The 2027 Eaglesoft Front Desk Success Checklist



Is your front office helping your practice grow, or simply keeping up with daily tasks?

Your front office has a direct impact on patient experience, scheduling, treatment acceptance, and practice growth. This checklist is designed for office managers, front desk teams, practice administrators, and practice owners who want to identify opportunities for improvement and focus on what matters most.

Check each statement that is consistently true in your practice.

1. Patient Connection

Do patients feel known—or processed?

- ☐ We create a personal connection before moving into forms, insurance or scheduling.
- ☐ We ask questions that invite conversation rather than simply collect information.
- ☐ We personalize conversations and seek to understand what matters most to each patient.
- ☐ We listen to concerns and expectations, not just the reason for the appointment.
- ☐ Our handoffs demonstrate that our team communicates.
- ☐ We know when technology is appropriate—and when a patient needs a human being.

2. Patient Conversion

Are opportunities becoming appointments and treatment?

- ☐ We know how many new-patient inquiries become appointments.
- ☐ We track unscheduled patients and understand the reasons they do not move forward.
- ☐ Our team can communicate what makes our practice worth choosing.
- ☐ We monitor treatment acceptance and unscheduled treatment opportunities.
- ☐ Patients who leave without scheduling have a defined next step.

3. Patient Communication

Can your team confidently communicate value to patients?

- ☐ We discuss fees without apologizing for them.
- ☐ We explain insurance without allowing it to determine the value of care.
- ☐ We uncover patient concerns before answering with solutions or information.
- ☐ We reinforce the doctor's recommendations consistently.
- ☐ Patients hear consistent language regardless of who assists them.
- ☐ We avoid making assumptions about what patients can afford.

4. Schedule Management

Are you managing the schedule—or is it managing you?

- ☐ We begin each day knowing our priorities, vulnerabilities and opportunities.
- ☐ We schedule toward practice goals rather than simply filling openings.
- ☐ We have a strategy for cancellations and no-shows and have a plan to address them.
- ☐ We identify appropriate same-day treatment opportunities.
- ☐ We actively work on unscheduled treatment.
- ☐ Front and clinical teams communicate when circumstances change.

5. High-Value Activities

Are we spending our time where it matters most?

- ☐ We have identified our front office's high-value activities.
- ☐ We know what deserves priority when the day becomes busy.
- ☐ We prioritize following up on unscheduled treatment and incomplete care.
- ☐ We focus on converting new-patient opportunities.
- ☐ We address schedule vulnerabilities before they become emergencies.
- ☐ We use automation for repetitive tasks so people can focus on conversations and relationships.
- ☐ We ask: "Is what I'm doing right now the best use of my time?"

6. Team Performance

Does your front office understand the business?

- ☐ We know the key numbers we influence, including new-patient conversion and treatment acceptance performance.
- ☐ We understand the impact of an unfilled appointment.
- ☐ We discuss results without blame and look for ways to improve.
- ☐ Every team member can answer: "How does what I do contribute to our patients, our team and the success of the practice?"

_____ Tally your checkmarks

Evaluate Your Results

Give yourself one point for every statement checked.

Your Score	Performance Level	What It Means
33+	High Performing	Your front office is actively driving patient experience, efficiency, and growth.
27-32	Intentional	Strong foundation with opportunities to improve consistency and accountability.
21-26	Functional	Daily tasks are getting done, but opportunities may be slipping through the cracks.
20 or less	Transactional	Your team may be reacting to problems rather than proactively managing them.

What To Do Next

Completing the checklist is the first step. Use your results to identify opportunities, prioritize improvements, and create a plan for the next 90 days.

1. Identify the sections where you checked the fewest boxes.
2. Look for patterns rather than isolated issues.
3. Choose one or two improvement areas to focus on during the next 90 days.
4. Meet with your team to discuss opportunities and create an action plan.
5. Revisit the checklist quarterly to measure progress.

Wondering where to focus first?

Explore 3 front desk workflows that can help reduce bottlenecks, improve consistency, and create a better patient experience.

Read the article



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