

CORE GUIDE #9

CLIENT-READY TRAINING MANUAL

# Orthodontic Phone Scripts That Convert

A practical script manual for new patient calls, scheduling, follow-up, de-escalation, and confident routing.

**GREETING**  
Start strong

**GUIDE**  
Ask clearly

**BOOK**  
Move to action

White-label training manual • Customize with your office details



# How to Use This Guide

This white-label guide is designed as a practical training manual. Use it as a learner workbook, onboarding companion, office training reference, or digital product base. Customize it with your office policies, software screenshots, trainer initials, and state-specific requirements before using it as an internal manual.

<b>Read</b> Move through one section at a time instead of trying to memorize everything at once.	<b>Practice</b> Use the scripts, drills, and checklists until the workflow feels natural.	<b>Customize</b> Add office-specific details, provider direction, and local rules before final use.
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**SCOPE + SAFETY NOTE**

This guide is educational. Follow your office policies, supervising provider direction, state rules, OSHA/CDC guidance, HIPAA privacy requirements, and manufacturer instructions.

## Training Goal

The goal is not to make a new team member sound like an expert on day one. The goal is to help them become organized, safe, coachable, clear, and useful in the role.



# Orthodontic Phone Scripts That Convert

A practical script manual for new patient calls, scheduling, follow-up, de-escalation, and confident routing.

## Before You Use These Scripts

This guide is a training tool. Your office policies, state laws, privacy rules, and doctor instructions come first. A good phone script is not a robot voice. It is a safety rail. It helps a new team member stay calm, gather the right information, protect privacy, and move the patient to the next correct step.

## Trainer Note

The goal is not to sound scripted. The goal is to sound prepared. What this guide is for

Helping new hires learn what to say when the phone rings.

Creating consistent language for scheduling, follow-up, and handoffs.

Building confidence without forcing every call to sound identical.

Reducing missed opportunities by making the next step clear. What this guide is not

It is not legal advice.

It is not clinical diagnosis or treatment advice.

It does not replace HIPAA/privacy training.

It does not replace your office's approved consent, texting, or calling policies.

## Quick Checklist

- Use your office-approved privacy and consent language.
- Do not give clinical diagnosis by phone.
- Document important call details in the correct system.
- Route clinical concerns to the clinical team.
- Route financial or insurance concerns to the correct coordinator.

## Table of Contents

Use this like a field guide: read the front section first, then jump to the call type you need.

- Foundations: phone philosophy, privacy, call formula, tone, logging, greeting
- New Patient Calls: inquiry, price shoppers, insurance, consult scheduling
- Schedule Management: confirmations, no-show prevention, late arrivals, reschedules, no-show recovery



- Existing Patient Calls: routine scheduling, repairs, retainer issues, transfers, adults, parents, teens, aligners
- Handoffs and Follow-Up: TC handoffs, pending consults, same-day starts, observation recall, reviews
- Hard Calls: upset callers and doctor requests
- Message Templates: voicemail, text, and email
- Training Tools: script upgrades, what not to say, cheat sheet, role-play drills, scorecard, practice plan, sign-off

ladder

## Best Practice

Print this guide and keep it near the front desk during training. Highlight the scripts your office uses most, then customize the bracketed parts with your practice name, doctor's name, scheduling options, and preferred handoff process.

## FOUNDATIONS

Build a clear phone voice before learning the individual scripts.

- The This guide Phone Philosophy

The phone is not an interruption. It is the front door. In orthodontics, the first phone call can shape how a family feels about the entire practice. The caller may be nervous, price-shopping, confused, embarrassed, or excited. Your job is to bring calm, clarity, and direction.

## Trainer Note

A caller may forget the exact words you used. They will remember whether you sounded rushed, annoyed, confused, or confident. Conversion does not mean pressure. In this guide, conversion means helping the right person take the right next step. That next step might be a consultation, a repair appointment, a treatment coordinator call, a financial handoff, or a clinical review. The phone should never feel like a pushy sales pitch. It should feel like a confident guide. The four wins of a strong call

The patient feels heard.

The office gathers enough information to help.

The next step is clear.

The call is documented so the team can follow through. The front desk promise Every call should communicate this without saying it directly: We are organized. We care. We know what to do next.

## Practice Drill

Listen to three practice calls or role-play recordings. After each one, ask: Did the caller feel guided? Did the team member control the call kindly? Was the next step clear?



- Compliance and Privacy Guardrails

Protecting patient trust is part of the script.

Orthodontic phone work often includes personal information. The safest habit is to say only what is needed, verify identity when appropriate, and follow office policy before discussing details.

## Minimum necessary mindset

When privacy rules apply, staff should avoid sharing unnecessary protected information. Keep phone messages and public conversations simple, especially when you do not know who may hear them.

Marketing vs. healthcare messages Appointment reminders and confirmations are different from marketing. Marketing, advertising, automated calls, and texts may trigger additional consent rules. Always follow your office's approved communication policy.

## Safe phone habits

Do not announce private details out loud in the lobby.

Do not leave detailed treatment, balance, or diagnosis information on voicemail unless office policy allows it.

Confirm the caller before discussing account-specific details.

Use approved texting systems and approved language only.

Honor opt-out and communication preference requests according to office policy.

## Privacy-safe reminder language

Hi, this is [Name] calling from [Practice Name]. We are calling with a reminder about an upcoming appointment. Please call us back at [phone number] if you have any questions. Thank you. Why it works: It identifies the practice, gives a reason, and avoids unnecessary details.

## Verification language

I can help with that. Before I discuss appointment or account details, may I confirm [patient name] and [approved verification item]? Why it works: It creates a respectful privacy check without sounding suspicious.

## Quick Checklist

- Keep voicemails simple.
- Verify identity before discussing details.
- Avoid clinical advice beyond approved instructions.
- Use approved text/phone systems.



