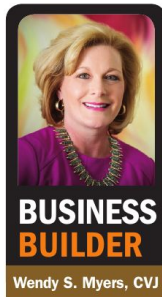


# Four ways to use forward booking

**F**orward booking, or scheduling all patients' future appointments before they leave the practice after their current visit, can provide timely patient care and dramatically improve your bottom line. However, industry research shows only five percent of veterinarians use forward booking compared to 80 percent of dentists. Increasing forward-booked exams by 10 percent would add \$40,000 in annual revenue for a typical veterinary hospital. Here are a few tips on how to forward book four appointment types.



## 1) Medical progress exams

Veterinarians excel in this category. A Veterinary Hospital Managers Association Insider Insights Report found 76 percent of teams schedule progress exams.<sup>2</sup> Tell clients when their pets need to be seen next, avoiding the yes-or-no choice of "Do you want to schedule your next appointment?" Follow the guidelines of "same day, same time, same doctor."

Seeing the same veterinarian builds client confidence the medical problem will be resolved and provides exam efficiency. If a different doctor sees the patient for follow-up, he may spend twice the amount of time reviewing the medical record to learn the previous veterinarian's diagnosis and treatment. Tell the client, "Dr. Smith needs to see your dog in two weeks for a medical progress exam for Duke's ear infection. Does this same time, 9 a.m., on Oct. 25, fit your schedule?"

Select from three approaches to schedule care now:

**Choice 1:** If you have computers in exam rooms, book follow-up care now. Don't risk having the client walk through the "mind-erase hallway" on the way to the front desk to check out. Because the client is focused on leaving, she forgets to schedule. The receptionist may not know that follow-up care is necessary unless she reads the diagnosis in the medical record.

**Choice 2:** Enter an alert into your software or use a travel sheet. This notifies receptionists to schedule medical progress exams before checking out clients for today's services.

**Choice 3:** Do a verbal handoff. The doctor or technician walks the client to the checkout counter and tells the receptionist, "We need to see Duke again in two weeks for a progress exam for an ear infection. Could you please schedule that with Dr. Smith?"

Avoid the term "recheck," which some clients may perceive as free and optional. The phrase "medical progress exam" clearly communicates you're following up on a previously diagnosed condition. Update this term in your practice management software.

## 2) Procedures

Give clients information to decide on treatment on the day of diagnosis. After the veterinarian explains the diagnosis and the clinic's anesthetic protocols, answer the client's questions. Have a technician present a treatment plan listing medical services and fees. The technician would tell the client, "Now that Dr. Smith has answered your questions, he asked me to go through the

treatment plan with you, so you understand the specific services and fees. I will show you photos of a pet's dental procedure that illustrates each of the steps. I can share information about our payment plans through <third-party financing>. Then you can decide how you want us to proceed." After reviewing the treatment plan, ask for a commitment: "Shall we schedule your pet's procedure?" Lead the client to book now with the two-yes-options technique: "We can perform the dental procedure on Monday or Wednesday. Which do you prefer?"

Busy practices may have full surgical and dental schedules for two or more weeks. If clients don't schedule elective procedures on the day of diagnosis, you may have limited availability, which causes them to seek faster care elsewhere. Focus on what you can do, not what you can't. Say, "Dr. Smith's next available surgery days are Oct. 23 and 24. Which do you prefer?"

## 3) Disease-management exams

Create categories of exams to distinguish reminders and fees. Use pediatric, adult, and senior preventive exam codes for routine checkups. When a pet is diagnosed with a chronic health condition, change the preventive exam code to a disease-management exam. Forward booking will let the veterinarian provide optimal disease management. Clients also will appreciate the veterinarian has spread out the cost of care.

Set the reminder interval based on the frequency of follow-up care. Let's say you diagnose a dog with arthritis and prescribe an NSAID and a therapeutic diet. You want to see the patient every six months for exams and drug monitoring tests.

After explaining the diagnosis and answering the client's questions, tell her, "Because Daisy was diagnosed with arthritis today and will begin long-term medication, I need to see her every six months to successfully manage her arthritis and check blood work in case we need to

adjust medication dosages. Six months from today would be March 16. I could see Daisy at 9 a.m. or 3 p.m. Which do you prefer?" Explain the "why" behind the change in frequency of exams and use benefit statements.

## 4) Preventive checkups

Six out of 10 pet owners will forward book their pets' checkups.<sup>1</sup> Use a comparison that clients already understand. Say, "Just as your dentist has you schedule your next appointment at checkout, we do the same to proactively manage your pet's health. Dr. Smith could see your pet at 10 a.m. on Wednesday, March 14, or 3 p.m. on Friday, March 16. Which do you prefer?" The first choice is the same day of the week and time as today's appointment. The second choice is a different day of the week and time of day (morning versus afternoon).

When a procrastinator won't book, be persistent and use benefit statements. Say, "I understand you don't know your schedule 12 months from today. Let's book your pet's next checkup for this same day and time next year. We will confirm two weeks before the exam, so if you need to change the appointment it will be easy. By scheduling today, you will get your first choice of doctor, day, and time. Your appointment reminder for 10 a.m., Wednesday, March 14 will print on today's receipt."

Color code your schedule to identify which appointments were forward booked. Confirm these exams two weeks in advance in case clients need to reschedule. Use text and email confirmation for efficiency. If clients have not responded to electronic notices, call them four days before forward-booked exams to confirm.

You will need to have doctors' schedules in your software for 12 months in the future. Don't worry if work schedules change due to veterinarians' conference attendance or vacations. Doctors will often request time off one or more months ahead of time, especially when buying plane tickets and registering for conferences in advance. Because you'll confirm forward-booked exams two weeks ahead, you can easily move appointments. Call the client and say, "Dr. Smith asked me to call you to reschedule Daisy's disease-management exam on March 16 because he will be out of the office. Can the doctor see Daisy at the same time, 10 a.m., on Wednesday, March 21, which is just one week later?"

Forward booking doesn't fall on the shoulders of receptionists alone. Doctors, technicians, and receptionists must support one another's efforts to secure follow-up care. Clients need to hear a consistent message that you're working together as a team to proactively manage their pets' health. ●

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