CNAC MEMBER SESSION · THURSDAY, NOVEMBER 5

Who's answering your phone?

Member workbook



CALL HOPE DURING THE SESSION

(226) 406-5419

LIVE ONLINE

1:00 PM Eastern · 40 minutes

Presented by Joe Elias

How to use this workbook

Print it or fill it in on screen. Each page matches a part of the session, so keep it open as we go. Nothing here is shared unless you choose to share it.

2	Where are your calls going?	Part 1 · The leak
3	Stump HOPE	Part 2 · Live demo
4	Add up what you pay now	Part 3 · The Office Optimizer
5	Which piece fits?	Part 4 · Buy only what you need
6	Your free audit and next step	Part 5 · Audit and offer

BRING
Your phone

BRING
A question your front desk hears every day

FREE FOR YOU
A mystery shopper call audit

Presented to CNAC members by Full Circle Coaching & Consulting

FULL CIRCLE COACHING AND CONSULTING

CANADIAN NATIONAL ALLIANCE FOR CHIROPRACTIC · ALLIANCE NATIONALE CANADIENNE POUR LA CHIROPRATIQUE

PART 1 · THE LEAK

Where are your calls going?

Most practices don't lose new patients at the front door. They lose them on the phone. Start by finding your own gaps.

1. When does our phone go unanswered?

Tick each time our phone often rings with no one answering.

- ☐ Before we open
- ☐ After we close
- ☐ Front desk is with a patient
- ☐ Holidays or staff away
- ☐ Lunch hour
- ☐ Weekends
- ☐ Peak adjusting hours
- ☐ We're not sure

2. Our best guess

Missed calls per month _____ New patients among them _____

3. What a missed new patient costs us

Use your own numbers. A case average from your practice software is ideal.

_____ missed new-patient calls a month × _____ % who would have booked

× case average $ _____ = $ _____ a month

× 12 months = $ _____ a year walking to the next clinic

4. In the chat

When did our office last miss a new-patient call, and how would we know?

_____

_____

PART 2 · LIVE DEMO

Stump HOPE



Call **(226) 406-5419** when Joe puts it on screen. Ask what new patients ask: hours, first-visit fees, directions, booking a new-patient exam, moving an appointment.

1. My demo calls

WHAT I ASKED	DID HOPE HANDLE IT?	WHAT SURPRISED ME
	Yes · Partly · No	
	Yes · Partly · No	
	Yes · Partly · No	
	Yes · Partly · No	
	Yes · Partly · No	
	Yes · Partly · No	
	Yes · Partly · No	

2. The 10 questions our front desk answers most

Write them the way patients actually ask.

1 _____ 2 _____

3 _____ 4 _____

5 _____ 6 _____

7 _____ 8 _____

9 _____ 10 _____

3. Our “never answer” list

Calls that always go to a person. For example: clinical advice, billing disputes, anything urgent.

_____

_____

_____

_____

PART 3 · THE OFFICE OPTIMIZER

Add up what you pay now



Most offices pay a separate bill for each of these. Write in what your practice spends each month, and leave a line blank if you don't pay for it.

WHAT WE PAY FOR NOW	TOOL WE USE	PER MONTH
Website hosting and upkeep	_____	$ _____
Review requests	_____	$ _____
Texting and reminders	_____	$ _____
Email marketing	_____	$ _____
Online booking	_____	$ _____
Intake forms	_____	$ _____
Website chat	_____	$ _____
Social media scheduler	_____	$ _____
Answering service	_____	$ _____
Other:	_____	$ _____
Our total		**$** _____

HOPE + OFFICE OPTIMIZER

$499 CAD a month

Website hosting and upkeep, reviews, texts, email, forms, booking and social in one system, with HOPE on your phones.

Our total minus $499

= $ _____ a month

Do our tools talk to each other?

Phone, booking, reminders, reviews and practice software.

☐ Yes, one patient record ☐ Partly ☐ No, lots of double entry

Our practice software: ☐ Jane ☐ ChiroTouch ☐ Other

PART 4 · BUY ONLY WHAT YOU NEED

Which piece fits?

Start with the question you're already asking. Pick one piece, and add more only when you need it.



"Are my phones costing me patients?"

☐ Yes ☐ Not sure ☐ No

IF YES

Start with HOPE

Every call answered and booked, 24/7.



"Am I paying for too many tools?"

☐ Yes ☐ Not sure ☐ No

IF YES

Add the Office Optimizer

One system for everything around the visit.



"Does my practice stand out?"

☐ Yes ☐ Not sure ☐ No

IF YES

Add Trailhead

A new brand and website, built in about a week.

CNAC MEMBER PRICING · CAD

HOPE AI	**$299** a month
HOPE + Office Optimizer	**$499** a month
Trailhead add-on	**$2,999** one time

Trailhead is normally $5,000. Your rate stays at the member price while you're a member.

Our ROI, the Full Circle way

New patients in a month × case average ÷ that month's cost × 100

_____ new pts × $ _____ case avg

= $ _____ ÷ $ _____ cost

× 100 = _____ **% ROI**

The piece I'd start with, and why

_____

_____

PART 5 · YOUR FREE AUDIT

Hear what your new patients hear

Every member who registered gets a free mystery shopper call audit. You'll hear exactly what a new patient hears when they call your office.

1
We call your office
Anonymously, the way a new patient would.

2
You get a short report
How the call was handled, start to finish.

3
We review it together
On a short call, with what to fix first.

Before the report: what we hope our team says

Greeting, first-visit questions, how they offer a booking.

_____

_____

SIGN UP BY THURSDAY, NOVEMBER 12

Bonus: a free live training for your front desk

Sign up for HOPE or the Office Optimizer within 7 days of the session, and your CA team gets a free 45-minute live training on both, so it's used from day one.

Ask about it on your walkthrough call.

Book a 30-minute walkthrough

Scan with your phone camera, or **open the booking page**

My next step

Step _____ Who owns it _____

Start date _____ Number we'll track _____

Questions after the session: Joe Elias · joe@fullcirclecoachingandconsulting.com · officeoptimizer.ca