VETERINARY MARKETING · FREE RESOURCE

Front Desk Call Handling Playbook

Scripts, standards & follow-up workflows · Appendix B

START HERE

Our Details

Fill these in once. They're the details your team will use throughout the scripts.

Practice name: _____

Main phone number: _____

Website / online booking: _____

Hours: _____

Exam fees start at: _____

Emergency clinic & phone: _____

PART 1

Speed-to-Lead Standards

A new inquiry answered within five minutes is far more likely to book than one answered an hour later. Check each standard your team is meeting today.

- ☐ **Phone call (incoming):** Answer within 3 rings
- ☐ **Web form submission:** Personal response within 30 minutes
- ☐ **Text message:** Response within 15 minutes
- ☐ **After-hours inquiry:** Auto-acknowledgment immediately, plus personal follow-up the next morning
- ☐ **Missed call from a new client:** Return the call within 30 minutes
- ☐ **No booking after the first call:** Follow up on Day 2 and Day 5
- ☐ **After a first visit:** Personal follow-up call within 24 hours
- ☐ **After a significant procedure:** Personal follow-up call the next morning

PART 2

The Phone Call Framework: Welcome, Listen, Guide, Book

Every new client call follows four steps — urgent sick visits, wellness inquiries, price questions, or new client calls.

Step 1 — Welcome

Answer with warmth and confidence. The first three seconds set the tone for the entire call.

> "Thank you for calling [Practice Name] — this is [Your Name]. How can I help you today?"

Step 2 — Listen

Let the client explain without interrupting. Then reflect it back:

> "I understand — [pet name] has been [brief summary of concern]. I want to make sure we get them the right care."

Step 3 — Guide

Offer one clear path forward — don't overwhelm with options.

> **Sick pet:** "We do have availability for a sick visit — I'd love to get [pet name] in to see one of our doctors. Can I find you a time today or tomorrow?"
>
> **Wellness visit:** "Absolutely — let's get [pet name] set up for a wellness exam. I have a few openings this week. What days work best for you?"
>
> **Not sure yet:** "I'd love to tell you a little about how we work — and then we can find a time that makes sense. Does that sound okay?"

Step 4 — Book

Always end with a booked appointment or a clear next step — never "just give us a call when you're ready."

> "Can I take your name and number so I can follow up with you tomorrow? I want to make sure you're taken care of."

PART 3

Call Scripts by Scenario

New Client — First Call

> "Thank you for calling [Practice Name] — this is [Name]. How can I help you today?"
>
> *[Client explains they're looking for a new vet]*
>
> "Wonderful — we'd love to welcome you. Do you have a specific concern today, or are you looking for a practice for ongoing care?"
>
> *[Guide based on their answer, then:]*
>
> "Let me get you set up as a new client — this will just take a moment. Can I get your name and your pet's name?"

Sick Pet — Urgent Call

Never make an urgent caller feel like a burden. Your calm confidence is the reassurance they need.

> "I'm glad you called. Let me make sure we get [pet name] seen as soon as possible. Can you tell me a little more about what you're noticing?"
>
> *[Listen, then:]*
>
> "We can get you in [today / this morning / this afternoon]. Does [time] work for you?"

Price Question Before Booking

> "That's a great question — our exam fees start at [amount]. Depending on what [pet name] needs, the doctor will walk you through any recommendations and costs before anything is done. There are never any surprises. Would you like to get an appointment scheduled?"

Acknowledge the question. Give a general answer. Redirect to booking. Don't apologize for your prices.

Missed Call — New Client Voicemail (return within 30 minutes)

> "Hi, this is [Name] calling from [Practice Name] — I'm returning your call from earlier today. We'd love to help you and [pet name]. Please give us a call back at [number] — we're open until [time] today. Looking forward to speaking with you."

No callback? Try once more the following morning.

After-Hours Inquiry — Automated Text or Email

> "Thank you for reaching out to [Practice Name]. We've received your message and one of our team members will be in touch with you first thing tomorrow morning. If this is an emergency, please contact [local emergency vet name and number]. We look forward to speaking with you soon."

Managing Two Calls During an Emergency

> **Placing a caller on hold:** "I'm so sorry — I have an urgent situation. Can I place you on a brief hold, or call you right back in two minutes?"
>
> **Returning to the caller:** "Thank you so much for waiting — now, how can I help you?"
>
> **Returning a missed call (within 15 minutes):** "Hi — this is [Name] from [Practice Name]. Sorry I missed you. How can I help?"

Never put an emergency caller on hold for a new inquiry. Let new calls go to voicemail and return them within 15 minutes.

PART 4

Follow-Up Workflows

New Inquiry — Follow-Up Sequence

- **Immediately:** Acknowledge the inquiry — phone, text, or automated message
- **Within 30 minutes:** Personal response from a team member during business hours
- **Day 2 (if no booking):** One follow-up call or text — warm, not pushy
- **Day 5 (if still no booking):** Final follow-up — brief, friendly, no pressure

> **Day 2:** "Hi [Client Name] — this is [Name] from [Practice Name]. I just wanted to follow up and see if you had any questions or if you'd like to get [pet name] scheduled. We're here whenever you're ready."
>
> **Day 5:** "Hi [Client Name] — just a friendly note from [Practice Name]. We'd love to help with [pet name]'s care whenever the time is right. Feel free to reach out anytime."

After Day 5, let it go gracefully.

Post-Visit Follow-Up — New Client (within 24 hours)

> "Hi [Client Name] — this is [Name] from [Practice Name]. I just wanted to check in and see how [pet name] is doing after their visit yesterday. Please don't hesitate to reach out if you have any questions."

Post-Significant-Visit Follow-Up (next morning)

> "Hi [Client Name] — this is [Name] from [Practice Name]. I'm calling to check in on [pet name] after [procedure/visit] yesterday. How are they doing? Is there anything we can help you with?"

PART 5

Role-Play Guide for Team Training

Twenty minutes at a team meeting or weekly huddle, once a month.

- One team member plays the new client — use a real scenario from the past week
- One team member plays the front desk — uses the scripts as a guide, not verbatim
- The rest of the team observes and notes what felt warm, hesitant, or could be smoother
- Rotate roles and repeat

Session date: _____

What to listen for:

- ☐ Did the greeting feel warm and confident?
- ☐ Was the client given a chance to fully explain before being interrupted?
- ☐ Was their concern reflected back before moving to a solution?
- ☐ Was a clear next step offered — not just information?
- ☐ Was an appointment booked, or a follow-up committed to?

Notes — what felt warm, what felt hesitant, what to practice next time:

_____

_____

_____

PART 6

Front Desk Daily Checklist

Start every day with this two-minute check. Print one per week, or save a copy each week.

Week of: _____

	MON	TUE	WED	THU	FRI	SAT
Any after-hours web forms or text inquiries to respond to from last night?	☐	☐	☐	☐	☐	☐
Any missed calls from yesterday with no callback yet?	☐	☐	☐	☐	☐	☐
Any Day 2 or Day 5 follow-ups due today?	☐	☐	☐	☐	☐	☐
Any post-visit follow-up calls to make this morning?	☐	☐	☐	☐	☐	☐
Phone lines tested and working correctly?	☐	☐	☐	☐	☐	☐
Any voicemails from overnight to return?	☐	☐	☐	☐	☐	☐

PART 7

Inquiry & Estimate Templates

Web Form Inquiry — Email Reply (within 30 minutes)

> **Subject:** Thanks for reaching out to [Practice Name]
>
> Hi [Client Name], thank you for reaching out about [pet name]. My name is [Your Name], and I'm on the front desk team here at [Practice Name]. [Answer their question in one or two sentences.]
>
> The easiest next step is to get [pet name] on the schedule. We have openings on [day/time] and [day/time] — would either of those work? You can also call or text us at [phone number], or book online at [website].
>
> We'd love to meet you both. — [Your Name], [Practice Name]

Text Message Inquiry — Reply (within 15 minutes)

> "Hi [Client Name], this is [Your Name] at [Practice Name]. Thanks for reaching out about [pet name]! [Short answer.] Would you like me to find you an appointment time? We have openings [day/time]."

Sending a Treatment Estimate — Cover Message

> **Subject:** [Pet Name]'s treatment plan from [Practice Name]
>
> Hi [Client Name], thank you for bringing [pet name] in today. As promised, I've attached the estimate Dr. [Name] discussed with you for [procedure or treatment].
>
> It includes [what's included — e.g., anesthesia, monitoring, pain medication, and a recheck visit]. It shows a range, because the final cost depends on what the doctor finds — we'll always call you before going above the high end. We also offer [payment options you accept].
>
> Questions? Call me directly at [phone number]. When you're ready, I'll get [pet name] on the schedule. — [Your Name]

Estimate Follow-Up (2 to 3 days later, if not yet scheduled)

> "Hi [Client Name], this is [Your Name] from [Practice Name]. I'm checking in on [pet name] and wanted to see if you had any questions about the treatment plan Dr. [Name] put together. I'm happy to walk through it with you, and I can hold a spot on [day] if that helps."