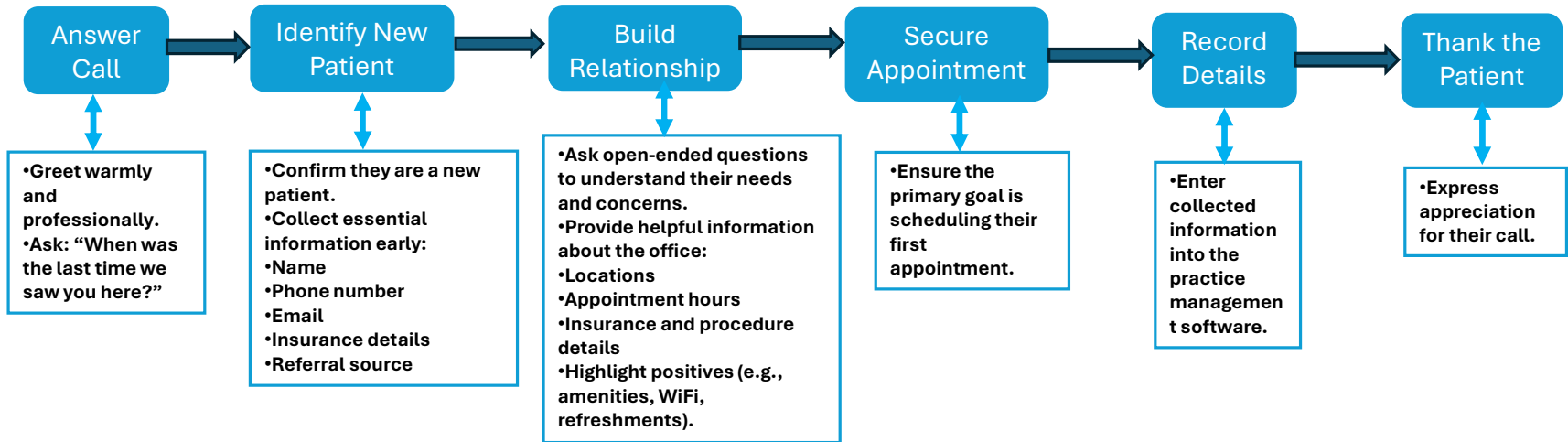# Efficient Phone Call Workflows for Different Kinds of Patients

New Patient Workflow

Answer Call → **Identify New Patient** → **Build Relationship** → **Secure Appointment** → **Record Details** → **Thank the Patient**

- **Answer Call**
  - Greet warmly and professionally.
  - Ask: "When was the last time we saw you here?"

- **Identify New Patient**
  - Confirm they are a new patient.
  - Collect essential information early:
  - Name
  - Phone number
  - Email
  - Insurance details
  - Referral source

- **Build Relationship**
  - Ask open-ended questions to understand their needs and concerns.
  - Provide helpful information about the office:
  - Locations
  - Appointment hours
  - Insurance and procedure details
  - Highlight positives (e.g., amenities, WiFi, refreshments).

- **Secure Appointment**
  - Ensure the primary goal is scheduling their first appointment.

- **Record Details**
  - Enter collected information into the practice management software.

- **Thank the Patient**
  - Express appreciation for their call.

Existing Patient Workflow

Answer Call → **Identify New Patient** → **Update Information** → **Address Inquiry** → **Promote Services** → **Close Call**

- **Answer Call**
  - Greet warmly and professionally.
  - Thank them for calling again.

- **Identify New Patient**
  - Confirm they are existing patient.

- **Update Information**
  - Verify and update phone number and address.

- **Address Inquiry**
  - Resolve their concerns (e.g., scheduling, procedures, billing).

- **Promote Services**
  - Ask, "Is there anything else I can help you with?"
  - Inform about additional services, membership plans, or products.

- **Close Call**
  - Confirm resolution of their inquiry.
  - Thank them for their loyalty.