about the statement you sent me."
What they need	A clear answer from someone who knows, or a callback they can count on.
You say	**You:** "Of course. May I have your first and last name?" **Caller:** "Jack Butler." **You:** "Thank you, Jack. I'm pulling up your account now." **If you can answer:** walk through the statement with them. **If you can't:** "[Billing team member] handles our billing and can go through your statement with you. They'll call you back by [time] today. Is this the best number to reach you?" **You:** "Is there anything else I can help you with?"
Watch for	If you handle billing yourself, answer on the spot when you can. If you promise a callback, set a window your team can actually keep (it's on your Info Sheet), and make sure the call happens.
In your own words	
Practice	☐ Read aloud ☐ Practiced with a partner ☐ Rewrote in my words

Script 8: The vendor or sales rep

Know the difference	A **vendor** is a company your office already buys from. A **sales rep** is calling to sell something new. Your Info Sheet lists who handles each.
The caller	"Hi, this is [name] with [company]. Is [doctor name] available?"
You say	**Vendor:** "[Doctor name] isn't available right now, [name]. [Team member] handles our orders, so I'll have them call you back. What's the best number for you?" **Sales rep:** "[Doctor name] isn't available right now. [Team member] reviews new products for us, so I'm happy to pass along your name and number." **If they insist:** "I understand. I'll make sure [team member] gets your message today."
Small office?	If you handle orders yourself, take the call when you have a minute, or give the caller a callback time that works for you.
Watch for	Be warm and brief, take the message, and get back to the patients who are waiting.
In your own words	
Practice	☐ Read aloud ☐ Practiced with a partner ☐ Rewrote in my words

Script 9: The personal call

The caller	"This is [name], [team member]'s [relationship]. Can I talk to them?"
You say	**You:** "[Team member] isn't available right now. Is this an emergency?" **If yes:** "I'll get them for you right away." **If no:** "I'm happy to take a message, and I'll make sure they get it."
Watch for	Have a clear team policy that personal calls are for emergencies during business hours, and share it with families ahead of time. A real emergency always goes straight through.
In your own words	
Practice	☐ Read aloud ☐ Practiced with a partner ☐ Rewrote in my words

Script 10: Calls from other offices

The caller	"Hi, this is [name] from [a dental office, lab, insurance company, or pharmacy]."
What they need	A quick, friendly handoff to the right person. Referring offices send you patients, so treat them with the same warmth you give a new patient.
You say	**You:** "Thanks for calling, [name]. How can I help?" **Referral from another office:** "We'd be glad to see your patient. Can you send the referral and x-rays to [email or fax]? I'll call the patient to schedule by [time]." **Lab:** "[Team member] handles our lab cases. Let me get them for you, or I can take a message." **Insurance company:** "[Team member] handles our insurance calls. May I get your name, reference number, and callback number?" **Pharmacy:** "I'll get this to [doctor name]. May I have the patient's name, date of birth, and your callback number?"
Watch for	Follow HIPAA and your office's privacy policy before sharing any patient details, and confirm who you're speaking with first.
In your own words	
Practice	☐ Read aloud ☐ Practiced with a partner ☐ Rewrote in my words

Script 11: The confirmation call

When to use it	Many offices confirm by automated text. Use this live call for new patients, or for anyone who hasn't confirmed by text. It's the last conversation before a first visit, so keep it quick and upbeat.
Live call	**You:** "Hi, may I speak with [first and last name]?" **Patient:** "This is [name]." **You:** "Hi [name], this is [your name] from [practice name]. I'm calling to confirm your visit on [day, date, and time] with [doctor name]. Did you get the new patient paperwork we emailed?" **If yes:** "Great, we'll see you on [day]. If you need anything before then, just call me at [office phone number]." **If no:** Double-check their email and resend it, or ask them to arrive 15 minutes early to fill it out.
Message left	**You:** "Hi, this is [your name] from [practice name], calling for [first name] about an upcoming appointment. Please call us at [office phone number]. We look forward to seeing you!"
Watch for	Follow HIPAA and your office's privacy policy for how much detail to leave on a voicemail.
In your own words	
Practice	☐ Read aloud ☐ Practiced with a partner ☐ Rewrote in my words

Script 12: Cancel or reschedule

The caller	"I need to cancel (or move) my appointment."
What they need	A kind response with no lecture, and an easy way to keep their care on track.
You say	**You:** "Thanks for letting us know, [name]. Let's find a time that works better. Is there a day of the week that's usually best for you?" **If your policy applies:** "[Share your cancellation policy in one friendly sentence.]" **You:** "Can I get you rescheduled before we hang up, so your care doesn't get pushed back? We have an opening on [day and time]." **If they decline:** "No problem at all. We'll be here whenever you're ready. Is there anything we can do to make your next visit easier?"
Watch for	Try to rebook on the same call, and offer to call them if an earlier time opens. A gentle question about whether anything worried them can bring up cost or fear concerns you can help with.
In your own words	
Practice	☐ Read aloud ☐ Practiced with a partner ☐ Rewrote in my words

