

# Intake Coordinator Phone Scripts

Convert More Phone Calls Into Booked Sessions

CloneYourself for Psychologists

Premium Members Resource

## Why Phone Skills Matter

The phone call is often the first human interaction a potential client has with your practice. These first 30-60 seconds can determine whether someone books an appointment or continues searching. These scripts ensure every call creates connection and moves toward booking.

### Script 1: Initial Greeting

"[Practice Name], this is [Name]. How can I help you today?" [When they mention looking for therapy/counseling:] "I'm so glad you called. You've come to the right place. Can I ask what's bringing you to therapy right now—just a sentence or two so I can make sure I connect you with the right person?"

### Script 2: Gathering Basic Information

"Thank you for sharing that. It sounds like you're dealing with a lot, and I want to help you get connected with someone who can support you. Let me gather a few quick details to find the best fit:  
1. What's the best number to reach you? 2. Do you have a preference for telehealth or in-person sessions? 3. Are there specific days or times that work best for your schedule?"

## Script 3: Insurance Questions

"Great question about insurance. We [accept/are out-of-network for] most major insurance plans. Can you tell me who your insurance is with? [If in-network:] "Good news—we're in-network with [insurance]. I'll verify your benefits before your first session so there are no surprises." [If out-of-network:] "While we're not in-network with [insurance], many of our clients get significant reimbursement through their out-of-network benefits. We provide a superbill that makes it easy. Would you like me to explain how that works?"

## Script 4: Booking the Appointment

"Based on what you've shared, I think [Therapist name] would be a great fit for you. They specialize in [relevant specialization] and have helped many clients with similar concerns. [Therapist name] has availability on [Day] at [Time] or [Day] at [Time]. Which works better for you? [After booking:] I'll send you an email with everything you need to know for your first session, including some brief paperwork to complete beforehand. Is there anything else I can help with today?"

## Script 5: When They're Hesitant to Book

"I understand—taking this step can feel like a big decision. Can I ask what's holding you back? [Listen, then respond to their specific concern] What I can tell you is that most people feel nervous before their first appointment, and almost everyone tells us afterward that they wish they'd called sooner. Would it help if I scheduled a brief 15-minute phone consultation first, just so you can get a feel for whether it's the right fit?"

## Phone Handling Best Practices

- ✓ Answer within 3 rings whenever possible
- ✓ Smile while talking—it comes through in your voice
- ✓ Use the caller's name at least twice during the call
- ✓ Match their energy level while staying calm and professional
- ✓ Never rush, even when busy
- ✓ Always offer two specific appointment times (not 'when are you free?')
- ✓ Send confirmation email within 30 minutes of booking
- ✓ Follow up with no-shows with compassion, not judgment