



## CALL EVALUATION FORM

CALL DATE \_\_\_\_\_ CALLER NAME \_\_\_\_\_ TEAM MEMBER \_\_\_\_\_

### THE WELCOME

- Clearly states name and doctor/practice name using upbeat tone
- Gains control (pin in question)
- Asks for the caller's name
- Thanks or welcomes the caller
- Asks for the referral source

### RELATIONSHIP BUILDING

- Asks open-ended questions - "Tell me..."
- Acts friendly, attentive, appreciative, and engaged in the call (Tone)
- Hold time of less than a minute (if applicable)
- Uses caller's name in the conversation
- Builds rapport by expressing interest in, or empathy for the patient
- Builds value and credibility for the doctor/practice

### PROBLEM SOLVING

- Explains insurance/fees/procedures using layman's terms (not "educating")
- Uses positive language
- Overcomes patient objections to fee, insurance or other pain points

### THE CLOSE

- Asks for the appointment
- Asks to schedule any other family members
- Sets expectations for the first appointment
- Creates commitment
- Asks if caller has any additional questions

### NO DECISION/FOLLOW UP

- Asks for phone number or email and permission to follow up

### CALL NOTES