



Forward Booking

How Forward Booking
Leads to Better Patient Care



An American Animal Hospital Association-American Veterinary Medical Association White Paper



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FORWARD BOOKING can be a powerful tool for adding value to your practice in the form of:

- Optimum care for your patients
- Improved client convenience
- An opportunity for client education and dialogue
- An effective vehicle for staff cohesion and morale

Forward booking simply means scheduling the next appointments for all patients before they leave the practice for their current visit. Forward booking applies to all types of exams and healthcare visits, including medical progress exams (“rechecks”) and preventive healthcare exams.

Unfortunately, *forward booking is greatly underutilized in veterinary medicine*, including companion animal practice. This is a marked difference from human medical and dental practice. For example, American Animal Hospital Association (AAHA) survey data indicates that up to 80% of dental patients forward book versus an overall rate of 5% in veterinary practice (Table 1).¹ Other experts estimate that only 11% of veterinary practices “always” or “usually” forward book for regular wellness exams (only 3% always forward

book wellness exams).² Although the estimated percentage of veterinary practices that “always” or “usually” forward book is higher (76%) for medical progress or recheck exams typically associated with acute care, the overall forward booking rate remains disappointingly low in companion animal practice.² This disparity becomes more striking in view of the fact that forward booking is routinely employed by a wide range of service industries and professions. We routinely make advance appointments for personal and pet grooming, dental exams, car care, lawn care and landscaping, and home maintenance. In other words, consumers are accustomed to making advance appointments, and they generally accept forward booking as a convenience and to minimize the risk of service gaps.

The chief value of forward booking in veterinary practice is to provide the best possible patient care in the form of the appropriate service at the optimum return-visit interval. Conversely, absence of forward booking results in healthcare delivery at irregular intervals, missed clinic visits, greater possibility of a subpar treatment response, and lapses in preventive care. These shortfalls create

the potential for increased pet healthcare costs and inconvenience for the client, and they have an adverse impact on a pet's wellbeing, longevity, and quality of life (QOL). Not coincidentally, irregular healthcare visits also reduce opportunities for interaction between the practice team and its pet-owner clients, which diminishes the practice's relationship with its clientele.

The veterinary medical profession has now recognized the vital role of forward booking in delivering optimum pet healthcare. During the past five years, AAHA has identified forward booking as a key factor driving preventive healthcare in the form of regular healthcare visits for canine and feline patients.¹ This, in turn, creates opportunities for client engagement and results in acceptance of other pet healthcare services, such as dental care, dietary management, pet behavioral assessments,

heartworm screening and prevention, vaccinations, and senior pet healthcare screenings. Veterinary practices have more opportunities to update clients on emerging topics in pet healthcare, anticipate life-stage or breed-associated conditions, and identify changes and risk factors in a pet's household environment.

This report (1) explains how you can implement forward booking in your practice using a freely available, professionally developed suite of online tools developed by Partners for Healthy Pets (PHP), and (2) describes how these resources have made a positive contribution to veterinary practices, their patients, and their clients. Implementing forward booking in your practice can be doubly rewarding, both in terms of enhancing the delivery of healthcare services to patients and strengthening a team-oriented culture within the healthcare team.

TABLE 1. The statistics of forward booking

Parameter	Statistical outcome	Reference
Estimated client compliance with forward booking in U.S. dental practices	60%	1
Estimated client compliance with forward booking in U.S. dental practices when combined with effective client communications	80%	1
Avg. % of clients who always forward book in U.S. veterinary practices	5%	1
% of U.S. veterinary practices that "always" or "usually" forward book 6- or 12-month wellness exams	11%	2
% of U.S. veterinary practices that "always" or "usually" forward book for medical progress exams ("rechecks")	76%	2

Implementing forward booking in your practice

One individual—usually the practice owner, a senior veterinarian, or practice manager—should be responsible for implementing forward booking and being its principal advocate within the practice. Introducing forward booking should be done in a staff meeting setting where the entire healthcare team is assembled. This is because every member of the practice has a role in forward booking and should have full awareness of the forward booking purpose, goals, and procedures. Each practice member should be prepared to explain to a client the reasons for forward booking and its benefits for the pet owner and patient. For practices that are new to forward booking or that apply it on an inconsistent basis, implementing advance appointments for every patient after every visit may require a change in group behavior, practice culture, or preconceptions about client interaction (see next section, “Aligning the practice culture with forward booking objectives”). This is another reason for full staff participation in the implementation process.

