

# The 2026 playbook: Turn more inquiries into patients

The practices seeing the strongest growth heading into 2026 are the ones that have made their day-to-day work easier, faster, and more consistent. Instead of relying on manual steps, they've created simple systems that keep every call, form, and message from slipping through the cracks.

## What high-performing practices have in common

Across specialties, the teams converting the most inquiries into patients tend to focus on three things:

01

### Clear intake routines

Every inquiry goes to the same place. Everyone knows the next step. Nothing gets lost in an inbox or on a sticky note.

02

### A little help from automation and AI

These teams use tools that automate repetitive tasks, such as following up on missed calls, responding after hours, or extracting key details from conversations.

03

### Tools that work together

Their calls, forms, texts, and messages all live in a shared system. Staff don't have to switch between apps or hunt for information.



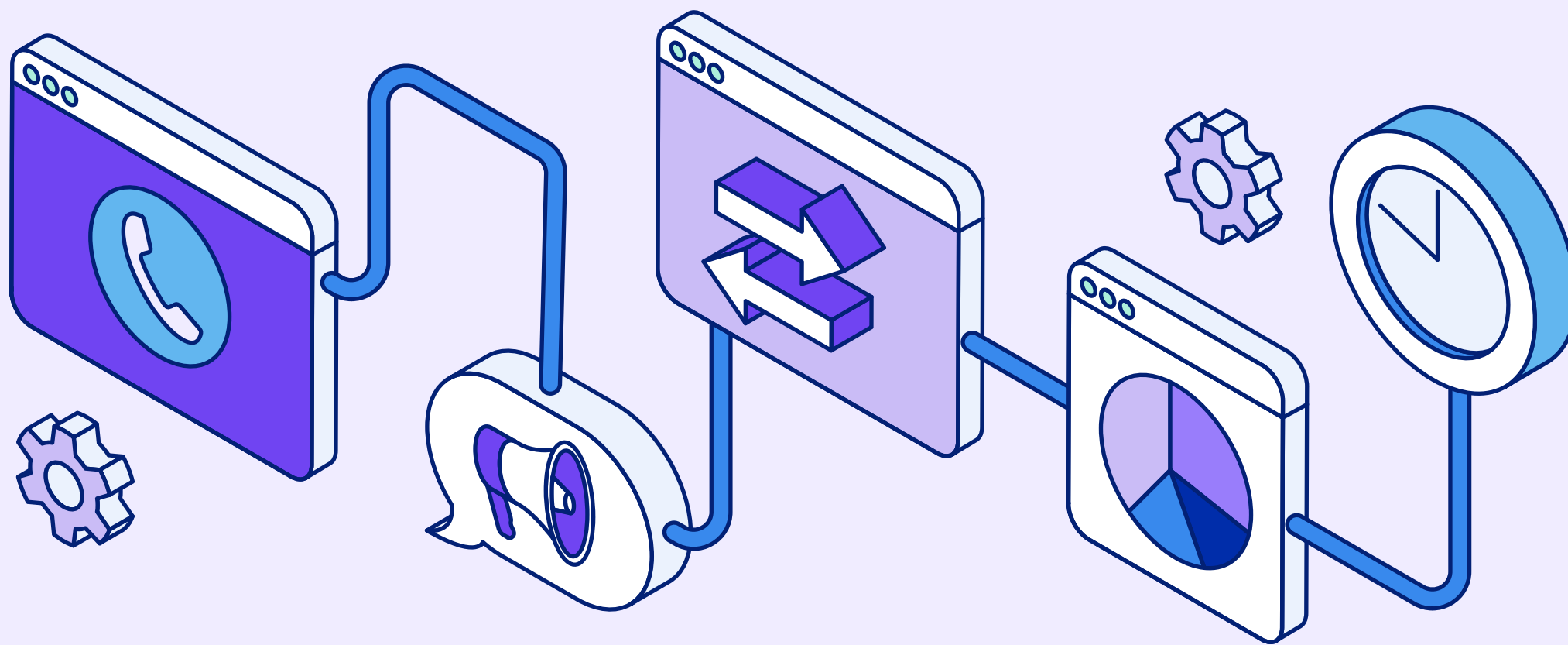
Lead flow has outpaced staffing models. Patient demand has moved online, but most practices still rely on systems built for phone-only workflows, and that's why follow-up and conversions break down.

– **Josh James-Lucy**, CEO, [SM92](#)

## Simple ways to automate more of your intake processes

These are simple changes, but they make a big difference, especially for small teams juggling busy front desks.

- Turn on instant text confirmations
- Route calls to a backup number during peak times
- Use an AI voice assistant to answer calls after hours, lunch breaks, or peak-call times
- Standardize follow-up templates



## What your practice can start doing now

Many of the most effective improvements are quick wins that save time immediately.

- ✓ **Send all calls, forms, and messages to a single dashboard.**  
This reduces missed opportunities and keeps everything visible.
- ✓ **Use automatic replies for form fills and after-hours calls.**  
Even a quick “We received your message” can keep potential patients from looking elsewhere.
- ✓ **Use AI-generated call notes and insights.**  
This saves staff time and helps identify training opportunities without extra work.
- ✓ **Let AI help you sort incoming leads.**  
When everything looks urgent, nothing feels manageable. AI can help highlight what needs attention first.
- ✓ **Make follow-up steps consistent across the team.**  
When everyone follows the same process, fewer leads fall through the cracks.

# Connect your marketing and operations to drive more growth

As patient expectations rise, the practices that thrive will be those that treat marketing and operations as a single, connected experience. Every call, every form, every message becomes a chance to build trust — and with the right systems in place, more of those moments turn into new patients.

## Want to strengthen your intake and tracking processes?

Discover how CallRail enables healthcare practices to capture more leads, automate follow-up, and identify which marketing efforts drive appointments.

[Try CallRail for free →](#)

### Methodology and Demographics

*This report is based on a survey of 100 healthcare professionals conducted in October 2025. Respondents represented a mix of seniority and functional roles, including Executive Leadership (43%), Marketing (general) (25%), Operations (22%), SEO/Organic (5%), Paid Social (3%), Strategy (1%), and Social Media Management (1%). Agencies of varying sizes were included, with 4% employing 1-19 people, 19% employing 20-99 people, 37% employing 100-249 people, and 40% employing 250-499 people. The survey was conducted at a 95% confidence level with a +/-5% margin of error.*

