

Listen first.

A meet-and-greet script for concierge & DPC practices

Start seated. Ask one question at a time. Let their answers set the agenda.

01 Start with the story.

“What made you start looking?”

Let them finish. Then ask, “What else?”

Follow up on what they say before introducing the practice.

02 Find out what needs to change.

“What are you hoping will be different?”

“Is there anything about joining that gives you pause?”

Listen for the experience they want and the uncertainty holding them back.

03 Check that you understood.

“What I’m hearing is _____. The part you most want to change is _____.

Have I got that right?”

Use their words. Give them room to correct you.

04 Connect the practice to their situation.

“Let me explain how we would handle that here.”

Describe two or three relevant parts of the practice, with specifics about who does what.

Explain the fee, what it includes and excludes, and how to leave. Make switching easy:

“We move your records. We call your old office. Your prescriptions carry over.”

Be clear about what you cannot promise.

05 Make room for the decision.

“What would help you decide from here?”

“Who else will help you decide?”

Offer that person ten minutes on the phone with you.

Send home a short written summary: the fee, what is included, the first steps and how to leave.

06 Agree on what happens next.

“Would you like us to follow up, or would you prefer to get back in touch?”

If they want a follow-up, agree on who, how and when.

If they are ready to join,

explain the first three steps with names and dates.

If the practice is not a fit, say so plainly.

What matters most, in their words: _____

Next step: _____ Who: _____ When: _____