By using the suite of online tools available from PHP (see box, *Forward Booking Tools from Partners for Healthy Pets*), implementing forward booking as a standard operating procedure becomes a straightforward, step-by-step, and relatively simple process. The staff member who assumes responsibility for introducing and monitoring the forward booking initiative has several excellent resources at his or her disposal to prepare for and execute the launch.

In a 17-minute coaching webinar in slide-lecture format (*How to Implement Forward Booking in Your Practice*), noted practice management consultant



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and veterinarian Karen Felsted provides a compelling rationale for forward booking and explains how to introduce the concept to the clinic staff. Dr. Felsted notes that forward booking before the client leaves the clinic has proven superior to electronic or mailed reminders for ensuring that a timely return visit will be made. “With forward booking, the initiative for scheduling a return visit rests with the practice instead of the pet owner,” she says. “Experience has shown that this greatly reduces the chances of a delayed or missed healthcare visit. And the more frequently a patient is seen, the more likely it will maintain a high level of health.”

Forward Booking Appointments: How to Fill Your Appointment Schedule is a downloadable complement to the coaching webinar. This 12-page “how-to” guide, authored by Dr. Felsted and Karyn Gavzer, provides a roadmap for implementing forward booking in your practice. This includes a description

of the responsibilities each member of the practice assumes in a forward booking program (“everyone has a role”) and examples of dialog for explaining forward booking to pet owners (“words that work”).



The Key to Forward Booking Appointments is a one-page overview designed as a handout to introduce forward booking to the healthcare team and gain their commitment to this initiative. By using the six short *communication-tips*

videos, staff training sessions become interactive exercises in developing the skills and situational awareness needed to reflexively explain forward booking to clients. For example, video #6 provides examples of effective ways for both the veterinarian and the receptionist to talk about forward booking with clients and how to address client objections. Also available is a *one-page discussion guide* on how to use the videos in a staff meeting setting. When the videos are complemented by role-playing during training sessions, every staff member can gain the confidence to explain forward booking to clients in a genuine and effective manner.

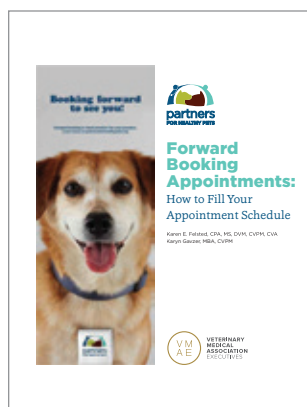
Visual reminders are an excellent way to promote forward booking and keep it top-of-mind among staff members and to create awareness among clients. *Posters and buttons* from PHP are available for in-clinic use. The posters are downloadable from the PHP website, and the buttons can be ordered free of charge in increments of 5, up to a total of 25 complimentary dog- and cat-paw buttons (see Figure 1).

Aligning the practice culture with forward booking objectives

As Dr. Karen Felsted and Karyn Gavzer note in their *Forward Booking Appointments* instruction guide, “Your entire practice team has to agree on the philosophy of forward booking for ALL pets. Each member of your practice team must understand his or her role and responsibilities in promoting forward booking.”² This alignment of the practice culture with the goals and methods of forward booking should not be left to chance. Implementing forward booking may require changes in individual staff members’ preconceptions about the reasons for making advance appointments on an every-patient, every-visit basis. Importantly, each healthcare team member should be an advocate for forward booking and be willing to initiate a proposal to forward book an appointment and explain the reasons for doing so.

The best way to align the practice team’s behavior with forward booking goals and methods is to (1) ensure each team member understands the reasons for forward booking, (2) clearly define each individual’s responsibility for advance booking, and (3) address common objections and barriers to forward booking. The *Forward Booking Appointments* instruction guide has a section on recommended roles various practice team members

have for implementing forward booking. Suggested forward booking responsibilities are defined for the practice manager, veterinarian, technicians and veterinary assistants, and client service personnel.



