

Call your own office.

The First Impression Check for concierge & DPC practices

One day. Three calls and one inquiry. Use a phone they won't recognize.

01 Call at 8:05 a.m.

Rings before a person: _____ Greeting, word for word: _____

Person or machine: _____ Did the voice sound glad to hear from you: _____

What happened next: _____

A date, a transfer, a promise, or a message. Write down which.

02 Call at 12:30 p.m.

Rings before a person: _____ Greeting, word for word: _____

Person or machine: _____ Did they ask your name: _____

What happened next: _____

If lunch went to voicemail, write down who was supposed to answer.

03 Call at 4:55 p.m.

Rings before a person: _____ Greeting, word for word: _____

Person or machine: _____ Did anyone say your name back to you: _____

What happened next: _____

Now imagine you were calling because your mother fell. Read your three answers again.

04 Send one inquiry.

At 9 p.m., fill out the form on your own website as a stranger with a reason. Then wait.

Who heard it: _____ When: _____

What they did next: _____

If the answer is "it depends" or "eventually," that door is closed and you didn't know it.

05 Set the standard.

A person answers, every staffed hour, in three rings, and knows what to say to a frightened person.

Every inquiry gets a human reply within the hour during the day, first thing the next morning otherwise.

"Got it. I'll call you at two." counts as a reply.

The desk can fix a small thing without asking: move the appointment, call the pharmacy, say sorry.

The phone is the practice. Everything before it is a promise. The phone is where you keep it.

The one thing to fix this week: _____

Next check, one month out: _____ Who makes the calls: _____