



A prepared consultation, before the first callback.

What the visitor wants to discuss, the visit that fits, the time they asked for, and the priorities they chose, together in one page for the patient coordinator.

RECEIVED	SOURCE	REQUEST COMPLETENESS
Saturday, 8:42 PM · after close	Website inquiry concierge	13 of 13 handoff fields answered

REQUESTED VISIT

Private surgical consultation

Requested for next Thursday at 10:30 AM. The \$150 consultation policy was acknowledged before the request was prepared.

Length	With	Location	State
45 minutes	Plastic surgeon	Main consultation suite	Awaiting staff confirmation

INQUIRY SUMMARY

WANTS TO DISCUSS	Face and neck
MARKED TO DISCUSS	Facial goals and priorities
PREPARATION PRIORITIES	A natural-looking result · recovery and downtime
LEARNING TOPICS SHOWN	Facial goals and priorities · options and tradeoffs
AUTHORITATIVE SYSTEM	Practice scheduler
NEXT HUMAN OWNER	Patient coordinator

SUGGESTED STAFF FOLLOW-UP

- 01 Review the requested consultation, appointment time, and preparation priorities.
- 02 Confirm the appointment in the practice's authoritative scheduler.
- 03 Send the practice's normal confirmation and preparation details.

WHY THIS BRIEF EXISTS

TODAY	A contact form sends a name and a message asking for a call back.
WITH THE CONCIERGE	The coordinator opens the first call at the requested visit and time, with the conversation topics already chosen.