



- What happened?
- What's next?
- Transition goodwill/rapport

- Understand patient motivation & concerns
- Express empathy or excitement
- Demonstrate that you understand

- Positive assumption
- Help patient understand needs & process
- Discuss costs and options

- Overcome any objections
- Help patients get started
- What CAN we do?

- Schedule appointments
- Create commitment
- Clarify financial expectations

“The total for (tx needed) is \$____. It looks like your insurance should help us out with about \$____. We’re going to ask you to take care of this estimated portion of \$____ when you come in, and then we’ll bill you for whatever is leftover after insurance pays. How does that sound?”