- Ask a supervisor when unsure.
- The This guide Call Formula

A simple flow for almost every orthodontic call. Scripts work best when they follow a consistent structure. This formula gives new hires a map without making them sound stiff. The 6-step call formula

- Greet - Smile before you speak and identify the practice.
- Listen - Let the caller explain why they called.
- Clarify - Ask one or two focused questions.
- Guide - Explain the next best step.
- Confirm - Repeat date, time, location, or handoff.
- Close - End warmly and document the call.

## The control sentence

When a call starts to wander, use: I can help with that. Let me ask one quick question so I can point you in the right direction.

## The handoff sentence

When the caller needs another team member, use: The best person to help with that is [role/name]. I am going to get you connected so you do not have to repeat everything. Universal call control script Absolutely, I can help. Let me make sure I understand what you need, then I will get you to the right next step. Why it works: It reassures the caller while giving the team member control of the conversation.

## Practice Drill

Role-play five random call types. In each call, force yourself to use the six steps: greet, listen, clarify, guide, confirm, close.

- Voice Standards and Tone Control

People can hear your energy before they understand your words. Your tone can calm a nervous parent, build trust with a new patient, or make an upset caller feel dismissed. Phone confidence is a skill you can practice.

## The This guide voice

Warm - the caller feels welcome.

Clear - the caller understands the next step.

Steady - your voice does not panic when the call gets hard.

Respectful - you do not talk down to the caller.



Professional - you do not overshare or complain.

## Pacing rule

Slow down when giving dates, times, prices, instructions, or phone numbers. Speed creates mistakes.

## Smile rule

Smile before answering. It changes your tone even when the caller cannot see you.

## Tone reset sentence

I want to make sure I help you correctly. Let me slow down and check the best option for you. Why it works: It recovers the call when you feel rushed or uncertain.

## Quick Checklist

- Use the caller's name when appropriate.
- Avoid sighing, rushing, or talking over people.
- Pause before answering hard questions.
- Say what you can do before saying what you cannot do.
- Call Logging and Handoff Notes

If it is not documented, the next person may have to start over. Good call notes protect the patient experience. They help the clinical team, treatment coordinator, insurance coordinator, and front desk understand what happened without guessing. A strong phone note includes

Who called and their relationship to the patient.

Reason for the call.

Key concern or question.

Action taken.

Next step promised.

Who was notified or assigned.

## Use neutral language

Write facts, not attitude. Instead of 'mom was difficult,' write 'parent expressed frustration about appointment availability and requested a supervisor call.' Good notes save time. A detailed note turns the next call from 'What happened?' into 'I see the note. I can help.'

## Handoff note template



**Caller: [name/relationship]**

**Reason: [brief reason]**

Concern: [what they need] Action taken: [scheduled / transferred / message sent / routed] Next step: [who will follow up and when] Notes: [important details only] Why it works: It gives the team enough context without writing a paragraph of emotion.

## Practice Drill

Take three sample call scenarios and write one bad note and one professional note for each. Compare them with a trainer.

- Universal Greeting Script

The first ten seconds decide whether the caller feels safe. A strong greeting should be short, warm, and easy to understand. Avoid long greetings that make the caller wait to speak.

## The goal

Identify the practice, identify yourself, and invite the caller to speak.

## Recommended greeting

Good morning, thank you for calling [Practice Name]. This is [Name]. How may I help you? If the phone rings during a busy moment Do not let the stress come through your voice. The caller does not know what is happening in the office.

## Standard greeting

Good morning, thank you for calling [Practice Name]. This is [Name]. How may I help you? Why it works: It is warm, quick, and professional. If you must place caller on hold I can help with that. May I place you on a brief hold while I pull up the correct information? Why it works: Asking permission makes the hold feel respectful.

## Returning from hold

Thank you for holding. I appreciate your patience. I found the information we need. Why it works: It resets the call and acknowledges the caller's time.

## Quick Checklist

- Say the practice name clearly.
- Say your name clearly.
- Do not sound rushed.





- Ask before placing on hold.
- Thank the caller when returning.

## NEW PATIENT

### CALLS

Guide first-time callers from curiosity to the correct consultation or handoff.

- New Patient Inquiry Script

Turn curiosity into a scheduled next step. A new patient call is not just information gathering. It is the first trust-building moment. The caller may be comparing offices, worried about cost, or unsure if orthodontics is right for them.

### Your objective

Collect basic information, understand the reason for interest, explain the consult process, and schedule the consultation if appropriate.

### Information to collect

Patient name and age.

Parent/guardian name if minor.

Best phone and email.

Main concern or reason for calling.

Referral source.

Insurance status if your office collects it before consult.

Preferred appointment times. New patient call opener We would be happy to help. Is this for yourself or for your child? Great. May I get the patient's name and age? What made you reach out to us today - braces, aligners, spacing, bite concerns, or just wanting an orthodontic evaluation? Why it works: It opens the conversation without overwhelming the caller.

### Consult value statement

The first step is a consultation so our team can understand your concerns, take the appropriate records if needed, and review the best next steps with you. Why it works: It makes the appointment sound valuable rather than routine.

### Scheduling close



I have [day/time] or [day/time] available. Which works better for you? Why it works: Offering two options makes scheduling easier than asking 'When do you want to come in?'

## Practice Drill

Role-play with one person acting as a busy parent, one as a nervous adult patient, and one as a price shopper. Practice guiding all three to the next step.

- Cost and Price Shopper Calls

Do not dodge cost. Reframe it toward a personalized consultation. Many callers start with 'How much are braces?' They are not always being difficult. Often, they are trying to understand if treatment is possible for their family.

## Trainer Note

Price shoppers are not the enemy. Some of them become loyal patients when they feel respected and not rushed. The mistake to avoid Do not sound annoyed. Do not say 'We cannot tell you that' in a cold way. Do not give a random quote if your office requires an exam and treatment plan first.

## The better response

Acknowledge the question, explain that cost depends on the individual plan, and invite them to the consult where options can be reviewed.

