

Telephone Team Checklist

— Answer the phone before the 3rd ring

- With a friendly voice
- With a smile on your face
- With a warm greeting
- With a “thank you” for calling
- Identifying yourself and offering help

— Listen to the caller

- Be empathetic
- Show that you are interested and care

— Answer questions quickly and confidently

- Include your personal experience or another patient’s good experience when possible
- Reinforce you physician’s credentials or your business’ accolades

— Get contact information and referral source

- Build trust and bonding by having a short conversation first to get to know a little about the prospect
- Asking for information and referral source immediately after the greeting can seem pushy

— Ask for the appointment

- Offer a couple of appointments times
- Be prepared to manage common objections

— End the call with a summation of your conversation