The Seen to Seated Method

FREE GUIDE U.S. EDITION

Speed is Key

Turn more inquiries into appointments with faster responses: a practical guide for U.S. healthcare practices.

For U.S. healthcare practices.

Inside this guide

1. Set response-time targets
2. Decide who answers what
3. Cover evenings and weekends
4. Send a missed-call text where permitted
5. Follow up with a clear stopping point
6. Make scheduling the easy option
7. Track what happens to every inquiry

✓ Your one-page action checklist

A note from the founder

As a practice owner, your workday often stretches well beyond business hours. Your team needs time off too, so the front desk may be staffed only from 8 a.m. to 6 p.m. on weekdays, just when many prospective patients are busy at work themselves. By the time they have a moment to get in touch, your practice may be closed.

I'm sure your front desk team is amazing. They answer the phone when they can, but they balance answering calls with helping patients in the waiting room. So what happens on a Tuesday at 8 p.m., when a prospective patient is browsing a few practices in the area after putting the kids to bed? What happens on a Sunday morning, when they're watching videos about what's involved and finally feel ready to ask about treatment?

Do you make them wait until the first receptionist is available (and not busy opening up) the next business day? I've been there, and I must admit I've been guilty of getting annoyed about having to wait.

Ten years ago, waiting was normal. Now people expect a quick response. Time is precious, and by the time your team calls them back, they may be at work or may have scheduled an appointment elsewhere.

Do you need to hire an after-hours team offshore? Perhaps you've considered it.

Remember that customer service starts before someone sees you in person. It starts from the moment a prospective patient decides to contact you. Handling inquiries, providing approved basic information, scheduling appointments, and arranging callbacks can put you ahead of practices that leave people waiting.

Take a look at this guide for tips, and in the meantime, if I can help personally, reach out.

Katie Honeychurch
Founder, The Seen to Seated Method
hello@seentoseated.com
calendly.com/katie-honeychurch/demo



Why speed matters

When someone inquires about a private treatment or appointment, they are often contacting more than one practice at the same time. The practice that replies quickly, answers the question clearly, and offers an easy next step is often the one that gets the appointment.

1 Set response-time targets your team can actually hit

"As fast as possible" is not a target. Agree on specific standards for each channel and write them down, so everyone knows the response standards.

- **Phone calls during business hours:** answered live wherever possible, with a clear plan for when every line is busy.
- **Website forms, emails, and social messages:** a personal reply within a set window during business hours, such as within the hour.
- **After-hours inquiries:** a prompt acknowledgment through an allowed channel, followed by a personal response the next business day.
- **High-intent inquiries first:** someone asking about a specific treatment, a course of sessions, or an appointment this week goes to the top of the list.

Pick targets that suit your team and your inquiry volume, then review them monthly. **A realistic target that is met every day beats an ambitious one that is quietly ignored.**

2 Decide who answers what

Slow replies often come from uncertainty rather than workload. A message sits unanswered because nobody is sure whose job it is, or whether they are allowed to give a price.

- **Assign responsibility** for each channel at each time of day, including lunch cover, vacations, and time off.
- **Write approved answers** for common questions: prices or price ranges, payment and financing options, what happens at a first appointment, parking, and access.
- **Agree on what the front desk can answer** and what must go to a clinician, so clinical questions are passed to a licensed clinician rather than answered by guesswork.
- **Keep one shared place** where every new inquiry is logged, so nothing relies on someone's memory.

Keep replies within the rules

Approved answers should be accurate, should not promise results, and should match what your clinicians would say. Check FTC guidance on truthful, supported claims, your state licensing boards' rules, and HIPAA where your practice is a covered entity. If someone asks about a prescription-only treatment, offer a consultation, and have any drug or device promotion reviewed separately against applicable FDA requirements.

Contact rules in brief

- A past inquiry or appointment does not give permanent permission for every channel. Keep records of who agreed to what, when, and for which purpose.
- For promotional texts, make documented written opt-in your standard. A2P 10DLC registration or toll-free verification does not establish consent.
- Commercial email needs accurate sender details, a physical mailing address, and a working unsubscribe method.
- Screen applicable Do Not Call lists, and keep outbound marketing within permitted hours at the recipient's location.
- A 24/7 inbound answering service does not authorize around-the-clock outbound marketing, and AI-generated outbound voices are subject to artificial-voice calling rules.
- Honor clear stop requests promptly. See the FTC CAN-SPAM guide and Telemarketing Sales Rule guide.

3 Cover evenings, weekends, and busy periods

Many people research treatments in the evening or on weekends, when the practice is closed. Others call at the busiest moments of the day, when the front desk is with patients.

- Make sure every after-hours inquiry receives a prompt, friendly acknowledgment through an allowed channel that explains what happens next.
- Offer a way to schedule a consultation or request a callback at any time, so interest is captured while it is fresh.
- Keep urgent and clinical advice routes clear and separate, following your existing after-hours arrangements.