Forward Booking Tools from Partners for Healthy Pets

Partners for Healthy Pets has developed a suite of forward booking tools available at no cost to veterinary practices. These professionally designed resources have been extensively field tested and proven effective in clinical settings. *All of the forward booking tools are free, easy to access, and easy to use.* Each of the following forward booking tools is available online at partnersforhealthypets.org:

TO DECLARE YOUR PRACTICE A FORWARD BOOKING PRACTICE AND GAIN TEAM COMMITMENT:

- ***The Key to Forward Booking Appointments***—A concise 1-page overview to the forward booking implementation process and a roadmap to using the other PHP forward booking tools.

TO TRAIN YOUR TEAM AND DEVELOP A FORWARD BOOKING PROTOCOL:

- ***How to Implement Forward Booking in Your Practice***—A 17-minute webinar and coaching sessions with award-winning practice consultant Karen Felsted, DVM, CPA, MS, CVPM, CVA.
- ***Forward Booking Appointments: How to Fill Your Appointments Schedule***—A 12-page “how-to” guide containing everything you need to know to implement forward booking in your practice, authored by veterinary practice consultants Dr. Karen Felsted and Karyn Gavzer.
- ***Forward booking communication tips training videos***—Six 2-minute videos showing a step-wise process for implementing forward booking.
- ***A video discussion guide*** on how to use the forward booking videos in a staff meeting setting.

TO KEEP FORWARD BOOKING TOP-OF-MIND:

- ***Forward booking buttons and posters***—In-clinic display items to keep forward booking top-of-mind for staff and clients.

FIGURE 1—Forward booking reminder buttons can be ordered free of charge (25 buttons or less) from the Partners for Healthy Pets website.





A key aspect of a unified staff approach to forward booking is that the exam room team and front desk team work in tandem to appropriately book advance appointments for all exam situations. For example, the last person to talk to the client in the exam room should suggest the need for booking the next appointment (e.g., “Linda will set up Max’s next appointment before you leave.”). The front desk staff should follow up by always proposing a date for the patient’s next visit.

Overcoming objections and barriers to forward booking, including those that may be held by practice team members themselves, is discussed in a later section of this report.

Once expectations have been established for each staff member’s responsibility for forward booking, role playing can be a powerful way of reinforcing individual behavior that supports advance booking on an every-patient, every-visit basis. *Role play is*

the single most effective tool for using a common language by the practice team to implement forward booking. The short scripts in the Partners for Health Pets videos and *Forward Booking Appointments* instruction guide provide excellent models for role play dialog with clients about forward booking.

When each practice team member understands the rationale for forward booking, namely that it supports the welfare of the patient and the convenience of the client, its implementation becomes relatively easy and a natural extension of a value-based practice.

*We have learned that practice teams that successfully forward book do so because they collectively believe this approach delivers the best outcomes for patient care. **Forward booking is not a money plan, it’s a patient care plan.***

—RALPH JOHNSON, CEO, VMAE

Forward booking works!

There is little data on the costs of declining to forward book in companion animal practice. However, practice management experts generally agree that forward booking increases the number of patient visits for preventive healthcare. As noted earlier in this report, regular preventive healthcare visits drive engagement between the client and the practice staff, which typically results in future visits for additional services. The 2013 AAHA State of the Veterinary Profession report revealed that revenue from visits for additional services can exceed that for preventive care by two- or three-fold,¹ and that increasing forward booking appointments from 5% to 10% could generate 3% revenue growth for a typical practice.²

In 2017, PHP and the Veterinary Medical Association Executives (VMAE) conducted a joint campaign to encourage forward booking in U.S. companion animal practices. The campaign included a testimonial contest (*Forward Booking WORKS!*) to solicit forward booking success stories in written or video format from participating practices. Cash awards were given to 16 winning practice entries as judged

by the VMAE Task Force on Practice Management. A total of 45 state veterinary medical associations actively promoted the campaign to their respective members. Testimonials highlighted the following positive outcomes in practices that instituted forward booking protocols.

A high degree of client acceptance of forward booking

We're in our third year of pre-booking appointments, and our clients love it. They're just too busy to call ahead themselves. So, how has it helped our practice? In 2016 we had 86% appointment compliance—199 booked appointments and 171 kept appointments. In 2017 we had 79% compliance for 1,273 booked appointments.

—SOUTHCARE ANIMAL MEDICAL CENTER, SPOKANE, WA

Our clinic has maintained over 40% forward booking acceptance two years in a row.

