

3. A new patient arrives in the office...
"Good morning, beautiful day today isn't it? (Insert any phrase that will personalize that first few seconds of the encounter). How may I help you?"
4. An established patient arrives in the office...
"Good afternoon (insert patient name). Welcome back! It's great to see you again. Let's take a moment and make sure your information is up-to-date in your chart..."
5. The patient is departing the office.
"Are there any other questions I can answer?" Thank you so much for coming in today...see you next year!"
6. The phone rings and the patient would like to schedule an appointment.
"I'm happy to do that for you. Our next available appointment time is... (Do not lead with a question about insurance – that is not the priority their appointment is)"
7. The phone rings and the patient would like to schedule their family of 4.
"I am happy to schedule those appointments. The doctor strongly suggests scheduling those appointments over a couple of days. He has found that the third and fourth person to be examined is so fatigued that it is not fair and can impact the accuracy of the exam. But we can certainly work with your schedule."
8. The phone rings and the patient is canceling their appointment.
*"Thank you so much for calling to let us know you won't be able to keep your appointment. May I reschedule you at the same time/day next week?" (If a patient does not want to reschedule) –
"May I ask why you don't want to reschedule your appointment?"*
9. The patient glasses are going to be delayed.
"I am calling with an update on your glasses; I have some good news and not so good news. Your glasses made it all the way through to final inspection but there was a slight flaw in the lens. We expect your glasses to be perfect so we had the lab beginning again. Your order will move to the front of the line so we should have it back within 4 days. I will phone you just as soon as they arrive. Thank you so much for your patience."

10. Confirming an appointment

"I am calling to confirm your appointment for your annual vision and eye health examination, on Tuesday at 3:00 PM. If you are unable to keep your scheduled appointment, please give us a call at 415-555-1212. Otherwise, we'll look forward to seeing you then. Thank you."

(Don't say I am "JUST" calling to confirm your appointment.)

11. Beginning pre-testing.

"Hi, my name is Beth – I will begin the testing for your eye exam today. I will explain each instrument, what we're checking for and why the doctor feels it is important. If you have any questions at any point please don't hesitate to ask me."

12. The patient's glasses are ready to be picked up.

"Hi this is Sam, with Precision Vision Optometry – I have good news! Your glasses have arrived! You are welcome to drop in Monday – Saturday 8:00 AM – 6:00 PM at your convenience. Please allow 15-20 minutes for our optician to fine tune, adjust and fit your glasses on you. If you have any questions please don't hesitate to call us at 916-555-1234."

In each of these situations, the role of the staff member is to connect with the patient. Every interaction between the patient and your staff member allows the opportunity to communicate your practice philosophy and set you apart from others in your community. Staff your practice at the appropriate level to enable your staff the time to communicate your message, market your skills and products then you can provide the care your patients deserve.