



Converting New Patients Leads into Patients of Record

In the article “[Assessing Dental Practice Growth Potential Before Buying](#)” we discussed how converting new patient leads into loyal patients of record is a key driver of long-term growth. A major part of that process depends on how your front office team handles the very first interaction, the initial phone call.

To illustrate what an effective new patient call sounds like, this document includes an example of a new patient call script.

ME: Good afternoon is this Sally Smith?

SALLY: Yes, it is.

ME: Awesome! My name is Adam and I’m calling on behalf of Dr. Goldsmith’s dental office. How are you today?

SALLY: I’m doing well, thank you how are you?

ME: Couldn’t be better! I received an appointment request from our website and Dr. Goldsmith would love the opportunity to meet you! Are you looking for an appointment for a regular hygiene visit or do you have a more urgent matter you need to discuss with the doctor?

SALLY: I’m just looking for a regular family dentist.

ME: Perfect! You’ve definitely contacted the right place. Dr. Goldsmith has been practicing family dentistry for over X years. He’s extremely patient and kind, also very gentle. Everybody really likes him, and I sincerely think you will to.

Before we find you a date and time that works for your schedule, can I answer any initial questions prior to scheduling?

SALLY: Do you take XYZ insurance?

ME: Absolutely! We are an in-network provider for XYZ insurance, so you will be able to enjoy all the in-network benefits available to you. Speaking of which, I’d be happy to provide you a summary of your benefits at our office prior to your visit. Would that be of interest to you?

SALLY: Sure, that would be great. No one has ever offered that.

ME: We always try to be as transparent as possible and find it very beneficial when our patients understand their insurance benefits. That way they know well ahead of any appointment what their out of pocket expense might be. (Collect insurance information)

I’ll have that ready for you when you arrive and we will review it together, sound good?

SALLY: Yes.

ME: Any other questions I can answer for you before we schedule?

SALLY: No, I think I’m good, let’s go ahead and get an appointment.

ME: Great! Do you prefer a morning or afternoon? (IMPORTANT DETAIL: Notice I ask two questions each step when isolating a day and time that is best for the patient)

SALLY: I like mornings.

ME: Great, early or late morning?

SALLY: Early morning please.

ME: Sure, I’ve got two options next week, one on Tuesday October 28th at 8am and the other on Friday, October 30th at 9am. Which one would you prefer?

(Then I’d go on to collect any pertinent information needed to set up the appointment in our practice management software.)

Any other family members I can schedule at this time?

SALLY: No, I would like to visit the practice myself before scheduling them.

ME: No worries! We’d be happy to schedule them after your initial appointment. Any other questions I can answer before I let you enjoy the rest of your day?

SALLY: No, I’m good.

ME: Awesome, well we certainly look forward to meeting and really appreciate your time today. Would you mind doing me a little favor?

SALLY: Sure.

ME: If something comes up and you’re unable to make this appointment, would you please give us a couple business days notice so that we can find another day and time that would work better for your schedule?

SALLY: Sure.

ME: Great, thank you again so much and I hope you have a wonderful day!

SALLY: Thanks, same to you.

ME: Bye.

SALLY: Bye.