

New Patient Call Scorecard – Team Member Self-Assessment

Setting Our Tone	Did I use the correct greeting?	Yes / No
	Did I provide my name?	Yes / No
	Did I sound friendly, warm and upbeat?	Yes / No
Understanding Our Caller	Did I listen?	Yes / No
	Did I ask how they heard about us or found us?	Yes / No
	Did I ask what the caller's concerns were? Why are they seeking treatment?	Yes / No
	Did I determine the caller's dental health?	Yes / No
	Did I determine which appointment type was most appropriate?	Yes / No
	Did I use effective questioning?	Yes / No
	Did I establish financial responsibility for treatment?	Yes / No
Our Caller's Experience	Did I use language that was appropriate?	Yes / No
	Did I use language that was positive?	Yes / No
	Did I share my knowledge and expertise beyond what the caller has asked?	Yes / No
	Did I demonstrate good telephone manners?	Yes / No
	Did I manage any objections well?	Yes / No
Our Practice	Did I promote our specialist services?	Yes / No
	Did I express true sentiment about our doctor's manner/personality?	Yes / No
	Did I provide information regarding fees?	Yes / No
Our Future Success	Did I identify and provide suitable information that matched the caller needs?	Yes / No
	Did I provide insight into their expected appointment experience and who would look after them?	Yes / No
	Did I attempt to build rapport with the caller?	Yes / No
	Did I make it easy to schedule an appointment without compromising our schedule?	Yes / No
Our Final Impression	Did I summarise the call and advise of any next steps?	Yes / No
	Did I ask if further questions could be answered?	Yes / No
	Did I use the caller's/parents name during the call?	Yes / No
	Did I end the conversation in a personalised manner?	Yes / No

3 areas I performed well:

- 1: _____
- 2: _____
- 3: _____

3 areas I can improve:

- 1: _____
- 2: _____
- 3: _____

Areas of support that could improve my call are:
