How to efficiently manage scheduling calls

By Wendy S. Myers, CVJ, President, Communication Solutions for Veterinarians

An analysis of 1,000 calls to physicians and hospitals to schedule appointments revealed the average time to complete a scheduling call was 8 minutes.¹ This call time exceeds the cross-industry best practice of 3.7 minutes. A third of call duration was unproductive time, with callers waiting on hold or transferring between employees. Without improvements in the scheduling process, physicians could expect the patient experience to deteriorate, driving people to seek treatment elsewhere.

Could pet owners experience the same service when calling your veterinary clinic to book appointments? Whether you get a tsunami of calls or have a chatty client on the phone, you must lead the pace of calls. Otherwise, you’ll spend 12 minutes scheduling an exam that should take 3 to 5 minutes.

To demonstrate how to manage scheduling calls, let’s look at a phone conversation to book a pet’s preventive checkup. Follow the tips to learn how you would lead the call for efficiency and provide five-star service.

**PET OWNER:** “I need to schedule an appointment for my dog.”

**TIP:** Determine how quickly the patient needs to be seen. Strive to book preventive checkups within one week. If the pet is sick, schedule an exam today. If the caller doesn’t indicate the reason for the appointment, ask, “What will we be seeing <pet name> for?”

**RECEPTIONIST:** “I’d be happy to schedule your dog’s checkup. May I ask your name and your dog’s name so I can access his medical record?”

**TIP:** Ask for caller and pet names at the beginning of the conversation so you can locate the patient’s record in your practice-management software. For example, my last name is Myers, and your hospital likely has multiple clients with my same last name. My dog’s name is Max, which is one of the most popular dog names. Locate the right record to see which services and products are due. Previewing services will set expectations for the client and let you choose the correct appointment length. Use caller and pet names about three times during the scheduling process to build rapport and show that you value the client’s loyalty.

**PET OWNER:** “My name is Michelle Johnson, and my dog’s name is Scout.”

**RECEPTIONIST:** “What will we be seeing your dog for?”

**PET OWNER:** “I received his reminder for a preventive checkup.”

**RECEPTIONIST:** “I’d be happy to schedule your dog’s checkup. May I ask your name and your dog’s name so I can access his medical record?”

**TIP:** Ask for caller and pet names at the beginning of the conversation so you can locate the patient’s record in your practice-management software. For example, my last name is Myers, and your hospital likely has multiple clients with my same last name. My dog’s name is Max, which is one of the most popular dog names. Locate the right record to see which services and products are due. Previewing services will set expectations for the client and let you choose the correct appointment length. Use caller and pet names about three times during the scheduling process to build rapport and show that you value the client’s loyalty.

**PET OWNER:** “My name is Michelle Johnson, and my dog’s name is Scout.”

**RECEPTIONIST:** “Thanks, Michelle. I see that Scout is due for his exam, vaccines, diagnostic testing and refills on preventatives. Does Scout have any health or behavior concerns that you want to discuss with the doctor?”

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TIP: To personalize the phone experience, the receptionist immediately repeated the caller’s and dog’s names. She gave a brief overview of services and products due to set expectations. If a patient is due for 10 services, don’t overwhelm the caller with too much information. Summarize four categories: Exam, vaccines, diagnostic testing and preventatives. The veterinarian and technician can explain the 10 services during the exam.

When scheduling checkups, ask callers, “Does <pet name> have any health or behavior concerns that you want to discuss with the doctor?” Her answer may require a longer appointment time. When the caller explains that her 10-year-old dog seems stiff and doesn’t enjoy walks, schedule a 30-minute exam for an arthritis workup instead of a 20-minute preventive checkup.

 PET OWNER: “No, he seems to be doing great.”

 RECESSIONIST: “That’s good news. Let’s schedule Scout’s exam this week. Is there a doctor you prefer?”

 TIP: When a client requests a specific doctor, offer the next two available exams with that veterinarian. If the caller doesn’t have a preference, offer two exam choices with the doctor who is available first or with a new associate veterinarian who is building client relationships. To communicate your confidence in the new doctor, tell the caller, “Let’s schedule you with Dr. <Name>, who recently joined our team. He has a special interest in senior care and would love to see <pet name>.”

 PET OWNER: “Yes, I’d like to see Dr. <Name>.”

 RECESSIONIST: “Perfect. Let’s look at <his/her> schedule. Which day of the week do you prefer?”

 TIP: Identify the desired day of the week. If the caller requests Thursday, search available exams on the next two Thursdays.

 PET OWNER: “Thursdays work best.”

 RECESSIONIST: “Would you prefer morning, afternoon or evening on Thursday?”

 TIP: Identify a window rather than a specific exam time. If the caller requests 2 p.m., reply with “Let’s see what we have available in the afternoon.”

 PET OWNER: “Afternoon.”

 RECESSIONIST: “We could see Scout at 3 or 4 p.m. on Thursday. Which time works for you?”

 TIP: Use the two-yes-options technique to guide the caller to exam times that will work well for your schedule’s flow. Aim for the scheduling pattern of preventive care/sick/preventive care. Whenever possible, sandwich a sick-patient exam between two checkups. Preventive care exams are more predictable and likely to stay on time. If you have the scheduling pattern of sick/sick/, appointments may run late the remainder of the day.

 PET OWNER: “3 p.m.”

 RECESSIONIST: “Dr. <Name> will see Scout next Thursday at 3 p.m. for a preventive checkup. We will confirm your appointment two days before and remind you to bring a teaspoon-sized stool sample for Scout’s intestinal parasite screen. Thanks for calling, and have a great day!”

 TIP: Restate the time, date and doctor at the end of the call. Increase compliance for intestinal parasite testing by reminding clients to bring stool samples twice: 1) During the scheduling call and 2) During the appointment confirmation call. Let the client know when you’ll confirm the appointment as a courtesy reminder. Say thank you to show your appreciation.

For more training, order our webinar on “Take Control of Scheduling Calls,” which includes unlimited playback of the recorded webinar for your entire team, a handout, one hour of CE credit, a test and a CE certificate. Order at www.csvets.com/cart/webinars/take-control-of-scheduling-calls/.

Quick-Reference Steps to Efficiently Scheduling Exams

1. Determine the reason for the exam.
2. Ask caller and pet names at the beginning of the call to locate the patient record in your software.
3. Give a brief overview of services and products due to set expectations for the visit.
4. Ask whether the pet has health or behavior concerns.
5. Choose the right appointment length.
6. Ask about doctor preference.
7. Identify the day of the week.
8. Identify the time of day (morning, afternoon, evening).
9. Use the two-yes-options technique to guide the caller to times that will work well for schedule flow.
10. Aim for the scheduling pattern of preventive care/sick/preventive care.
11. Summarize appointment details at the end of the call (time, date, doctor and stool sample request).
12. Let the client know when you will confirm the appointment as a courtesy reminder.

Reference:

About the Author Wendy S. Myers owns Communication Solutions for Veterinarians in Castle Pines, Colo. She helps teams improve client service, communication skills and compliance through consulting, seminars and monthly CE credit webinars. Wendy is a certified veterinary journalist and author of 101 Communication Skills for Veterinary Teams. Her “Callers Into New Clients Course” teaches receptionists how to turn price shoppers into new clients. You can reach her at wmyers@csvets.com or www.csvets.com.