—CITY CAT DOCTOR, CHICAGO, IL

Forward booking: It's about the patient's care, not economics

"Advancing patient care should be the prime motivation for forward booking," says Ralph Johnson, CEO of the VMAE. "We have learned that practice teams that successfully forward book do so because they collectively believe this approach delivers the best outcomes for patient care. Practice teams won't embrace forward booking if they perceive that it's for economic reasons, because most staff members don't like asking clients for money. *Forward booking is not a money plan, it's a patient care plan.*"

Practice teams that have not implemented forward booking are often concerned that clients will object to advance scheduling, notes Mr. Johnson. Practices are generally pleased to discover that clients like and appreciate forward booking when they realize it is for their benefit and that of their pets, and that they always have the option to reschedule the appointment.

When we started [forward booking] about a year ago, I was worried that clients would feel like we were imposing something on them, but that hasn't been the case. Most clients are very appreciative that they can set up the next appointment before they leave the office. If you haven't started to forward book, I encourage you to give it a try. It's a lot easier than you might think.

—DEVONSHIRE VETERINARY CLINIC, ANDERSON, IN

An increased rate of return visits

One year into the [forward booking] initiative, our recheck appointments increased by 50%, and a year later rechecks had increased by nearly 100%.

—CARDIAC CARE FOR PETS, LEESBURG, VA

We have noticed an increase in patient visits since we implemented forward booking, and we encourage any practice not already doing this to give it a try.

—FAYETTEVILLE ANIMAL CLINIC, FAYETTEVILLE, TN

Improved treatment compliance

Forward booking helps our healthcare team deliver the best care possible by ensuring that puppies and kittens get their boosters and exams on time. It helps ensure success in treating all healthcare issues.

—FAYETTEVILLE ANIMAL CLINIC, FAYETTEVILLE, TN

We tell clients that it's a lot easier to reschedule an existing appointment than to have to remember to call to make the appointment.

—ANIMAL FAMILY VETERINARY CARE CENTER, DAVENPORT, IA

Reduction in treatment failures and better monitoring of chronic conditions

A benefit of forward booking is managing chronic conditions. We see so many cases of skin infections, allergies, and chronic ears. The days when we just sent owners home with medication, ear drops, and shampoos and said, 'Come back if it doesn't get better' were frustrating both for us and the pet owner. Setting up the client's next appointment at checkout ensures timely rechecks and success in managing these cases, rather than flare-ups when the client has run out of medication.

—FAYETTEVILLE ANIMAL CLINIC, FAYETTEVILLE, TN

Our practice believes forward booking preventive healthcare visits is critical for the health and wellbeing of our patients. [It] allows us to notice any changes in health or behavior early enough to treat successfully.

—ANIMAL FAMILY VETERINARY CARE CENTER, DAVENPORT, IA

Confidence-building effect and improved client communication among the practice team due to purpose-driven client interaction

The entire staff regularly communicates the message to our clients that forward booking wellness visits is 'just what we do.' It's just like pre-booking their next doctor or dentist appointment.

—ANIMAL FAMILY VETERINARY CARE CENTER, DAVENPORT, IA

[Forward booking] gives us another opportunity for personal, one-on-one communication with our clients.

—ANIMAL HOSPITAL OF MEBANE, MEBANE, NC

With the buy-in from every member of our staff, future booking is considered ‘best medicine’ at our clinic.

—CITY CAT DOCTOR, CHICAGO, IL

Once we got staff buy-in that they were acting in the best interest of our patients, they started to feel comfortable and confident talking about forward booking.

—ALPINE ANIMAL HOSPITAL, CARBONDALE, CO

Reinforcement of a high standard of care for the practice

Our medical team’s goal is to provide the best care for our patients. Forward booking ensures that our doctors can quickly and efficiently monitor the progress of their patients. Could you imagine not seeing your doctor for over a year?

—CLEVELAND ROAD ANIMAL HOSPITAL, WOOSTER, OH

Another factor that strongly supports scheduling forward is to provide our clients packaged healthcare, a motivating and cost-effective way to meet all the healthcare needs of their pets.

—ALPINE ANIMAL HOSPITAL, CARBONDALE, CO

Measuring success

Practices that use forward booking can measure its impact by means of several metrics maintained on a monthly, quarterly, or annual basis. These outcomes include the percentage of clients who agree to forward book, the percentage of forward booked appointments that were kept, and the number and percentage of patients presented for preventive healthcare and medical progress exams that pre-booked versus those who self-scheduled.

