

## Greeting – Building Rapport

- A. Introduction: *“Thank you for calling \_\_\_\_\_ ... This is \_\_\_\_\_...  
With whom do I have the pleasure of speaking?”*
- B. Explain Role: *“OK (Pt NAME) ... my job is to help you find relief as quickly as possible...  
Are you a new or existing patient?”*
- C. Who’s Calling?: *“Before we get started may I ask you a couple of questions?”*  
*“Is your pain the result of an auto accident or where you hurt at work?  
(Transfer to ext **8195** for PI or **8057** for WC)*
- D. Referral Source: *“Do you mind if I ask how you heard about us?”*  
(Make sure to ask **IF they haven’t already told you**)
- E. Discovery: *“Talk to me about why you’re calling in today... ”*  
**OR** *“OK [Patient Name] tell me about the pain your experiencing... ”*  
**OR** *“What can we do to help you today?”*  
*“Have you previously tried any conservative treatment for your pain?  
(Injections, physical therapy, chiropractic care, etc.)*
- F. If New PT: *“In order to get you on the schedule, I’ll need a little more information.....”*
  - *DOB*
  - *First and Last name*

**LOOK UP PATIENT WITH THIS ↑↑ INFO TO MAKE SURE THEY DON’T ALREADY EXIST IN INTERGY!**

  - *Street address*
  - *Email address*
  - *Best Phone contact*
- OR** If Existing PT: *“Let me pull up your chart to make sure everything is up to date and let you  
know the soonest appointment available.”*
- G. Closing: *“We appreciate the opportunity to help you and we look forward to seeing  
you at your appointment!”*