

HELLO BRAVE THERAPIST!



Thanks for checking out the Magic Call Script!

Our virtual assistant team turns calls & clicks into clients. Every single day. Therapists want to know how we do it.

We get asked all the time for our secret sauce.

Of course it's not only about the perfect call script. Our virtual intake coordinators get amazing training and support from us. They are also wonderful people. Both of these things make a difference!

But, here's the thing.

Creating a great first impression is vital. A potential client's first interaction with your practice is key to helping them know, like and trust you. A good call script is an important first step in optimizing your intake process.

So why is this a 'magic' call script?

Productive Therapist has worked with hundreds of therapy practices. We've been doing this work for many years. We've distilled our knowledge and experience into a simple call script. It covers every important aspect of an intake call. We are confident this will help you turn more calls into clients.

Try the Magic Call Script for yourself OR give it to your intake coordinator. Tweak it to fit your needs. It's yours to play with!

We know you'll love the results.

Here's to growing your practice,

Uriah Guilford



Uriah Guilford
Head Nerd at Productive Therapist

MAGIC CALL SCRIPT

*The script is numbered to indicate key points in the intake conversation.
Following the script is a brief explanation of each point.*

LIVE ANSWER INTRO: Hello, you've reached (practice name). How can I help you?

If calling for new services: I'm happy to help you with that. May I ask your name?
(Skip to #1)

SCHEDULED/RETURNED CALL INTRO: Hello, this is (your name) calling from (practice name). Is this a good time for you to chat? Okay, great. May I ask your name?

1

Hi (name), I'm so happy you reached out to us. My name is (name) and I'm the Intake Coordinator at (practice name). My job is to answer your questions, get some general background information, and help you get set up with the support you need.

Just in case we get disconnected, what's the best phone number for you? OK, our office is located in (city or general area). Are you familiar with that area?

2

Tell me a little bit about what's bringing you to therapy, so I can help you find the best therapist.

3

And feel free to share any goals you have for therapy.

4

Thank you for sharing that with me. If I'm understanding you correctly, it sounds like (client's words about what the issue is) is really (client's words about how the issue is bothering them). And your goal is to (client's goal).

5

The fact that you've reached out for support shows a lot of courage and self-awareness. The first step to making positive changes is asking for help, so you've made a great decision getting in touch with us.

When therapy is successful, what differences would you like to see in your life?

Based on what you've told me, I have a clinician in mind who I think would be a great match for you. First let's figure out availability.

What are your preferred days/times for an appointment? Or are you looking for the first available appointment?

Okay, great. Based on your availability, I would suggest we schedule you with (therapist name). They specialize in (name a specialty that lines up with the client's needs/preferences) and they have experience working with (name the demographic that is important to the client), so I think they'll be a really good fit for your needs and preferences.

Would (name date/time) work for you?

(IF YOU ARE A PRIVATE-PAY PRACTICE, SKIP TO #6)

Great! Now, are you hoping to use your insurance today?

What type of insurance do you have?

IF CREDENTIALLED: (Therapist name) is credentialed with (name of insurance company). I would recommend reaching out to your insurance company just to verify your benefits and coverage (skip last part if the practice verifies benefits).

IF NOT CREDENTIALLED: (Therapist name) is not credentialed with (name of insurance), so you would be responsible for the fee. However, we're happy to give you a superbill, which is like a receipt that you can send in to your insurance company; it's possible they may reimburse you for some or all of the session fee.

6

The fee is \$_____ for a 50-min session. (\$_____ for 75-min couples therapy sessions). We are able to take credit cards as well as health savings cards. Does this fee fit into your budget?

(If no, see potential questions & scenarios below)

7

Okay, great. You're confirmed for your first appointment with (therapist name) on (date) at (time)! You'll receive an email shortly with our address and a link to fill out our online forms.

Before we wrap up our call, do you have any questions I can answer for you?

Thank you so much for reaching out to us today, (client name). You've made a brave and positive decision to start counseling and we're looking forward to supporting you. Take care.

THE SCRIPT EXPLAINED

- 1** Clarifying your role as the intake coordinator is a good way to make sure the client understands you are NOT a therapist and sets the tone for the goal of the call.
- 2** This is your opportunity to make a connection and help them feel heard. You want them to know that you can help with their problem. If they talk for a long time or go into too much detail, find a point where they take a breath and gently say, "Thank you so much for sharing that with me. That will be great information to share with your therapist at your first session. Let's get that scheduled for you, shall we?"
- 3** Hearing about a clients goals for therapy is a great way to narrow down which therapist to match them with. It's also a good idea to document therapy goals in your EHR for the therapist to reference.
- 4** Paraphrasing the client's own words back to them lets them know that you are actively listening and allowing them the space to confirm or clarify their experience. This is a great way to build rapport and learn more about them so you can match them appropriately.
- 5** Validating the clients experience and making them feel good at this time is very important. We want them to feel understood and that they are in good hands.
- 6** Referencing the session fee and confirming that it fits their budget will help assure that they will keep the appointment or allows them space to say that it may not fit their budget. At this point we can give them options that may be a better fit financially.
- 7** Not all therapy practices choose to require a credit card to hold an appointment for a client using insurance. However, it can reduce the likelihood of no-shows and last-minute cancellations.

POTENTIAL QUESTIONS & SCENARIOS

HOW MUCH WILL MY SESSION COST?

That will depend on which clinician you decide to schedule with and your insurance coverage (if using insurance). Let's figure out who would be the best fit for you and then I'll be able to give you a better idea of the fee.

CLIENT IS EXPECTING TO USE THEIR INSURANCE OR THE FEE IS TOO EXPENSIVE

- We are out of network with all insurances. However, we can provide you with a superbill, which is like a receipt that you can submit to your insurance company for possible reimbursement.
- I'm happy to send you a list of practices in the community that take your insurance (great customer service if you have this info available).
- I'm happy to schedule you with a clinician with a lower session fee (if available).
- Our practice does offer a sliding scale in certain situations. I can look into that and get back to you (if your practice offers that and if the caller qualifies).

WHAT SHOULD I EXPECT FROM MY FIRST SESSION?

In your first session, your therapist will spend some time getting to know you and your goals for therapy. The therapist will ask you questions about your concerns. They'll also ask about any history and background that will help them give you the best care possible.

Most likely, you'll find yourself talking about your current symptoms or struggles, as well as your relationships and goals. Most importantly, this first session will help you feel more comfortable with your therapist. You should feel safe and respected and feel free to ask any questions you have too! If you have any concerns about your first session, please let us know. All of us, including your therapist, want to make sure everything feels right for you.

YOUR NEXT STEPS

- 1 **Customize the script to your practice.**
- 2 **Start using the Magic Call Script.**
- 3 **Check out Intake Accelerator.**

WANT TO **ACCELERATE** YOUR INTAKES?

intake
ACCELERATOR

Intake Accelerator will help you design an intake process that helps you turn more calls & clicks into clients.

ACCESS FOR ONLY \$27



Vanessa Solis, LCSW

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This course is super helpful! Quick, non-overwhelming lessons, and a lot of tangible action steps and suggestions.



Jennifer Laurenza

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Great course! Love that it was streamlined, short, and clear.