Once an advance booking program has been established in your practice, positive trends in these patient-appointment parameters will reflect its value as measured by client acceptance.

Sharing these outcomes with the healthcare team will reinforce a culture of a value-based practice that measures results, invites feedback, and then uses self-assessment for purposes of continuous improvement.

Common objections and barriers to forward booking

Why do so many veterinary practices decline to forward book? Why is forward booking the norm in human medical and dental practice but not in companion animal medicine? Here are suggested responses to four commonplace reasons why some veterinary practices do not routinely offer to forward book.

“I’m not comfortable up-selling or appearing ‘pushy’ to the client.”

This is perhaps the most common reason veterinary practices do not forward book. The intent of forward booking is to show concern for the needs of the pet (optimum healthcare) and the client (convenience). A proposal to forward book an appointment is an opportunity for the staff member to assure the client that the practice’s first goal is the welfare of the patient by means of early diagnosis of health problems, increasing the likelihood of treatment success, and ensuring that preventive healthcare protocols are met. Once staff members equate forward booking with the best interests of their patients and clients, they generally feel non-apologetic and confident in pre-booking an appointment. Stated another way, *a forward booking proposal does not mean you are asking the*



The essence of a forward booking proposal is to convey the idea that the purpose of an assured future appointment is to provide the best care possible for the pet by scheduling an exam at the optimum time interval for the patient.

client to spend more money for services; it means you are advocating for the health and wellbeing of the pet and the convenience of its owner.

See the “Words that work” section below for phraseology that you can use to confidently propose an advance appointment.

“We’re doing fine without a forward booking program.”

As those in the human dental profession can attest, forward booking is one of the most effective strategies for maintaining regular preventive healthcare visits and keeping patients from drifting away. Thus, forward booking is the initial step in a healthcare plan that is grounded in life-stage oriented preventive care complemented by timely and appropriate management of acute and chronic conditions. *In the final analysis, the most successful*

practices are those that deliver the best care for their patients. With its emphasis on regular healthcare visits, forward booking is a proven approach to maintaining a patient’s QOL and wellbeing, not to mention one that helps minimize “no-shows.”

“I don’t know what my schedule is like down the road.”

There is a sensible and readily accepted response to this common reason for not making an advance appointment. Reception personnel should explain that the client will receive a reminder well in advance of the exam date, providing ample opportunity to change the appointment. Forward booking is a two-step process: booking the appointment followed by a reminder sent via the client’s preferred communication method (email, postal card, phone call, or text message). A traditional reminder card offered when the client leaves the clinic works, too.

“Clients won’t accept forward booking.”

Not every client will agree to forward book an appointment. However, experience in clinical practice has shown *that most people actually prefer making an advance appointment*. They consider it a time-saving convenience that ensures they can be seen at their preferred exam date and time, and it eliminates the possibility of overlooking a medical exam altogether. In other words, an appointment scheduled in advance is one less thing the client needs to worry about. As an added inducement, some practices offer a small discount for booking a preventive care appointment in advance.

Words that work: The language of forward booking

By using appropriate phraseology, practice team members can propose a forward booked appointment in a way that the client will accept with understanding and appreciation. *The essence of a forward booking proposal is to convey the idea that the purpose of an assured future appointment is to provide the best care possible for the pet by scheduling an exam at the optimum time interval for the patient.* The choice of words may differ depending on who is making the proposal to forward book, i.e., clinical or front office staff. In any case, the forward booking proposal should be made non-apologetically and with a brief explanation of the reason for the next appointment.

IN THE EXAM ROOM

During or at the end of an exam, a clinical staff member should make a comment that foreshadows booking an advance appointment at the reception desk. The forward booking proposal can be

expressed in terms of the results of the exam that has just been completed. Some examples:

You’re doing a good job of making sure Buddy is up to date on his vaccinations and is getting the nutrition and exercise he needs. We also had good results from his blood work, so we won’t need to see him for a wellness visit until next year. When you leave, the receptionist will schedule his next appointment at a time that’s convenient for you so we can make sure Buddy stays in top health.

Because we’re starting Bonnie on a new daily medication, I would like to schedule an exam and diagnostic blood work in a month to ensure her liver function is normal and that there are no side effects to treatment.

AT THE RECEPTION DESK

Working in tandem with the clinical staff, reception personnel should schedule the patient’s next appointment at an appropriate interval for the next medical progress or preventive healthcare exam visit.

