# Tracking & Converting Leads

## A Front Office Resource

When your dental practice runs a digital ad campaign, every phone call, form submission, and message is important. You're not just answering the phones, you're running the final leg of the relay race, connecting potential patients to care and turning marketing results into real appointments.

At Studio 8E8, we set you up with tools to make this process easier and more transparent. Here's some tips to make the most of them!

## Call Tracking

The first step to organizing your leads is tracking where they're coming from. This gives you clues about how much the patient already knows about your practice, and whether you'd be a good fit. Here's what we set up for you:

- **Forwarding Numbers:** Unique phone numbers replace the number on your website (and local listings) for visitors who arrive from a Google ad. When someone calls this number, it forwards to your office phone line, and your online dashboard will show that it came from an ad.

- **Whisper Messages:** Before a call connects, you'll hear a short message that says how the caller found you. This quick cue helps you shift your mindset (and script) for the right conversation.

**Why it's important:** Besides giving us information about which parts of your strategy are strongest, call tracking also means you don't have to rely on patients self-reporting how they came to your practice.

## Leads Dashboard

The Leads Dashboard is your command center for everything happening behind the scenes. It's where you can review campaign performance, mark your leads as "quotable" or "not quotable," and listen to recorded calls.

- **Quotable leads:** true potential patients who fit your services and location
- **Not Quotable leads:** contacts who don't align (ie. you don't take their insurance, they're from another state, or they're looking for a service you don't offer)

**Why it's important:** Even with the best targeting, some irrelevant contacts will slip through. Noticing a trend, like several "not quotable" calls for a particular service or area, is data we can use to further refine your campaign.

# Script Worksheet

Your confidence can make all the difference when someone calls your office. This worksheet helps you prepare scripts for the most common call types you'll receive during an ad campaign so you can navigate any lead to their next step.

## **STEP 1:** Identify the Call Type

First, just think about the types of calls you receive most often and make a list. For example:

**Call Type**
- ☐ New Patient Inquiry
- ☐ Insurance or Cost Question
- ☐ Treatment-Specific Call (e.g., implants, whitening, Invisalign)
- ☐ Scheduling or Rescheduling
- ☐ Other: ______________________________

## **STEP 2:** Define the Goal of the Call

What do you want this caller to understand, feel, or do by the end of the call? What do you want them to know before they hang up?

**Example:** *"I want them to feel welcome, confident in our care, and ready to schedule an appointment."*

**My goal:** ______________________________________

YOUR STORY IS WORTH IT.

## **STEP 3:** Outline Your Script

Now it's time to get cooking. You can make outlines for different call types and goals, or stick to one and freestyle from there!

**1. Set the tone:** Find a greeting that feels authentically you. It should include your name and the practice name, but put your own spin on it.

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

**2. Ask Discovery Questions:** Take time to understand their needs and gather useful information.

*"How did you hear about us?" "Have you been to our website yet?" "What kind of treatment are you looking for?" "When were you hoping to come in?"*

**3. Information / Response:** Address their questions clearly and confidently.

If it helps, keep a list of answers to FAQs nearby so you can quickly find answers.

**4. Conversion / Next Step:** Guide them toward action.

*"We'd love to help you with that. I can get you scheduled for a consultation. Does [date/time] work for you?"*
*"Would you like me to send you a few details about that treatment before scheduling?"*

**5. Closing:** Always end with warmth and clarity.

*"Thank you for calling! We look forward to seeing you soon."*

YOUR STORY IS WORTH IT.

## **STEP 4:** Review and Refine

Take a moment to reflect on the conversation and how it went.

- ☐ Did I sound natural and friendly?
- ☐ Did I ask the right questions to understand their needs?
- ☐ Did I offer to schedule before ending the call?
- ☐ Did I make them feel heard and cared for?

## **BONUS TIP:** It takes practice!

Following a script may feel unnatural at first, but as you practice it will start to sound like you. Read your script out loud a few times, make tweaks as you go, and remember **the goal is simple**: own each lead and confidently guide them to the next step to get the help they need. You got this!