## Key phrase

The best way to give you accurate information is to see what type of treatment is actually needed.

## Braces cost script

That is a great question, and it is one most families ask. The cost can depend on the type of treatment, treatment length, insurance benefits, and payment options. The best first step is a consultation so we can give you accurate information instead of guessing. I can help you schedule that. Why it works: It respects the cost question while avoiding an inaccurate quote.

If they insist on a range I understand you are trying to plan. Our team reviews fees after the doctor has evaluated the case, because each treatment plan can be different. What I can do today is get you scheduled for the consult so you can receive the most accurate options. Why it works: It holds the boundary while still helping. If they say they are calling around That makes sense. Orthodontic treatment is a big decision. I would encourage you to compare not just price, but also the doctor's recommendations, payment options, and how comfortable you feel with the team. Would you like to reserve a consultation time with us so you have real numbers to compare? Why it works: It positions the office as helpful and confident.

- Insurance Questions



Answer what you can. Route what requires verification. Insurance questions can become confusing fast. The front desk should know how to collect information and hand off to the insurance coordinator without guessing. Safe front desk goal Do not promise coverage before benefits are verified. Gather information, explain the process, and connect the patient to the right team member.

## Information to collect

Insurance company name.

Subscriber name and date of birth if office policy allows.

Patient name and date of birth.

Member or group ID if needed.

Best callback number.

Whether the patient has orthodontic benefits.

## Words to avoid

Avoid saying 'Your insurance will cover it' unless the responsible coordinator has confirmed it and the office policy allows that language.

## General insurance script

We can definitely help review insurance information. Orthodontic benefits can vary by plan, so our insurance team verifies details before giving an estimate. I can collect your information and have the correct team member review it. Why it works: It avoids promising benefits while keeping the process helpful.

## Insurance handoff

The best person to review that is our insurance coordinator. I will send this information to [Name/role], and they can confirm what we are able to verify before your consultation. Why it works: It sets expectations and prevents front desk guessing. If caller asks 'Do you take my insurance?' We work with many plans, but the best answer depends on your specific benefits. May I collect your insurance information so our team can check it properly? Why it works: It moves from yes/no confusion into a useful next step.

## Quick Checklist

- Never guarantee benefits without verification.
- Use the office's approved insurance intake process.
- Clarify that estimates are not guarantees if office policy requires it.
- Document who will follow up.



- Scheduling the Consultation

Make the appointment feel important, simple, and confirmed. A scheduled consultation is a conversion milestone. The caller needs to know when to arrive, what to bring, what to expect, and how to contact the office if something changes.

## Consult scheduling flow

Confirm patient name and contact information.

Offer two appointment options.

Confirm date, time, location, and arrival expectations.

Explain what to bring.

Tell them they will receive a reminder if your office sends one.

Document referral source and main concern.

Make the appointment sticky People are more likely to show when they understand why the visit matters and what happens during it.

## Consult booking script

Perfect. I have [day/time] or [day/time] available for the consultation. Which one is better for your schedule? Great, I have [patient name] scheduled for [date/time]. Please bring [items your office requires]. We will see you at [location]. Why it works: It gives options, confirms the details, and reduces confusion.

## Expectation script

During the visit, our team will get to know your concerns, review the orthodontic options, and help you understand the next step. You do not need to know everything before you come in. Why it works: It reduces anxiety for first-time callers.

## Practice Drill

Practice saying appointment times slowly. A good test: the caller should be able to repeat the date and time back without asking twice.

## SCHEDULE

### MANAGEMENT

Protect the schedule while staying helpful and patient-centered.

- Confirmation Scripts



Confirmation is not just a reminder. It protects the schedule. Missed consultations and late arrivals cost the office time. Strong confirmation language helps patients remember, prepare, and call early if they need to change.

## Confirmation should include

Practice name.

Patient name if privacy policy allows.

Date and time.

Arrival instructions.

What to bring.

How to cancel or reschedule.

Short, privacy-safe language.

## Reminder tone

Friendly but clear. Do not sound like you are apologizing for reminding them.

## Phone confirmation

Hi, this is [Name] from [Practice Name] calling to confirm [patient name]'s appointment on [day] at [time]. Please arrive [arrival instruction] and bring [items]. If anything changes, call us at [phone number]. We look forward to seeing you. Why it works: It confirms essentials without making the call too long.

## Short text confirmation

[Practice Name]: Reminder for [first name]'s appointment on [day] at [time]. Please call [phone] with questions or changes. Reply STOP to opt out. Why it works: It is short and structured, but offices should use approved texting policies and language.

Confirmation with action request Hi, this is [Practice Name]. We are confirming your appointment on [day/time]. Please reply C to confirm or call us if you need to make a change. Why it works: It prompts a response and helps the schedule team know who is confirmed.

## Quick Checklist

- Use approved messaging system.
- Keep texts concise.
- Avoid sensitive details when unnecessary.
- Honor opt-out policies.



- No-Show Prevention

Make the appointment easier to keep. No-show prevention starts before the appointment. The goal is to make the patient understand the value of the visit and the importance of communicating early.

## Prevention language

Give the caller a clear reason to keep the appointment. Example: This time is reserved specifically for you so the team can review your concerns and next steps.

## Barrier question

If the patient seems unsure, ask: Is there anything about the time, location, or paperwork that might make it hard to keep this appointment?

## Friendly boundary

It is okay to be kind and firm. The schedule matters.

## Appointment value script

We have this time reserved for you so our team can focus on your orthodontic questions and next steps. If anything changes, please call us as early as possible so we can help you reschedule. Why it works: It makes the appointment feel intentional.

## Barrier check script

Before I finalize that time, does the location or time work well for you, or would another option be easier to keep? Why it works: It catches scheduling problems before they become no-shows.

## Practice Drill

Role-play a caller who sounds hesitant. Practice asking the barrier question without sounding judgmental.

- Late Arrival Script

Kind, clear, and schedule-aware. Late arrivals are common. The front desk should protect the schedule while treating the patient with respect.

## What to determine

How late they expect to be.

Appointment type.

Doctor/team availability.

Whether the visit can still be completed.



Whether rescheduling is needed. Do not promise without checking. Even if the patient says they are only ten minutes away, check the schedule rules or ask the lead before guaranteeing they can still be seen.

## Late call script

Thank you for letting us know. About how many minutes away are you? Let me check the schedule and appointment type so I can give you the best answer. Please hold for one moment. Why it works: It acknowledges the caller while protecting the schedule. If they can still be seen: We can still see you today, but we may need to adjust what we can complete during the visit. Please come straight in when you arrive, and we will do our best to keep things moving. Why it works: It sets realistic expectations.

If rescheduling is needed: Because of the appointment type and today's schedule, we will need to reschedule so the team has enough time to take care of you properly. I can help find the next available option. Why it works: It frames rescheduling around quality, not punishment.

- Reschedule and Cancellation Script

Save the relationship and protect the schedule. A reschedule call should not sound like a penalty. It should sound like a clear process. The goal is to keep the patient connected to care.

## Reschedule flow

Acknowledge the request.

Check appointment type and availability.

Offer two replacement options.

Confirm the new date/time.

Document the reason if your office tracks it.

## Cancellation warning signs

If a new patient cancels without rescheduling, they may be slipping out of the pipeline. Offer to help them choose a better time before ending the call.

## Reschedule script

No problem, I can help you look at options. Let me check the schedule for that appointment type. I have [option 1] or [option 2]. Which works better? Why it works: It keeps the call moving.

## Cancel without reschedule

I understand. Before I cancel it completely, would it be helpful to look at a later date? That way you do not lose momentum if you still want to be seen. Why it works: It gently protects the lead without pressure.

## Repeated reschedule



I can help you reschedule. I also want to make sure we choose a time that truly works so the doctor and team have the right time reserved for you. Why it works: It sets a boundary without scolding.

- No-Show Recovery Script

Recover the patient without guilt-tripping them. A no-show recovery call should be calm and helpful. The goal is to reconnect, reschedule if appropriate, and update the record. What not to do Do not shame the caller. Do not say, 'You missed your appointment' in an accusatory tone. Keep it professional.

## What to do

State that the office missed them, ask if they would like to reschedule, and offer options. If there is a fee or policy Follow the office-approved policy and language. Do not improvise financial penalties. New patient no-show recovery Hi, this is [Name] from [Practice Name]. We missed you for your consultation today and wanted to check in. Would you like help rescheduling? Why it works: It is simple and nonjudgmental. Existing patient no-show recovery Hi, this is [Name] from [Practice Name]. We missed [patient name] for today's appointment. Please call us at [phone number] so we can help get the appointment rescheduled. Why it works: It focuses on returning to care.

## Second attempt voicemail

Hi, this is [Name] from [Practice Name]. We are following up again to help reschedule the missed appointment. Please call us at [phone number]. Thank you. Why it works: It keeps the tone consistent.

## Quick Checklist

- Document the no-show.
- Document contact attempt.
- Follow office policy for fees or dismissal rules.
- Notify appropriate team member if urgent.

## EXISTING

## PATIENT CALLS

Route routine, repair, retainer, transfer, parent, teen, adult, and aligner calls correctly.

- Existing Patient Scheduling

Know the difference between routine and problem calls. Existing patients may need adjustments, progress visits, appliance checks, records, debond, retainer checks, or emergency-style repair visits. The front desk needs to know how to route calls correctly. Scheduling questions to ask

What type of appointment are you trying to schedule?

Were you told to come back in a certain number of weeks?





Is there anything broken, poking, loose, or uncomfortable?

Did the doctor or assistant give a specific instruction at the last visit?

## Avoid guessing

If the caller cannot explain what is needed, check the chart or ask the clinical team before scheduling the wrong appointment type.

## Routine scheduling script

I can help with that. Let me check the appointment type recommended from the last visit and find the right time for you. Why it works: It avoids scheduling the wrong appointment.

## Unclear appointment script

I want to make sure we schedule enough time for the correct visit. Let me review the notes or check with the clinical team before I place you on the schedule. Why it works: It protects the office flow.

## Practice Drill

Practice reading fake chart notes and deciding whether the call should be scheduled directly or routed to clinical review.

- Repair and Discomfort Calls

Gather information, do not diagnose. Broken brackets, poking wires, loose appliances, discomfort, and lost elastics happen. The front desk should collect facts and route according to office policy.

## Questions to ask

What seems broken, loose, or uncomfortable?

When did it start?

Is anything poking or causing irritation?

Is the patient able to eat and drink?

Is there swelling, injury, bleeding, or severe pain? If yes, follow urgent office protocol.

## Important boundary

Do not give clinical diagnosis or instructions beyond approved office language. When in doubt, ask the clinical team.

## Repair triage opener



I am sorry that is happening. I am going to ask a few quick questions so I can route this correctly. What seems broken, loose, or uncomfortable? Why it works: It calms the caller and starts the intake.

## Clinical handoff

Thank you for explaining that. I am going to have the clinical team review this so we can decide the best next step. May I place you on a brief hold or call you back at [number]? Why it works: It avoids unauthorized advice.

## Urgent concern boundary

Because you mentioned [swelling/injury/bleeding/severe pain], I want to involve the clinical team right away and follow our office protocol. Why it works: It flags higher-risk situations.

## Quick Checklist

- Do not diagnose.
- Ask what, when, severity, and contact details.
- Follow office repair protocol.
- Route urgent concerns immediately.
- Document the call.
- Lost or Broken Retainer Calls

Move fast because teeth can shift. A lost or broken retainer can be time-sensitive. The front desk should avoid blame and help the patient get back on the schedule.

## Key message

A retainer issue is not just an inconvenience. The sooner the office evaluates it, the better the chance of protecting the result.