Script 13: Pain or emergency

The caller	“I have a really bad toothache.” (Or a broken tooth, or swelling.)
What they need	Comfort first, then a fast plan.
You say	**You:** “I’m so sorry you’re hurting, [name]. Let’s get you taken care of. May I ask a few quick questions so the doctor knows what to expect?”
Your doctor’s triage questions	Have your doctor edit these samples, then write the final list below. Only ask the questions listed here, and don’t try to diagnose. Sample: Where is the pain, and how long have you had it? Is there any swelling, and if so, where? Do you have a fever? Is it a constant ache, or does it come and go?
Next step	**If you have an opening:** “We have an opening today at [time]. Can you come in then?” **If you’re full today:** follow your doctor’s plan, for example, “We’re full today, but I’m holding [time] tomorrow morning for you. If it gets worse before then, please call us right away.”
Red flags	Some symptoms need emergency medical care, not a dental visit. Common examples include trouble breathing or swallowing, swelling that spreads toward the eye or neck, or bleeding that won’t stop. For these, tell the caller to call 911 or go to the nearest emergency room right away. Ask your doctor to confirm the list and add any others here:
In your own words	
Practice	☐ Read aloud ☐ Practiced with a partner ☐ Rewrote in my words

Script 14: After-hours voicemail and returned calls

Voicemail greeting	**You:** “Thank you for calling [practice name]. Our office is currently closed. Our hours are [office hours]. If this is a dental emergency, please [your after-hours emergency instructions]. Otherwise, leave your name, phone number, and the best time to reach you, and we’ll call you back by [time] on the next business day.”
Returning a call	**You:** “Hi [name], this is [your name] from [practice name], returning your call from [yesterday or this morning]. How can I help?”
Watch for	Return every message by the time you promised, and log each one so nothing slips. Both details are on your Info Sheet.
In your own words	
Practice	☐ Read aloud ☐ Practiced with a partner ☐ Rewrote in my words

Script 15: The no-show follow-up

Live call	**You:** “Hi [name], this is [your name] from [practice name]. We missed you at your appointment today at [time] and wanted to make sure everything is okay. Do you have a minute to find a new time?”
Message left	**You:** “Hi [name], this is [your name] from [practice name]. We missed you today and wanted to check in. Please call us at [office phone number] so we can find a time that works for you.”
Watch for	Call the same day and keep the tone warm. The goal is to bring the patient back, so leave out guilt and fees on this first call.
In your own words	
Practice	☐ Read aloud ☐ Practiced with a partner ☐ Rewrote in my words

Part 4: Practice and Self-Check

Role-play drill cards

Work in pairs. One person plays the caller using a card, and the other answers with the matching script.

Switch roles after each round, and add the twist once the basic call feels easy.

Card	The caller	Make it harder	Script	Done
A	A price shopper in a hurry	The caller keeps interrupting and wants a number right now.	5	☐
B	A nervous caller who hasn't been in for years	The caller is embarrassed and says they might cancel if they have to explain.	6	☐
C	An insurance question about a plan you don't know	The caller insists you just say yes or no.	2	☐
D	A toothache at 4:45 in the afternoon	There are no openings today.	13	☐
E	A same-day cancellation	The caller is also upset about a bill they received.	12	☐
F	A billing statement question	The caller is frustrated and asks to speak with the doctor.	7	☐
G	A new patient with no email	The caller doesn't want to share their date of birth over the phone.	3	☐
H	A vendor who won't take a message	The caller insists on speaking with the doctor.	8	☐

Call self-check

After a batch of calls, rate yourself honestly. The goal is to notice patterns, not to grade yourself.

On my calls, I...	Rarely	Sometimes	Often
I answered within our ring standard.	☐	☐	☐
I smiled and gave a warm greeting.	☐	☐	☐
I listened to what the caller needed before asking questions.	☐	☐	☐
I got the caller's first name early and used it.	☐	☐	☐
I showed empathy when the caller shared a concern.	☐	☐	☐
I bragged on the person I handed the caller to.	☐	☐	☐
I gave a straight answer, or found someone who could.	☐	☐	☐
I offered a specific day and time and asked the caller to schedule.	☐	☐	☐
I collected all the new patient information.	☐	☐	☐
I ended the call warmly.	☐	☐	☐

Reflect

Which script felt most natural, and why?

