Healthcare VA Learning Hub

Discovery Call Script

Resource Type	Script
Who it is for	Aspiring Medical VAs, Medical Billers, AR follow-up specialists, and healthcare admin learners preparing respectful direct-client outreach.
When to use it	Use before a direct-client discovery call or exploratory clinic conversation.
Last reviewed	July 2026

Purpose

Diagnose the workflow need first, clarify scope, and suggest a small pilot only when appropriate.

How to use this resource

- Read the funnel first: Niche -> Location -> Lead List -> Warm Email -> Follow-Up -> Discovery Call -> Pilot.

- Replace bracketed fields with truthful, specific details.

- Use only public business information. Do not scrape private data or collect patient details.

- Keep outreach respectful, low-volume, and easy to decline.

- Track status and stop contacting anyone who asks not to be contacted.

Discovery Call Flow

Part	Purpose	Example language
Opening	Set respectful agenda	Thank you for taking the time. I would like to understand the workflow first, then see whether a small pilot makes sense.
Workflow questions	Diagnose before pitching	What billing or admin task is slowing the team down right now?
Scope questions	Avoid vague promises	How often does this task happen, who handles it now, and what would success look like after 30 days?
Access and compliance	Protect privacy	I would not request PHI or system access until proper onboarding, agreements, and instructions are in place.
Pilot close	Suggest a low-risk next step	A small pilot focused on one workflow may be safer than a broad commitment.

Discovery Questions

[ ] What billing or admin task is slowing the team down right now?

[ ] Who currently handles AR follow-up, eligibility, prior authorization, or denial tracking?

[ ] Do you have a queue, tracker, or report that needs consistent follow-up?

[ ] What system or process would I need to learn during onboarding?

[ ] What would a successful first 1-2 weeks look like?

[ ] What should not be handled remotely or outside your SOP?

[ ] Who approves next steps, scope, and access?

Pilot Scope Builder

Field	Editable prompt
Goal	[ONE WORKFLOW OUTCOME]
Scope	[ONE TASK ONLY: AR follow-up / verification / auth tracking / denial organization]
Timeline	[1-2 WEEKS]
Deliverables	[STATUS NOTES / TRACKER UPDATES / NEXT-ACTION LIST / SUMMARY REPORT]
Boundaries	No PHI exchange or system access before onboarding, agreements, permissions, and client instructions.
Next step	[FOLLOW-UP CALL / MONTHLY SUPPORT DISCUSSION / END PILOT]

What not to say on the call

[ ] Do not promise revenue, collections, approvals, or payer outcomes.

[ ] Do not give legal, medical, coding, or payer-specific advice.

[ ] Do not ask for patient details before proper onboarding.

[ ] Do not say you can replace certified staff or licensed professionals.

[ ] Do not agree to a vague all-in scope without workflow boundaries.

Common Beginner Mistakes

[ ] Sending the same message to every clinic without personalization.

[ ] Claiming broad expertise instead of one focused healthcare admin offer.

[ ] Using real patient, payer, clinic, account, or login information in practice.

[ ] Pressuring a clinic after they do not reply or ask not to be contacted.

[ ] Discussing pricing, scope, or access before understanding the workflow need.

Safe Practice Reminder

Practice with fictional clinic names, example.com email addresses, and public business information only. Keep outreach respectful, low-volume, and truthful.

No-PHI Practice Reminder

Do not use or enter real patient names, dates of birth, insurance IDs, member IDs, claim numbers, medical record numbers, addresses, phone numbers, diagnoses, treatment details, login details, or protected health information. Use fictional data only when practicing.

Educational Use Only

This resource is for beginner-friendly healthcare admin education only. It is not medical advice, legal advice, coding certification, payer-specific billing authority, a replacement for employer training, or a guarantee of employment. Always verify current requirements with official sources, employer policy, payer rules, client instructions, and updated guidance.

Source/review note

This resource is for educational and business-planning use only. It does not guarantee employment, client acquisition, income, or contract approval. Keep all claims truthful and verify privacy, business, email, and client-contract requirements before use.

Recommended Next Step

After the call, document scope, boundaries, owner, next action, and follow-up date in your tracker.