## Questions to ask

Is the retainer lost, cracked, bent, or not fitting?

When did it happen?

Upper, lower, or both?

Is the patient able to wear any part of it comfortably?

Was it made by this office or another office?

## Lost retainer script



I can help. Retainers are important because teeth can begin to shift when they are not being worn. Let me get some details and find the right appointment option for you. Why it works: It creates urgency without panic.

## Broken retainer script

Please do not force it if it feels bent, sharp, or uncomfortable. I will note what happened and help get this reviewed by the team. Why it works: It avoids harm and routes appropriately.

## Replacement cost boundary

Replacement fees can depend on the type of retainer and what is needed. The team can review that with you before moving forward. Why it works: It avoids guessing at fees.

- Transfer Patient Script

A transfer patient needs clarity, records, and expectations. Transfer patients may already be in braces or aligners. They may be moving, unhappy with another office, or trying to continue treatment. These calls require careful expectation setting.

## What to gather

Current treatment status.

Current orthodontist/practice name.

Reason for transfer.

Whether records are available.

Current appliance type.

Insurance/payment questions.

Urgent concerns or timeline.

## Set expectations

The doctor may need records and an exam before confirming treatment options, fees, or timeline.

## Transfer inquiry script

We can help explain the transfer process. Because each case is different, the doctor will need to review your current treatment status and records before confirming next steps. I can help schedule a transfer consultation and explain what to bring. Why it works: It sets professional expectations.

## Records request language



If possible, please request your current records from your previous orthodontic office, including photos, X-rays, treatment notes, and appliance information. Our team can let you know exactly what is needed.

Why it works: It prepares the patient for a smoother transfer.

- Parent, Teen, and Adult Patient Language

Different callers need different reassurance. Orthodontic calls may involve parents, teenagers, adult patients, grandparents, or spouses. Use language that respects the caller while protecting privacy.

## Parent callers

Parents often need clarity, cost expectations, school scheduling, and reassurance that their child will be treated kindly.

## Teen callers

Teenagers may be nervous or unsure. Keep language simple and respectful. Verify office policy before discussing details with minors.

## Adult patients

Adult patients may be concerned about appearance, work schedules, treatment length, or aligner options.

## Parent reassurance

We work with many families who are just starting this process. The consultation is designed to answer your questions and help you understand what your child may need. Why it works: It lowers stress.

## Adult patient reassurance

A lot of adults explore orthodontic treatment for health, function, or confidence reasons. The consultation will help us see what options may fit your goals and lifestyle. Why it works: It respects adult motivations.

## Teen-friendly language

No worries, we can help walk you through it. Let me check what information we need and make sure we get you to the right person. Why it works: It keeps the tone human and approachable.

- Aligner Inquiry Script

Guide interest without promising eligibility.

Many callers ask about clear aligners first. The front desk can explain that aligners may be an option, but the doctor must evaluate the case.

## What to avoid



Do not say someone is definitely a candidate without an exam. Do not compare products in a way your doctor has not approved.

## What to say

Acknowledge the interest, explain that the doctor reviews fit and treatment goals, and schedule the consultation.

## Good clarifying questions

Are you interested in clear aligners for yourself or your child?

Have you had orthodontic treatment before?

Are you looking for a cosmetic improvement, bite correction, or both?

## Aligner inquiry

Clear aligners may be an option for many patients, but the best way to know is to have the doctor evaluate your teeth, bite, and goals. We can schedule a consultation and review what options fit your case. Why it works: It encourages the consult without overpromising. Braces vs. aligners question That is something the doctor can review with you after seeing the case. Some patients are good candidates for aligners, some do better with braces, and some may have more than one option. Why it works: It keeps the answer accurate and balanced.

## HANDOFFS AND

## FOLLOW-UP

Use warm transfers and organized follow-up to keep patients moving.

- Treatment Coordinator Warm Handoff

Do not make the patient repeat everything. A warm handoff makes the practice feel connected. It shows the patient that the team communicates internally.

## Warm handoff formula

Tell the patient who you are connecting them with.

Tell the teammate the patient's name and reason for call.

Summarize the key concern in one sentence.

Confirm the patient is connected before leaving the line if possible.

## Cold handoff problem



A cold transfer makes patients repeat their story and can make the office feel disorganized.

## Warm transfer to TC

The best person to help with the consultation details is our treatment coordinator. I am going to connect you with [Name]. I will let them know you are calling about [main concern] so you do not have to start over. Why it works: It protects the patient experience.

## If TC is unavailable

[Name] is with a patient right now, but I can send a detailed message and ask them to call you back. What is the best number and time to reach you? Why it works: It creates a clear callback plan.

## Practice Drill

Role-play three handoffs: new patient consult, insurance concern, and pending treatment start. Practice summarizing in one sentence.

- Pending Consult Follow-Up

Follow-up is service, not begging.

Pending patients often need time, clarity, or help overcoming a barrier. Follow-up scripts should be respectful, helpful, and organized.

## Common pending reasons

Need to talk to spouse/parent.

Need to review finances.

Need to compare offices.

Need to check insurance.

Need to wait for school/work schedule.

Not emotionally ready to start.

## Follow-up mindset

You are not chasing. You are guiding someone who already raised their hand.

## First pending follow-up

Hi, this is [Name] from [Practice Name]. I am following up after your consultation to see what questions came up and whether there is anything we can clarify for you. Why it works: It opens the door without pressure.



## Barrier question

What would help you feel more comfortable with the next step - scheduling, payment options, insurance, or understanding the treatment plan? Why it works: It identifies the true obstacle. Close to next step  
Would it be helpful to schedule a quick call with [TC/financial coordinator] so we can answer those questions and help you decide? Why it works: It moves the conversation forward.

- Same-Day Start Invitation

Offer convenience without pressure. Same-day starts can be a strong patient experience when the office is prepared. The language should feel helpful, not pushy.