Which script did you rewrite the most, and what did you change?

One thing I will do differently on tomorrow's first call:

Call log

Jot down a few calls each day for a week. Tracking where new patients heard about you also helps your office see which marketing is working.

Date	Caller type	How they heard of us	Script	Booked?	What went well, and what to try next time

Part 5: Team Leader's Guide

This section is for the office manager or trainer. It turns the workbook into a four-week plan built on short weekly huddles, so the team improves a little at a time without taking over the schedule.

By the end, every script and every drill card has been practiced once.

The four-week huddle plan

Week	Focus	The 30-minute huddle	Homework
1	The basics and the Three E's	5 min: read the goal of the first call together. 10 min: everyone says their greeting aloud. 10 min: each person shares an example of Empathy, Energy, and Edification. 5 min: confirm your ring standard and your "on a call" signal.	Fill in the Practice Info Sheet. Write your own greeting. Give the Backup Answerer card to everyone who might pick up the phone.
2	New patients and insurance (Scripts 1 to 4)	10 min: role-play cards C and G. 10 min: role-play Scripts 1 and 4, and score both calls with the listening scorecard. 10 min: share one thing that worked.	Complete the self-check after five calls.
3	Fear, price, billing, and routing (Scripts 5 to 10)	10 min: role-play cards A, B, and F. 10 min: role-play card H, then quick rounds of Scripts 9 and 10. 10 min: agree on what the team will and won't promise on a first call, including prices and insurance.	Rewrite Scripts 5 to 7 in your own words.
4	Confirmations, cancellations, and emergencies (Scripts 11 to 15)	10 min: role-play cards D and E. 10 min: quick rounds of Scripts 11, 14, and 15. 10 min: review the call logs, name one win per person, and choose one goal for next month.	Score two real calls with the listening scorecard, by listening in or using recordings.

Keep it going after week 4

Run a short phone skills check once a month using the listening scorecard, and include anyone who answers as backup, not just the front desk.

Spend 5 to 10 minutes as a group on wins and challenges.

How to coach a call

- **Start with what went well,** and be specific.
- **Coach one thing per call,** since a long list of notes means none of them stick.
- **Role-play the fix right away,** while it's still fresh.
- **Frame it as growth,** not as checking up on anyone. If a call didn't book, it's a chance to learn and to call that patient back.
- **If you record or listen in on calls,** follow your state's call recording consent rules and let your team know how recordings are used. No recordings? Listen in live, or score role-plays instead.

Call listening scorecard

Score each behavior 0 (missed it), 1 (partly), or 2 (nailed it). Print or save a copy for each call.

Behavior	0	1	2	Notes
Answered within the ring standard	☐	☐	☐	
Warm, energetic greeting	☐	☐	☐	
Listened for the reason they called	☐	☐	☐	
Used the caller's name	☐	☐	☐	
Showed empathy	☐	☐	☐	
Edified the doctor or team member	☐	☐	☐	
Gave honest, clear answers	☐	☐	☐	
Offered a specific day and time	☐	☐	☐	
Asked the caller to schedule	☐	☐	☐	
Collected the needed information	☐	☐	☐	
Ended with a warm close	☐	☐	☐	

Keep doing

Try next

Our team phone promise

Read this together, adjust it so it fits your office, and have everyone sign.

As a team, we promise to:

- Answer every call within our ring standard, with a warm greeting.
- Listen first, and use every caller's name.
- Give honest answers, even when a simple yes would be easier.
- Invite every caller to schedule, and make it easy to say yes.
- Return every message by the time we promised.

Name	Signature	Date

Want more practice for every seat on your team?

This workbook covers the front desk. A Front Office Academy membership extends that training to your whole dental team, front office and clinical, with role-specific lessons on phones, scheduling, insurance, case acceptance, and practice management.

What's included

- **Video training for each role,** so a new receptionist, treatment coordinator, billing specialist, office manager, dental assistant, or hygienist has a clear place to begin.
- **Monthly live phone skills training** that uses real calls, so your team hears what works and what to change. Calls are reviewed with patient names and details removed.
- **Downloadable scripts, checklists, and systems** your team can adapt for your office.
- **One membership for up to 25 team members.**

Try it free for 7 days

Explore the full training library with a free 7-day trial. Everything in this workbook is yours to keep either way.

Start your free 7-day trial at frontofficeacademy.com

After the trial, membership is $179 a month, or $49 a month for Dental Success Network members. Dental Success Network (DSN) is a membership community for dental practice owners, with coaching, continuing education, and supply discounts. Front Office Academy is built by DSN, so DSN members get the lower rate. Learn more at dentalsuccessnetwork.com.