

Booking forward to see you!

Forward booking is 'best practice' for your practice.
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Forward Booking Appointments:

How to Fill Your Appointment Schedule

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VETERINARY
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Executive Summary:

Forward Booking Appointments

1. Forward booking simply means booking the pet's next appointment before he/she leaves the practice after the current visit. This should be done for both medical progress exams (rechecks) and for preventive healthcare (i.e., annual or six-month) exams.
2. Your entire practice team has to agree on the philosophy of forward booking for ALL pets. No client should leave your practice without his or her pet's next appointment booked.
3. Practice the types of conversations your team may have with pet owners about forward booking. The words you use with pet owners are important. You may consider role-play exercises for team practice. For sample scripts and video resources, see pages 7-8.
4. Each member of your practice team must understand his or her roles and responsibilities in promoting forward booking. For checklists of individual practice team responsibilities, see pages 8-10.
5. Establish a reminder system that works for your practice and is most convenient for your clients. Don't forget to consider generational differences; some clients may want a text, email, or phone reminder while others prefer a traditional reminder card.



WHY IS FORWARD BOOKING A “BEST PRACTICE” FOR YOUR PRACTICE?

The bottom line is that when we see pets and their owners at the appropriate times, our patients receive the quality of healthcare they need and deserve.

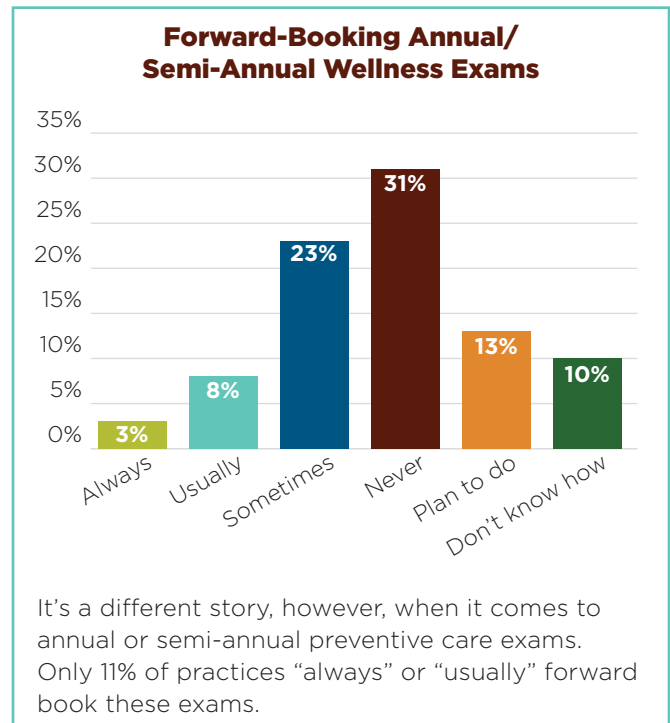
What Is Forward Booking and Why Is This a Good Thing?

Forward booking simply means booking the pet's next appointment before he/she leaves the practice after the current visit.

This should be done for ALL patients regardless of the reason they are there—future appointments should be made for both medical progress exams (rechecks) and for preventive healthcare (i.e. annual or six-month) exams.

If you've visited a dentist anytime in the last ten years, you know what this is. It's almost impossible to leave your dentist's office without booking that next appointment and there isn't really any good reason why this shouldn't be done in veterinary medicine as well.

Many practice teams are used to forward booking appointments for rechecks or medical progress exams. According to the October, 2014 VHMA Insider Insights Report, 76% of practices "always" or "usually" forward book recheck or medical progress exams.



Forward booking has advantages for everyone—the client is more likely to bring Fluffy in on a timely basis if the appointment is already on their calendar. The pet will stay healthier if they're seen regularly. The practice gets the satisfaction of providing pets with better care as well as enjoying the financial return.

The first step in increasing forward booking in your practice is to shift your thinking away from believing clients won't accept this practice. A few pet owners won't like the change and won't make the appointment early.

But for the majority of clients, it shifts the responsibility for scheduling the visit away from the client. This means it's much more likely the pet will be seen on a timely basis.

Don't ask for a client's permission to book their pet's next appointment; remember that no pet owner should leave the office without knowing when they are coming in next.

Most people love making their dental appointment in advance because it's one less thing they have to remember to do and they will feel the same about their pet's appointment.

Research done for the Partners for Healthy Pets suggests that many pet owners have every intention of getting regular checkups for their pets, but with the many day-to-day demands of a typical household, calling to schedule an appointment just doesn't get done. With an appointment already scheduled, pet owners are more likely to either keep the appointment or reschedule for a different time.

Words matter with forward booking—see pages 7 and 8 for examples of client conversations including how to deal with pushback.

Implementing forward booking in your practice is going to be most successful if it's a team effort. Everyone has a role in making this work for both pet owners and the practice. See pages 8–10 for a summary of each team member's role and responsibilities in a typical practice.

Every practice is a little different but this is a starting point for deciding who will do what in your own practice.

Invest in appointment cards to send home with the clients so they can put the appointment on their calendar if they aren't doing it electronically right then.

Set up reminders several weeks and then several days in advance of the next year's appointment so the client can change or cancel if needed.



Don't forget to consider generational differences and use the type of reminder the client prefers. Some clients may want a text, email, or phone reminder while others prefer a traditional reminder card.



Don't worry about some clients forgetting their appointment; that is what the reminders are for. Some clients will have to call and change the date, but that's ok too—it still means their pet will likely be seen much sooner than if the practice had to wait for the client to reach out to book the appointment.

Even if this doesn't work with every client every time, more pets will be seen more promptly than if the practice wasn't using forward booking.

The biggest reward for veterinary teams from seeing clients more frequently and more promptly is the satisfaction of taking better care of pets. There is no question, however, that forward booking can help the practice financially as well. Financially successful practices are those that can continue to invest in better pet care and their teams.

The 2013 AAHA State of the Industry report estimated that moving the percent of forward booked appointments from 5% to 10% could generate about \$40,000 in additional revenue for a typical practice (about 3% more in revenue growth) and a total of \$350 million dollars in additional preventive care revenue for the industry as a whole. In most practices, 50% to 70% of that extra revenue will drop to the bottom line as additional profits, which can be reinvested in the practice or shared with staff.

Undoubtedly, the time has come in our profession for this crucial initiative.

In summary, when we forward book for every pet and subsequently see those pets and their owners at the appropriate times, our patients receive the quality of healthcare they need and deserve!

Words That Work With Clients

Forward booking preventive care exams works best when the exam room team and the front desk team work in tandem with each other. Below are short scripts to provide examples of what different members of the practice team can say to clients to make forward booking exams easy and comfortable for clients:

DOCTOR OR TECHNICIAN/ VETERINARY ASSISTANT:

- The last person to talk to the client in the exam room (it may be the doctor or it may be the technician or veterinary assistant) should say something to foreshadow the forward booking appointment:

“Max is all up to date on his vaccinations and parasite protection and, if everything goes well, we won’t need to see him again until this time next year. Chelsea will set that appointment up for you before you leave.”



RECEPTIONIST/CLIENT RELATIONS SPECIALIST:

- The front desk staff/client service specialist should acknowledge to the client that most of us don’t know our exact schedule a year in advance, but can suggest that if Wednesday afternoons (or whenever today’s appointment occurred) is generally a good time, next year’s appointment can simply be made for one year from now on a Wednesday afternoon. Therefore, the client service representative may say to a client:

“We’ve booked Fluffy’s next appointment for one year from now on a Wednesday afternoon. I know many of us have no idea what we are doing in a year but as the date gets closer, you’ll receive plenty of reminders from us. If Fluffy’s appointment time doesn’t work for you, we can always schedule it on a different day.”

- If the client doesn't think he/she wants the appointment, be prepared to offer more information such as this:

“Most of our clients find having the appointment on their calendar helps them plan more easily for their pets' care. And, don't worry, we will get back in touch when it gets closer to the date. You can always change it then if you need a different date.”

NOTE: To watch a short training video demonstrating a front desk conversation about forward booking a wellness exam, go to the Partners for Healthy Pets website: www.partnersforhealthypets.org/communications.aspx.

Practice Team Roles and Responsibilities

Many practices are used to forward booking recheck or medical progress exams. Forward booking preventive care appointments, however, is a new application of this technique to help clients care for their pets better. Everyone has a role to play in its success.

PRACTICE MANAGER:

- Meet with the doctors to determine the forward booking interval at which they wish to schedule pets' next preventive healthcare exam dependent upon patient life stages, e.g., adult preventive healthcare exams, puppy and kitten visits, senior wellness exams, and parasite management and testing.
- Check to see if new computer codes are needed for any new types of appointments or reminders and put them into the system.
- Setup software reminders confirming the forward booked appointments. Include language that asks the client to call if they need to change day or time. (These reminders should follow the same schedule as regular reminders.)
- Gather baseline data on how many pets are in compliance with the practice's preventive care exam protocols. Compare the baseline with the results you get when you start forward booking. The baseline information can also be used to set goals for each kind of forward booking appointment you do.



- Set up a staff meeting and ask the doctors to discuss the importance of seeing patients regularly and how forward booking helps. Share your vision of how forward booking appointments will work. Describe who will do what and the tools and training team members can expect. Ask for feedback and tweak your plan, if needed, based on team members' feedback and ideas.
- Set up training to cover the new protocols and procedures, new computer codes, and client communication about forward booking appointments.
- Track, measure, and report back to all team members progress toward the goal(s) at regular intervals to maintain focus on forward booking appointments.
- Brainstorm and share ideas to address challenges as well as celebrate successes along the way.
- Reward your team when major milestones toward goals are reached.

DOCTORS:

- At your doctors' meeting, determine the forward booking interval you wish to have your patients' next preventive healthcare exams scheduled dependent upon life stages, such as adult preventive healthcare exams, vaccinations, puppy and kitten visits, senior wellness exams, and parasite management and testing.
- Share the above decisions with the practice manager so he/she can write them up to share with the practice team.
- Talk about the protocols and why they are important to the pets you see at the kick-off staff/team meeting.
- Foreshadow the forward booking appointment when you wrap up the exam, e.g., "Chelsea will set up Max's next appointment for you before you leave."

TECHNICIANS AND VETERINARY ASSISTANTS:

- Work with the doctors to support the new protocols for exams and other wellness services.
- If you are entering charges, use the new codes for wellness visits/services.
- Foreshadow the forward booking appointment in client conversations.

**CUSTOMER SERVICE REPRESENTATIVES/RECEPTIONISTS/
FRONT DESK STAFF:**

- Note which clients are candidates for forward booking preventive health care exams and flag for the team when the client arrives.
- When the client is checking out, make sure to tell them that you are setting up the pet's next visit. (Ideally, the client service specialist can inquire about, and then note in the system, the client's preferred method of being reminded: text, email, phone, or regular mail.)
- Be prepared to give the client an explanation of why you are doing this and tell them they will receive a reminder before the appointment and can always change it, once it gets closer to the date.*
- Remind client (text, email, card, phone call) several weeks in advance of the forward booked appointment.
- Use the new codes in the system to ensure reminders are generated as promised.
- Call or text clients a day or so ahead of time to confirm their pet's appointments.



***Training Resource:** Watch a video on how to have an effective client conversation about forward booking a wellness appointment from Partners for Healthy Pets at www.partnersforhealthypets.org.



Led by the American Veterinary Medical Association and the American Animal Hospital Association, *Partners for Healthy Pets* is an unprecedented collaborative alliance of over 120 veterinary associations, colleges of veterinary medicine and animal health companies all committed to a vision of improved overall health for pets. *Partners for Healthy Pets* provides tools and resources that help communicate the value and benefit of preventive care, enhance the veterinary-client relationship and improve the overall quality of preventive healthcare provided for patients.

To learn more, or to access free resources for veterinary teams go to:

www.partnersforhealthypets.org