## When to use

Use only when the doctor and office workflow allow it, and when the patient has received the right information to decide.

## Tone

Position same-day start as an available convenience, not a demand.

## Key phrase

If you feel ready and the doctor confirms the plan, we may be able to begin today. Same-day start soft offer If the doctor confirms that treatment is ready to begin and you feel comfortable with the plan, we may have the option to start today. There is no pressure - we just like families to know when that option is available. Why it works: It keeps the offer patient-centered. If patient needs time That is completely okay. Orthodontic treatment is a decision, and we want you to feel comfortable. We can help you schedule a start date when you are ready. Why it works: It preserves trust.

## Quick Checklist

- Only offer if office workflow supports it.
- Confirm financial and consent steps.
- Do not pressure.
- Document patient decision.
- Observation and Recall Script

Stay connected before treatment begins. Observation patients may not be ready for treatment yet, but they are still active relationships. Clear recall language keeps families engaged.

## Observation call goal

Remind the family why the visit matters, schedule the recall, and keep them connected to the practice.



## Common concern

Parents may ask why they need another visit if treatment has not started yet. Explain that growth and tooth eruption can change timing. Do not overexplain clinically. Use approved simple language and let the doctor explain clinical details during the visit.

## Observation recall script

Hi, this is [Name] from [Practice Name]. It is time to schedule [patient name]'s observation visit so the doctor can monitor growth and timing. I have [option 1] or [option 2]. Which works better? Why it works: It makes recall sound purposeful. If parent asks why The doctor is monitoring timing, growth, and tooth development so treatment can begin when it is most appropriate. The visit helps us keep an eye on those changes. Why it works: It gives a simple, non-technical reason.

- Review and Referral Request Script

Ask at the right moment with the right tone. Happy patients can help the practice grow. The key is to ask respectfully and only when the moment feels appropriate. Best moments to ask

After a positive visit.

After a parent gives a compliment.

After debond or retainer delivery.

After a problem was solved well.

After a patient says they are happy with the office.

## Avoid

Do not pressure patients. Do not ask when they are upset, confused, or rushed.

## Review ask

We are so glad you had a great experience. If you feel comfortable, a review would mean a lot to our team and helps other families find us. Why it works: It is simple and gratitude-based.

## Referral ask

If you know another family looking for an orthodontic office, we would be honored if you shared our name. Why it works: It is warm and not pushy.

## Practice Drill

Practice asking for a review in a natural voice. If it sounds forced, shorten the sentence.

## HARD CALLS





Stay calm when callers are frustrated, confused, or asking for the doctor.

- Upset Caller De-escalation

Lower the temperature before solving the problem. Upset callers do not always need an instant solution first. Many need to feel heard before they can hear the solution.

## The de-escalation steps

Let them speak without interrupting.

Acknowledge the emotion.

Clarify the issue.

Take ownership of the next step, not necessarily the problem.

Route to the correct person.

Document objectively.

## Tone rule

Do not match their volume. Lower your pace. Speak clearly. Avoid defensive language.

## What to avoid

Avoid saying: Calm down, that is not our fault, you should have, or I do not know.

## Upset caller opener

I hear that you are frustrated, and I am sorry this has been stressful. I want to understand what happened so I can get this to the right person. Why it works: It validates without admitting fault or arguing.

## Clarifying question

Can you help me understand what you expected to happen and what happened instead? Why it works: It moves the caller from emotion into details.

## Supervisor route

I want to make sure this is handled properly. I am going to send this to [manager/doctor/TC] with clear notes and ask them to follow up. Why it works: It gives a concrete next step.

## Quick Checklist

- Do not argue.
- Do not blame another team member.



- Do not promise what you cannot control.
- Document facts.
- Notify supervisor if needed.
- The Caller Wants the Doctor

Respect the request and protect the doctor's time. Some callers ask directly for the doctor. The front desk should not block care, but should gather enough information to route the request properly.

## What to say

Acknowledge the request, ask a clarifying question, and explain the best process for getting the concern handled.

## Why it matters

Many doctor requests can be handled faster by the clinical lead, treatment coordinator, or office manager. But serious clinical concerns should be escalated according to office policy.

## Doctor request script

I can definitely note that you would like to speak with the doctor. May I ask what the call is regarding so I can make sure it is routed correctly and handled as quickly as possible? Why it works: It respects the caller while gathering context. If doctor is unavailable The doctor is with patients right now. I can send a detailed message with your concern, and the appropriate team member will follow up according to our office process. Why it works: It sets a realistic boundary.

## MESSAGE

## TEMPLATES

Use short, approved language for voicemail, text, and email.

- Voicemail Templates

Short, clear, and privacy-conscious. Voicemail should be simple. The caller may not be the only person who hears it. Use approved office policies for patient details.

## Voicemail basics

State your name and practice.

Give a brief reason.

Provide callback number.

Avoid unnecessary clinical, financial, or treatment details.



Speak slowly when saying the phone number.

## New patient voicemail

Hi, this is [Name] calling from [Practice Name]. We are returning your call about scheduling a consultation. Please call us back at [phone number]. Thank you. Why it works: It is short and safe.

## Appointment reminder voicemail

Hi, this is [Name] from [Practice Name] calling with an appointment reminder. Please call us at [phone number] if you have any questions or need to make a change. Why it works: It avoids unnecessary details.

## Pending follow-up voicemail

Hi, this is [Name] from [Practice Name]. I am following up after your recent visit. Please call us back at [phone number] when you have a moment. Why it works: It protects privacy.

## Repair callback voicemail

Hi, this is [Name] from [Practice Name]. We are returning your call. Please call us back at [phone number] so we can help with the next step. Why it works: It does not leave detailed clinical content.

- Text Message Templates

Use only with approved systems and office policy. Texts should be short, clear, and appropriate. Do not turn text into a full conversation about private health details unless your office policy and platform allow it. Text rules for new hires

Use approved templates when available.

Keep messages short.

Do not include unnecessary clinical or financial details.

