

# Turn Your Calls into a Revenue Generator

## Call Conversion Checklist for Scheduling Success

### Greeting & First Impression

- Announce name
- State business name
- Collect caller's name & number
- Offer assistance
- Project warmth and friendliness

### Uncover & Build Relationship

- Use caller's first name frequently
- Keep focus on the clinical reason for the call
- Ask about discomfort / sensitivity
- Actively listen to the caller
- Ask about insurance coverage
- If out of network, offer to perform a complimentary benefits check to see how their plan will work in your practice
- Offer choice of appointment times

### Convert & Reassure

- Redirect questions about cost to focus on ways to make it affordable
- Reassure caller that you help people just like them all the time
- If second opinion, affirm it's a good idea
- If scheduling is an issue, uncover reason so you can offer solutions
- Ask referring source
- Confirm appointment details
- If unscheduled, remind the patient that you would like to take care of the problem that led to their call and ask if there is anything keeping the patient from moving forward

**Your phone is the lifeline to your practice.** Callers have more questions than ever about safety protocols, treatment costs, insurance coverage, and scheduling. Patient Prism tells you what to say to overcome their concerns and schedule them for the dental care they called you about.