

7 Trust Signal Audit for Your Call Center

A 30-minute operational worksheet to identify trust gaps, improve patient interaction, and strengthen call center performance.

🕒 30 minutes • 👤 For patient access and call center leaders • 🖨️ Print or complete on screen

This worksheet will help your team audit the seven trust signals that shape patient confidence before, during, and after a call. For each section, assess what's currently in place, identify gaps, assign ownership, and document next steps.

How to Use This Worksheet

- 1 Review each trust signal honestly
- 2 Check off what you currently have
- 3 Score each signal
- 4 Identify gaps
- 5 Assign owners
- 6 Set action deadlines

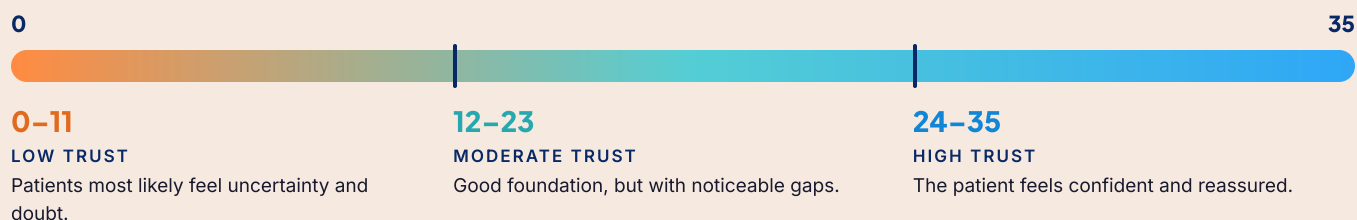
The 7 Signals at a Glance

Your roadmap for the pages ahead. One signal per section, each scored out of 5.

- 1 **Privacy and Security**
Visible HIPAA and data reassurance
- 2 **Real Staff Visibility**
Real people, names, and faces
- 3 **Wait Time Transparency**
Honest queue expectations
- 4 **Clear Access to Clinical Care**
Fast routes to clinical staff
- 5 **Clear Recording Message**
Plain-language recording notices
- 6 **Seamless Patient Information Access**
Context at every handoff
- 7 **Visible Reviews**
Public proof of patient trust

Scoring

0-1 missing • 2-3 inconsistent or weak • 4-5 strong and consistent • Total possible = 35



1 Privacy and Security

AUDIT QUESTION

Can your patients clearly see how their information is protected before they make contact?

- ☐ Is your HIPAA messaging visible on the contact page?
- ☐ Is your privacy reassurance visible on the scheduling page?
- ☐ Are third-party security certifications displayed?
- ☐ Is the data handling process explained simply?
- ☐ Does the mobile version also show HIPAA and privacy reassurance?

SCORE

WHAT IS MISSING

ACTION PLAN

___ / 5

2 Real Staff Visibility

AUDIT QUESTION

Do patients feel like they are reaching out to real people and not a machine?

- ☐ Are real staff photos used instead of stock images?
- ☐ Are your team members introduced by name and role?
- ☐ Does your brand communication feel personal rather than robotic?
- ☐ Do your staff bios feel warm and relatable?
- ☐ Are the call center team leaders visible on websites and support pages?

SCORE

WHAT IS MISSING

ACTION PLAN

___ / 5

3 Wait Time Transparency

AUDIT QUESTION

Do your patients know what to expect when they are waiting?

- ☐ Are average call wait times publicly communicated?
- ☐ Are real-time wait updates provided where possible?
- ☐ Are downtimes and service interruptions communicated clearly?
- ☐ Are queue expectations managed with realistic timing?
- ☐ Are messages concerning delays respectful and reassuring?

SCORE

WHAT IS MISSING

ACTION PLAN

___ / 5

4 Clear Access to Clinical Care

AUDIT QUESTION

Can your patients quickly reach the right level of care without unnecessary routing?

- ☐ Does your phone menu clearly differentiate urgent vs non-urgent needs?
- ☐ Do your patients know which option connects them to clinical staff?
- ☐ Are escalation pathways for urgent cases fast and obvious?
- ☐ Does the website clearly explain who your patients can reach and why?
- ☐ Are your average transfer times to clinical staff less than 2 minutes?

SCORE

WHAT IS MISSING

ACTION PLAN

___ / 5

5 Clear Recording Message

AUDIT QUESTION

Does your patient understand your call recording message?

- ☐ Does your recording explanation use simple, plain language?
- ☐ Do you clearly explain why calls may be recorded?
- ☐ Are your patients reassured that their information remains protected?
- ☐ Is the tone of voice warm and human, and not monotonous?
- ☐ Are your automated messages easy to hear and understand?

SCORE

WHAT IS MISSING

ACTION PLAN

___ / 5

6 Seamless Patient Information Access

AUDIT QUESTION

Does your call system make it easy for your staff to answer with knowledge and make your patients feel seen?

- ☐ Do your call center tools directly connect with patient records?
- ☐ Can your staff quickly view relevant patient information?
- ☐ Does each step have access to prior steps so patients do not need to repeat the reason for their call?
- ☐ Do call transfers include handoff notes and context?
- ☐ Does your staff prioritize calls based on urgency and care type?

SCORE

WHAT IS MISSING

ACTION PLAN

___ / 5

7 Visible Reviews

AUDIT QUESTION

Can potential patients easily see proof that others trust your care?

- | | |
|---|---|
| ☐ Are your patients' reviews visible on the pages they commonly visit? | ☐ Are these testimonials credible? |
| ☐ Are positive experiences included in the scheduling touchpoint? | ☐ Are online reviews monitored and responded to? |
| ☐ Is feedback communicated to patients after care is received? | |

SCORE

WHAT IS MISSING

ACTION PLAN

___ / 5

Final Scoreboard

Add your seven scores together, then find your band below to see where your call center stands.

Final Score ___ / 35

0-11

LOW TRUST

Patients most likely feel uncertainty and doubt.

12-23

MODERATE TRUST

Good foundation, but with noticeable gaps.

24-35

HIGH TRUST

The patient feels confident and reassured.

Notes

Key takeaways, owners, and deadlines from this audit.