Do not argue by text.

Move complex conversations to a phone call.

## Consult reminder text

[Practice Name]: Reminder for your consultation on [day] at [time]. Call [phone] with questions or changes. Reply STOP to opt out. Why it works: Short and action-oriented.

## Follow-up text

Hi [Name], this is [Practice Name]. We are following up from your recent visit. Please call us at [phone] when convenient. Why it works: Does not include unnecessary details.



## Recall text

[Practice Name]: It is time to schedule your next orthodontic visit. Please call [phone] or reply to request scheduling help. Why it works: Clear and concise.

## Running late response

Thanks for letting us know. Please call [phone] so we can check the schedule and advise on the best next step. Why it works: Moves timing decisions to phone.

## Quick Checklist

- Use approved language.
- Include opt-out when required by office/vendor policy.
- Honor communication preferences.
- Document important exchanges.
- Email Templates

Use email for details that need structure. Email can be useful for consultation instructions, forms, general follow-up, and written next steps. Keep it professional and easy to scan.

## Email tone

Warm, clear, and short. Most patients skim. Use bullets for appointment details and next steps.

## Subject lines

**Your Orthodontic Consultation at [Practice Name]**

**Next Steps From [Practice Name]**

**Scheduling Your Orthodontic Visit**

**Information for Your Upcoming Appointment**

New patient consultation email

**Subject: Your Orthodontic Consultation at [Practice Name]**

**Hi [Name],**

We are excited to welcome you to [Practice Name]. Your consultation is scheduled for [date/time] at [location]. Please bring:



- [Item 1]
- [Item 2]
- [Item 3]

If you need to make a change, call us at [phone].

**Thank you,**

**[Practice Name]**

Why it works: It gives clear details in a scannable format.

## Pending follow-up email

**Subject: Next Steps From [Practice Name]**

**Hi [Name],**

Thank you for visiting with us. We wanted to follow up and see what questions you have about the recommended next step. If it would help, we can schedule a quick call with our team to review options. You can reach us at [phone].

**Thank you,**

**[Practice Name]**

Why it works: It invites questions without pressure.

## TRAINING

### TOOLS

Turn scripts into daily front desk skill through drills, scorecards, and sign-offs.

- Before and After Script Upgrades

Turn weak language into confident language. Small language changes can make the same message sound more professional. This page gives examples new hires can practice.

### Upgrade rule

Do not just remove bad phrases. Replace them with language that gives direction.

### Practice Drill



Read each weak version out loud, then read the stronger version. Notice how the stronger version gives the caller a next step.

## Weak

## Stronger

I do not know. Let me check the correct answer so I do not give you the wrong information. You have to call back. The best next step is to call us at [phone] so we can review the schedule with you. We cannot tell you the cost. Cost depends on the treatment plan, so the consultation gives us the most accurate information. Calm down. I hear that this is frustrating. Let me understand what happened so I can help route this correctly. That is not my department. The best person for that is [role]. I will help connect you or send them a clear message. We are booked. The soonest available options I have are [option 1] and [option 2]. I can also add you to our cancellation list if available.

- What Not to Say

Avoid phrases that create confusion, risk, or pressure. The wrong phrase can make the caller feel dismissed or create a promise the office cannot keep.

## Trainer Note

Professional language protects the patient, the team, and the practice.

## Avoid careless certainty

Your insurance will cover it.

You definitely qualify for aligners.

It will only take this long.

That is not a big deal.

The doctor will definitely do that.

## Avoid blame language

You should have called sooner.

You missed your appointment.

You did not follow instructions.

That is your fault.

## Replace with

Let me review the right next step.



The doctor will evaluate that during the visit.

Coverage depends on the specific plan and verification.

I understand why that is frustrating.

I can help route this correctly.

- Call Flow Cheat Sheet

One page to keep near the phone. When a new hire gets nervous, they can come back to this flow.

## Every call

Greet: Thank you for calling [Practice Name]. This is [Name].

Listen: Let the caller explain.

Clarify: Ask one or two questions.

Guide: Offer the next best step.

Confirm: Repeat date, time, location, callback, or handoff.

Close: Thank the caller and document.

## Best universal phrases

I can help with that.

Let me make sure I understand.

The best next step is...

Let me connect you to the right person.

I want to check before I give you the wrong answer.

Thank you for your patience.

## Quick Checklist

- Warm greeting.
- No guessing.
- No clinical diagnosis by phone.
- Clear next step.
- Professional notes.
- Role-Play Drill: New Patient



Train the call before the real call. Role-play helps scripts become natural. Do not only read the script. Practice the tone, pause, and next step.

## Scenario

A parent calls and says: My dentist said my child might need braces. I just want to know how much it costs.

## New hire objective

Acknowledge the cost question.

Ask child name/age.

Explain the consultation.

Schedule the consult.

Confirm date/time.

## Trainer listens for

Warm tone.

No random fee quote.

Clear consult value.

Two appointment options.

Strong close.

## Practice response

That is a great question, and many families ask it. Cost can depend on the treatment plan, insurance benefits, and payment options. The best first step is a consultation so we can give you accurate information. Is this for your child? May I get their name and age? Why it works: It handles the question and moves into scheduling.

- Role-Play Drill: Upset Caller

Practice calm before the pressure hits. De-escalation must be trained. New hires should practice upset calls with a trainer before handling them alone.

## Scenario

A parent says: I have called twice and nobody called me back. This is ridiculous.

## New hire objective

Do not get defensive.





Acknowledge frustration.

Clarify what they need.

Create next step.

Document and notify supervisor if needed.

## Trainer listens for

Calm pace.

No blame.

Clear ownership of next step.

Professional handoff.

## Practice response

I hear that you are frustrated, and I am sorry this has been stressful. I want to help get this handled correctly. Can you tell me what you were waiting to hear back about, and what number is best for follow-up? Why it works: It validates, gathers facts, and moves toward action.

