

Phone Score Card

Employee Name: _____

Week of: _____

Call #: _____

Patient Name/Initials: _____

5-Star Experience Ratings (1-5 Stars)

(1 = Needs Improvement, 5 = Excellent)

Category	Description	Score
Greeting & Introduction	Friendly tone, introduced self and practice	
Rapport Building	Warmth, allowed patient to share freely	
Practice & Mission Shared	Explained uniqueness and values	
Listening & Engagement	Let patient speak, showed understanding	
Clear Communication	Used plain terms, gave clear steps	
Appt Setup & Confirmation	Gave and repeated date/time	
Insurance Explanation	Explained insurance relationship	
Encouragement & Invitation	Patient felt welcomed and reassured	

Subtotal (Max 40): _____

Yes / No Checklist (Essential Behaviors)

Question	Yes	No
Built rapport before insurance discussion?	[]	[]
Captured referral source and documented?	[]	[]
Shared type of practice and our mission?	[]	[]
Introduced self and company properly?	[]	[]
Validated and encouraged the patient?	[]	[]
Allowed sharing of past experiences?	[]	[]
Understood patient motivation for visit?	[]	[]
Sent all necessary paperwork?	[]	[]
Made a chart note about the call?	[]	[]
Patient knows what to expect for appointment?	[]	[]
Explained insurance relationship clearly?	[]	[]
Invited to follow social media & website?	[]	[]

Yes Total: ____ / 12

TOTAL SCORE

5-Star Ratings Total: ____ / 40

Yes/No Total: ____ / 12

Overall Score: ____ / 52

Reflection Questions

What went well during this call?

What can be improved for future calls?

Action I'll take to grow in communication:
