

Coaching Criteria

Patient Prism Coaching Criteria

To optimally coach each of your calls, Patient Prism has broken each coached call down into four phases. The following items are recommended to be discussed during each phase:

Greeting and First Impression

- Announce name
- Offered assistance
- Inviting/positive tone
- Clear/well-spoken greeting
- State business name

Uncover & Build Relationship

- Collected name & phone number
- Ask about discomfort
- Actively listen to the patient

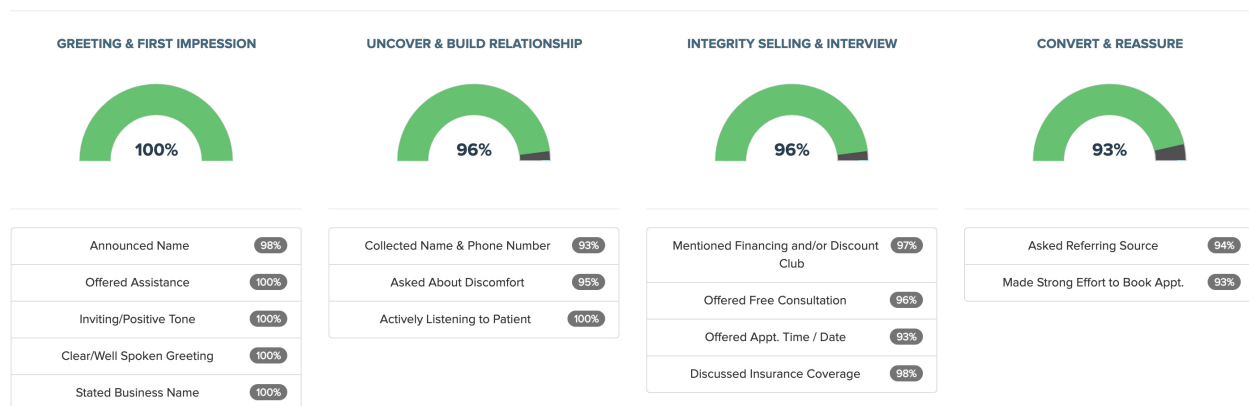
Integrity Selling & Interview

- Mention financing and/or discount club
- Offered a free consultation (if possible)
- Offer appointment time/date
- Discussed insurance coverage

Convert & Reassure

- Asked referring source
- Make strong effort to book appointment

Call Phase Performance



You can opt out of certain call basics if they do not apply to your practice. For instance, we can remove "Offered Free Consultations" for clients who do not offer free consultations. Please contact support or inform your Account Manager in order to make updates to call basics.

Turn missed opportunities into new patient revenue through our Re-Engage Opportunity alerts.

Visit [Support.PatientPrism.com](https://support.patientprism.com) to schedule training with your account manager.