

Phone answering Dos and Don'ts

💡 **Start every call seeking to understand what the patient actually needs.** Once you understand them, use that knowledge and opportunity to "talk up" the practice, the doctors, the team, etc. Make them feel heard and comfortable with the office.

💡 If a patient mentions being in pain or in a difficult condition, **show empathy on the phone. This is HUGE.** Saying something like "I'm so sorry to hear that, but I'm glad you found us. We are going to take care of you and do everything we can to get you fixed up" can go a long way in making them feel heard.

💡 **Avoid giving only a yes/no answer.** Instead, show value and move the conversation forward towards booking them an appointment. That is the primary goal of every new patient phone call that comes into the practice.

Examples:

Patient: "Do you accept [insurance plan]?"

Instead of:

No... I'm sorry.

Say:

We accept all insurances! And while we are not in-network with [plan], we have a ton of patients with [plan]. Dr. Smith is one of the best dentists around, so people choose to come to us regardless of their insurance plan. We are usually booked up, but I have a couple of slots available next week. Do you want to schedule an appointment to come and meet him?

Patient: "Do you do IV Sedation?"

Instead of:

No... I'm sorry.

Say:

What type of treatment are you interested in? Are you looking for IV sedation because of dental fear/anxiety?

[Listen... if what they are asking for is something we do...]

Dr. Smith performs [procedure] here very often. They are really good at it. We have a lot of patients who come here looking for IV sedation due to fear. Usually, after meeting the doctors and talking through options, most patients feel extremely comfortable with the oral sedation options we offer. Would you like to schedule an appointment?

💡 **Once a patient mentions that they want to schedule an appointment, make them feel welcome and excited to come to the practice.** We know that the office is busy and it is

important to "get down to business" with details on insurance, dob, etc but that personal touch improves retention.

Patient: "I would like to schedule a new patient appointment."

Instead of:

Ok, can I get your Dob, address, insurance information, call back number, etc.

Say:

That's fantastic! Let me be the first to welcome you to our office! You are going to love it here.

[then collect their information & schedule the appointment]

Alright, you are all set. Looking forward to meeting you in person here at our office!

💡 After welcoming a patient into the practice, **use the "dual alternative approach"**:

Instead of:

When do you want to come in? [This is too open ended]

Say:

I have a couple of appointments available coming up. I have Tuesday at 9 am or Thursday at 3 pm. Which would you prefer?

Would you prefer...

This week or next week?

Morning or afternoon?

8:00 or 10:00

If there is only one appt time available in the window they've requested, you still give two options. "Would you prefer 8:00 or would it be better to look at another day?"

💡 **Schedule the patient while they are on the phone.** There is no better time than now.

Don't:

Collect their insurance information and call them back. If they are busy when you call them back, you may end up playing phone tag and losing the patient.

Do:

Find a time and book their appointment while you have them on the phone. That creates commitment on their side. If you need to verify insurance and call them back, do so only after you've put them on the schedule and they know they have an appointment.


💡 **Scarcity creates value & desire.** When a restaurant has a huge line out of the door, what do we assume? The place must be really good! Our focus needs to be on getting them in at the next available time, they don't need to know the doctor's schedule, what days we are closed, etc. We want them to assume feel like our practice is really busy, not that we don't work enough days. This also helps improve appointment retention - when they know appointments are hard to come by, they cancel less.

Instead of:

Dr. Smith only works on Mondays and Tuesdays.

Say:

Our office is super busy, the next available appointment is next Tuesday at 2 pm. If that doesn't work, the following availability will be on the following Monday at 9 am. Dr. Smith is in really high demand so appointments are tight. Which do you prefer?

 **Stick to the address.** Avoid mentioning that the office is located in a tom thumb shopping center or next to a subway. Don't mention it is in a strip mall instead of a dental building. It makes the office sound like a run-down or low-quality place. If they call the office asking for directions, then give some reference points.

The most effective way to implement this is to:

1. Review this together as a team. Anyone that may answer a patient call needs to be on the same page and have the same expectations around phone answering.

2. Make this part of the daily huddle. Remind everyone to be excited on the phone today. Show compassion. Turn those "I'll call you backs" into "Yes, I think I want to schedule an appointment"!

3. Make this part of the office culture. The phone is THE KEY to a successful practice. That is where dentistry happens. That is where the patients get their first impression of the office. It sets the tone for their entire experience with us. We have to get it right. This is not the kind of thing an office can talk about once and expect change. It has to be talked about constantly.

Phone Answering Training Videos

Below are a few links to videos that give tips on how to handle price shoppers, converting patients, asking for referrals, and the "do you take my insurance" questions.

- [Introduction](#)
- [Price Shoppers](#)
- [Do You Take My Insurance](#)
- [Converting Patients](#)
- [Referrals](#)

We hope these help when it comes to answering those tricky questions, and please let us know if you have any questions.