FREE 5-STEP GUIDE

The Mental Health Practice Inquiry Guide

CAPTURE INQUIRIES.

FOLLOW UP WITH CLARITY.



A better first step for prospective patients

Running a mental health practice means balancing patient care and business operations. Learn five simple ways to make contact easier, collect essential details, and organize follow-up.

CLEARER CONTACT • SIMPLER FORMS • BETTER FOLLOW-UP

STEP 01

Make it easy to reach you

A clear contact path helps patients take the next step.



WHY THIS MATTERS

When someone visits your practice website, they should quickly understand your services and how to contact your team. Unclear buttons and crowded pages can make the first step confusing.

A SMALL CHANGE WITH A BIG PURPOSE

Instead of a vague “Learn More” button, use a direct call to action such as “Request a Mental Health Appointment.”

Request a Mental Health Appointment

YOUR QUICK CHECKLIST

- ✓ Explain services in everyday language.
- ✓ Make the inquiry button easy to find.
- ✓ Check the page on a mobile phone.
- ✓ Explain what happens after a form is submitted.

STEP 02

Keep the first form simple

Collect essentials, not a complete clinical history.



WHY THIS MATTERS

An inquiry form should be easy to complete. Ask for only the administrative details needed to respond, and collect sensitive clinical information later through an appropriate secure intake process.

SAMPLE INQUIRY FIELDS

Full name	Basic identification
Email or phone	Preferred contact information
Service interest	Therapy, psychiatry, or medication management
Appointment type	Virtual or in person
Contact preference	Email or phone

BEFORE YOU PUBLISH

- ✓ Label required fields clearly.
- ✓ Include a privacy notice; avoid clinical details.

STEPS 03 + 04

Follow up with care

A simple acknowledgment creates a clearer experience.



WHY THIS MATTERS

Once a visitor submits an inquiry, they should know it was received. Show a confirmation message and send an acknowledgment email while your team prepares to respond.

SAMPLE ACKNOWLEDGMENT

“Thank you for contacting our practice. We received your inquiry. Our team will review your request and contact you about the next steps.”

ORGANIZE THE NEXT STEP

Track inquiries in an appropriate secure system. Use statuses such as New inquiry, Awaiting response, Contacted, Appointment requested, and Closed. Assign someone to review requests regularly.

FOLLOW-UP CHECKLIST

- ✓ Display a clear confirmation page.
- ✓ Send a brief acknowledgment email.
- ✓ Assign responsibility for reviewing inquiries.

STEP 05

Connect the full journey

Bring the improvements together in one process.



WHY THIS MATTERS

A lead funnel connects your service page, inquiry form, confirmation, acknowledgment email, and administrative follow-up into one organized experience.

THE PATIENT INQUIRY JOURNEY

01
Website visitor

02
Short inquiry form

03
Confirmation + acknowledgment

04
Administrative follow-up

FINAL FIVE-POINT CHECK

- ✓ Clear service information and contact button
- ✓ Short, privacy-conscious inquiry form
- ✓ Confirmation page and acknowledgment email
- ✓ Secure administrative follow-up
- ✓ Regular review of the inquiry journey

WANT HELP CONNECTING THE PIECES?

Reply to the delivery email about a done-for-you lead funnel.