

# The Phone Conversion Audit™

Use this audit checklist to improve your first impression and new patient inquiry conversions to fill your day fast!

## Own the Frame

- Control is key
- Strong Leadership

*"Hello, Thank you for calling  
XXX clinic. How can I help  
you today?"*

- **Next step**
  - Move onto the  
system

## The System

Start the system early

1. Rapport
2. Empathy
3. Demonstrate Value
4. Provide "Yes" options
5. Book the appointment

## The Script

- Create your script

## Phone Section 1:

Rapport and establishing the reason for the call

## Goal:

To build trust and own the frame

## Suggested Script:

*"Thank you so much for your call, what is it that you need help with?"*

## Auditors Comments:

Phone Section 2:

Goal:

Show Empathy

To show that you care & give them confidence that they are making the right choice in choosing you

Suggested Script:

*"I'm sorry to hear that. It sounds like that is a real problem for you, we are here to help though."*

Auditors Comments:

Phone Section 3:

Goal:

Demonstrate Higher Value

Show that you are the expert in the area

Suggested Script:

*"You've come to the right place, our team are experts in getting great results with that"*

*"You've come to the right place, we see a lot of X and can help you with it"*

*"Rest assured we are experts in X and can help you"*

Auditors Comments:

Phone Section 4:

Goal:

Scarcity

To organize the appointment while the patient has shown initial interest

Suggested Script:

*"That sounds serious, and we want to help you straight away."*

*"It is very important that you get seen straight away."*

Auditors Comments:

Phone Section 5:

Goal:

Book the appointment  
Present "Yes" Options

To fill the diary

Suggested Script:

*"John, lets organize a time for you.*

*(Present options). When suits you best Monday or Tuesday?*

**Action:** *Narrow it to one day*

*(Present options). On Monday, would you prefer morning or afternoon?*

**Action:** *Narrow it to morning or afternoon*

*(Present option). Great John, would you prefer 10am or 3pm?*

**Action:** *Choose a time*

*(Clear). Great John, we look forward to helping you on (DAY) at (TIME).*

*(Referral Source). Before you go, can I ask who referred you to the practice?"*

**Action:** *Determine referral source*

Auditors Comments: