JumpStart 100

**Forward booking: Keep this Good Habit Going or Get it Started Now**

*Please reference: By Terra Shastri, Director of Business Development & Strategic Initiatives with the Ontario Veterinary Medical Association*

Results from the latest Economic Survey show that only 41 per cent of veterinary practices are forward booking clients for their pet’s next appointment. Even for these veterinary teams, it’s possible this good habit has fallen to the wayside, given how busy most clinics have been over the last several months. If this is the case, it’s important to get back into the routine of forward booking.

For the remaining hospital teams who have yet to commit to forward booking, what are you waiting for? It’s one of the easiest ways to take control of your schedule, and it saves you the time of chasing down clients, convincing them they need an appointment, and then figuring out a date and time that fits both your schedules. With forward booking, once the appointment is scheduled, the only thing left to do is confirm the appointment closer to the date. In addition to being a more efficient process, forward booking also sends the message to clients about how important appointments and exams are for their pet.

It’s also better client service. Most people are busy, and forward booking makes it easier for them. You’re taking the onus off the client to call the clinic to schedule an appointment once they receive a reminder from you.

Consider the fact that dental practices have implemented forward booking simply because it works.

Like most habits, it takes time to get used to it. The first step is figuring out where in the client visit process they will be booked for their next appointment.

**When?**

You can forward book the next appointment any time the client is at the front desk, such as after an appointment or when the client comes in to purchase food or medication. Once you have a forward booking system in place, try to get the client into the habit of booking next year’s wellness exam before they leave the practice following this year’s wellness exam.

When the client arrives at reception to pay, schedule the next appointment prior to reviewing the invoice. Clients are used to this process, and it’s important to do it before settling their balance.

**How?**

Initiate the conversation about scheduling the next wellness exam appointment before settling the client’s bill by saying:

“*Dr. Chris would like to see Fluffy again the same time next year, so I have you scheduled to come in on Oct. 10 at 2 p.m. We’ll send you a confirmation notice two weeks ahead of your appointment. We can take care of any scheduling issues you might have at that time*.”

Or use this for forward booking a follow up visit:

*“Dr. Lisa would like to see Fluffy six weeks from now as a follow up. Do either Oct. 27 at 5 p.m. or Oct. 28 at 6 p.m. work for you?”*

*Client picks a date.*

*“We’ll call you a day or two ahead of time to confirm.”*

Determine a reasonable confirmation time frame for each appointment. If a client has forward booked a year out, confirm two weeks prior to the appointment. When a client books four to six weeks ahead of time, a confirmation call could be made two to three days in advance of the appointment.

**What if?**

There may be some staff resistance to forward booking because it may be something they would never do as a client, or because of variances in veterinarians’ schedules or fear that clients may say “no.” After tracking practices that forward book, an average of 89 per cent of clients forward book their next appointment.

If a decision has been made to forward book appointments for all clients, introduce it to staff and give them the tools (e.g. scripts) to help implement it. It’s also helpful to appoint a team lead to show the rest of the staff how it’s done. When staff members insist that they would never book a year in advance, encourage them to at least try it (using the script), so they can see how easy it really is.

While doctor schedules may not be set in stone, there are usually certain days of the week that they’re available. Follow this pattern when forward booking appointments, and if an appointment time has to be rescheduled the following year because the client’s preferred veterinarian is working a different schedule, this is still easy to do. The client is still committed to the appointment, and it’s merely a matter of rescheduling.

There will be some clients who ask why or say no to forward booking. When a client asks why they need to forward book, equip staff with the following script:

“*We’ve realized that all of our clients are busy, so it can be challenging to get their pets in for their next exam. By booking now, you know well in advance when Fluffy needs to come in, it saves you the extra step of calling to book an appointment and it keeps us all on track with keeping Fluffy happy and healthy*.”

Why not make forward booking appointments the norm in your practice? It’s easy to do, it promotes better pet health, it fills the appointment book and it is something you can start today.

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