- Daily Phone Scorecard

Measure the habits that create better calls. A scorecard helps new hires improve without guessing. Use this for self-review or trainer review. Score each area 1-5

Greeting was warm and clear.

Caller reason was understood.

Questions were focused.

No guessing or overpromising.

Privacy was protected.

Next step was clear.

Appointment or handoff was confirmed.

Call note was complete.

## How to use

Pick one improvement target each day. Do not try to fix everything at once.

## Practice Drill



At the end of the day, review three calls with your trainer or office manager. Choose one phrase to improve tomorrow.

- 7-Day New Hire Phone Practice Plan

A simple first-week training path. New hires do not become confident by memorizing everything in one day. Build confidence in small steps.

## Day 1 - Listen

Listen to experienced team members answer calls. Write down greetings, common questions, and how calls are closed.

## Day 2 - Greeting and hold practice

Practice answering, placing on hold, returning from hold, and closing calls.

## Day 3 - New patient intake

Role-play new patient calls and learn required fields.

## Day 4 - Scheduling basics

Practice appointment options, confirmations, and reschedules.

## Day 5 - Repair and clinical routing

Learn what questions to ask and when to involve clinical team.

## Day 6 - Upset caller practice

Role-play frustration, no-shows, and billing confusion.

## Day 7 - Supervised live calls

Take calls while a trainer listens and supports.

## Quick Checklist

- Can answer with correct greeting.
- Can place caller on hold politely.
- Can schedule a consult with confirmation.
- Can route clinical questions.
- Can write a professional call note.
- Trainer Sign-Off Ladder



Use this to move from observing to independent calls. This ladder helps the office know when a new hire is ready for more responsibility.

## Trainer Note

The best front desk team members are not the ones who know everything. They are the ones who know when to ask before guessing.

## Level 1 - Observe

Listens to calls.

Identifies call types.

Writes sample notes.

Learns privacy basics.

## Level 2 - Practice

Role-plays with trainer.

Uses scripts without sounding robotic.

Practices new patient and scheduling calls.

Practices de-escalation language.

## Level 3 - Supervised calls

Answers live calls with trainer nearby.

Places callers on hold before uncertain answers.

Documents correctly.

Accepts correction. Level 4 - Independent with support

Handles routine calls.

Routes complex calls.

Asks for help early.

Maintains tone during pressure.

## FINAL CHECK

Review readiness before a new hire handles the phone independently.

- Final Readiness Checklist



Before a new hire handles the phone independently. Use this checklist as a final confidence review. The new hire can

Answer using the approved greeting.

Collect new patient information.

Schedule a consultation.

Handle basic cost questions without guessing.

Route insurance questions properly.

Confirm appointments clearly.

Reschedule and recover no-shows.

Intake repair/discomfort calls without diagnosing.

Use privacy-safe voicemail language.

Write professional call notes.

De-escalate an upset caller.

Warm-transfer to the correct team member.

## Final reminder

A script is not the goal. The goal is a patient who feels guided and a team that can trust the information you collected.

## Graduation phrase

I do not have to know every answer yet. I do need to stay calm, protect privacy, ask focused questions, and get the patient to the correct next step. Why it works: This is the mindset of a safe and coachable front desk team member.

## Source Notes and Educational Disclaimer

These sources support the role, privacy, and communication guardrails in this guide. This guide is an educational training resource for orthodontic front desk and patient communication workflows. It should be customized to the practice's policies, state rules, privacy program, communication consent process, and scheduling protocols. The U.S. Bureau of Labor Statistics describes dental assistants as providing patient care, taking x-rays where allowed, keeping records, scheduling appointments, and working with billing/payment, while noting that duties vary by state and office. The American Association of Orthodontists describes receptionists as taking phone calls and greeting patients, appointment coordinators as helping patients schedule, confirm, and adjust appointments, treatment coordinators as primary contacts between patient/parent and doctor, and insurance coordinators as communicating with



patients/parents about insurance matters. HHS HIPAA guidance explains the minimum necessary standard: covered entities should take reasonable steps to limit uses and disclosures of protected health information to the minimum necessary for the intended purpose, except where specific exceptions apply. The ADA article 'Follow the Rules When Phoning Patients' explains that healthcare messages like appointment reminders and confirmations must be handled differently from marketing/advertising content and gives practical conditions for healthcare calls/texts, including concise messaging and opt-out considerations. The FCC has issued guidance and orders concerning robocalls and robotexts under the TCPA, including consent and revocation. Practices should rely on their legal/compliance advisors and approved vendors for final call/text policies.

## Customization Note

Before using this guide as an office training tool, update all bracketed placeholders, confirm your approved voicemail/text language, and confirm which team member handles clinical, financial, insurance, and management escalations. Official sources used:

Bureau of Labor Statistics - Dental Assistants, Occupational Outlook Handbook.

American Association of Orthodontists - Orthodontist Office Jobs: Join the Smile-Making Team.

U.S. Department of Health and Human Services - HIPAA Minimum Necessary Requirement.

American Dental Association - Follow the Rules When Phoning Patients.

Federal Communications Commission - TCPA consent and robocall/robotext guidance.

## End of Guide | This guide Training Library



# White-Label Customization Checklist

Before selling, distributing, or using this guide inside an office, personalize it so the training feels like it belongs to the client or practice.

- ✓ Add the office name or client brand to the cover if desired.
- ✓ Insert screenshots of the actual software, portals, forms, or scheduling system used by the office.
- ✓ Add state-specific requirements and role limitations.
- ✓ Add provider preferences, office policies, and escalation rules.
- ✓ Add trainer signature lines or staff initials where sign-off is required.
- ✓ Review all privacy, safety, and scope sections before distribution.
- ✓ Export a clean PDF copy for the learner and a separate editable master for the trainer.

## CLIENT-READY REMINDER

Keep the base guide brand-neutral. Let the buyer add their own logo, tone, screenshots, and office-specific workflow so the product feels custom.