Consider an AI receptionist

Set it up with your approved clinic information to answer common questions and capture details when your team can't pick up. Tell callers they are speaking with an AI assistant, and make sure it does not give clinical advice.

Before you launch, check:

- **Vendor:** if the service will handle protected health information, assess the arrangement and put a business associate agreement in place where required. See the HHS guidance on business associates.
- **Evidence:** don't rely on a "HIPAA compliant" label without evidence of how the vendor handles data.
- **Privacy:** cover the service in your privacy notice, and check how call data and transcripts are stored and who can access them.
- **Call recording:** check federal and state consent rules before recording calls, as some states require every party's consent.

4 Send a missed-call text where permitted

A missed call is often a lost inquiry, because many callers won't leave a voicemail. A short text sent soon after a missed call, replying to the caller's request, keeps the conversation going.

EXAMPLE MESSAGE

> Hi, it's [Colleague name] from [Practice name]. Sorry we missed your call. How can we help? Reply here or schedule a time that suits you: [link]. If you'd like a callback, reply with a good time to reach you and let us know if we should use a different number. Reply STOP to opt out.

A missed call alone does not authorize ongoing marketing texts. Keep the reply tied to the caller's request, and don't automatically enroll callers in a campaign. Make sure the message identifies the practice, and check that your phone system and texting tool handle caller details in line with your privacy notice.

5 Follow up with a clear stopping point

Someone who hasn't replied may still be interested. They might be busy, have missed your message, or need a little more information before scheduling.

- Set a simple follow-up sequence so inquiries aren't forgotten.
- Keep messages short, personal, and helpful, with an easy next step.
- Leave a sensible gap between messages, and use only channels and times you're allowed to use.
- Stop following up when someone schedules, declines, or asks you to stop.

Record why people didn't schedule an appointment, as these reasons help you improve your answers.

6 Make scheduling the easy option

- Offer two or three specific appointment times rather than asking, "What time works for you?"
- Where your calendar allows it, send a link so patients can schedule their own appointments.
- Confirm every appointment in writing with the date, time (including the time zone where relevant), location, what to bring, and any consultation fee.
- Send reminders before the appointment to help reduce no-shows.

7 Track what happens to every inquiry

You can't improve what you don't measure. A simple weekly review is enough to start.

- Number of new inquiries, by channel and by treatment or service.
- How quickly each was answered, against your targets.
- What days and times the calls came in.
- How many inquiries led to appointments, and how many appointments were attended.
- The number of missed calls and how many callers you successfully contacted afterward.
- Reasons people did not schedule an appointment.

Share the results with the team, celebrate improvements, and fix the gaps one at a time. After each change, measure again and compare with your starting point to see whether more inquiries led to scheduled appointments.

Your one-page action checklist

Work through these steps in order. Each one is small on its own; together they make sure no inquiry slips through the cracks.

- [ ] Written response-time targets agreed for phone, web forms, email, and social messages.
- [ ] Responsibility assigned for every channel, including cover for breaks, lunch, vacations, and time off.
- [ ] Approved answers written for prices, payment options, first appointments, parking, and access.
- [ ] Clear rules on what the front desk answers and what goes to a licensed clinician.
- [ ] Approved answers checked against FTC guidance, state board rules, and HIPAA where it applies.
- [ ] One shared log where every new inquiry is recorded.
- [ ] An after-hours acknowledgment through an allowed channel, and a way to schedule or request a callback at any time.
- [ ] AI receptionist and other vendors reviewed, with a business associate agreement in place where required.
- [ ] Missed-call texting reviewed for permission, timing, and opt-outs, then tested.
- [ ] Permission records kept, and stop requests honored promptly.
- [ ] A follow-up sequence that stops when someone schedules, declines, or opts out.
- [ ] Written appointment confirmations and reminders in place.
- [ ] A weekly review of inquiries, response times, appointments, and reasons people didn't schedule.
- [ ] Measure, measure, measure: before and after each change, to see what works.

Tip: print this page, check each box as it is done, and review it with your team every month.

THE SEEN TO SEATED METHOD

Want help putting this in place?

Book a free 30-minute clinic clarity session. We'll talk through where your practice is now, where you want it to be, and the steps worth taking next. You'll leave with three practical next steps, whether we work together or not.

Attract

Marketing that brings the right new patients to your practice.

Respond

24/7 inquiry handling, including an AI receptionist to handle routine inquiries and pass clinical questions to your team.

Convert

Follow-up and scheduling systems that turn interest into appointments.

Book a free 30-minute clinic clarity session

Schedule your free session: calendly.com/katie-honeychurch/demo

Email us: hello@seentoseated.com

The Seen to Seated Method

Helping U.S. healthcare practices turn inquiries into scheduled, attended appointments.

This guide provides general information for U.S. healthcare practices. It does not provide legal, regulatory, or clinical advice. Check applicable federal and state requirements, professional board rules, and platform policies before use, and seek qualified advice when needed.