We’ve scheduled Molly for her next appointment six months from now. We’ll send you a reminder well in advance of the appointment so you can reschedule it if you need to.

The best way to monitor Sparky’s health status is with a regular preventive care exam, so let’s go ahead and schedule your next visit for a year from now.

In case a client needs more encouragement to rebook, a comment like the following can be helpful:

We encourage all our clients to book their next appointment in advance because it's the best way for us to ensure that our patients are seen before any serious problems develop. It lets us provide the best care possible.

We forward book because most of our clients prefer to do so as a matter of convenience and so we can be sure that our patients don't miss a check-up that could reveal a health problem. We value all of our patients and feel this is what's best for them.

WHEN A VETERINARIAN OR TECHNICIAN ESCORTS THE CLIENT TO RECEPTION AREA

In some practices or exam situations, the attending veterinarian or technician will escort the client from the exam room to the reception desk. In such cases, the clinical staff member can authoritatively reinforce the need for a forward booked exam, giving the receptionist instructions such as the following:

We need to see Ginger for a progress exam in three months. Please schedule an appointment that would be convenient for Mrs. Johnson.

Tips for implementing a forward booking protocol

TIP #1 Include the reason for the next exam visit on the patient's discharge form to enable reception personnel to further explain or reinforce the need for forward booking the appointment.

TIP #2 When making a future appointment, suggest using the same time and day of the week as the previous exam with the assumption that it is a convenient choice for the client.

TIP #3 Track the number of pre-booked appointments on a monthly basis as a way of measuring forward booking progress, and use these benchmarks to celebrate and reward performance.

TIP #4 To ensure compliance with forward booked appointments, send reminders to the client a month in advance of the appointment (appointment confirmations help eliminate no-shows and allow the client to reschedule an appointment if necessary).

TIP #5 Have the attending veterinarian or technician accompany the client to the reception desk to assist in scheduling the next exam and offer an explanation, if needed, for the future appointment.

TIP #6 When clients leave the clinic, offer them appointment reminder cards with their next appointment date and time indicated, or indicate the next appointment date on the exam invoice.

TIP #7 To better communicate value for professional services, use the terminology "medical progress exam" instead of "recheck."

TIP #8 When a client leaves the clinic, reschedule the next visit first, then accept payment for the current visit ("schedule first, pay last").

TIP #9 Schedule acute-care exams between preventive care exams, a pattern that increases the likelihood of staying on schedule.

TIP #10 When developing the practice's forward booking protocol, describe each staff member's role and responsibilities for forward booking.

TIP #11 When scheduling an exam visit, always mention to the client that a reminder will be sent and that the exam can be rescheduled if necessary.

TIP #12 Use a forward booking proposal as an opportunity for client education, e.g., explaining that advance appointments have proven superior to electronic or written reminders in ensuring that a pet's healthcare needs will be met.

Final thoughts

Veterinarians give various reasons for declining to forward book. These include:

- The practice team does not want to appear to be pushing unwanted services onto their clients.
- The practice team does not want to encounter client resistance to rebooking and is therefore reluctant to change its scheduling practices.
- The practice team does not know how to best implement an effective forward booking protocol.

In fact, service professions have found that most customers or clients are receptive to forward booking when it is positioned as a convenience to them and a way of avoiding service lapses that could lead to greater costs and inconvenience down the road. While this is also true in companion animal practice, the more compelling reason for forward booking is that it helps ensure delivery of the best possible care for the patient, i.e., an appropriate or needed service at the optimum exam interval. In this sense, forward booking is a component of a value-added practice that seeks to faithfully

comply with the veterinarian's oath. The *Forward Booking WORKS!* testimonial contest was a real-world demonstration that veterinary practices that utilize forward booking as a component of optimum healthcare are rewarded with increased patient visits, satisfied clients, and a high standard of patient care.

It is human nature to resist change, including altering the way that appointments have traditionally been scheduled in a veterinary practice. The Partners for Healthy Pets forward booking tools provide practice leadership with excellent resources for implementing forward booking in a step-by-step process with a high probability of success. When an underlying culture of teamwork and continuous improvement exists and the practice team understands and accepts the reasons for forward booking, implementing a forward booking initiative can be a rewarding experience for the entire staff. When this occurs, the practice team accepts change as the agent of a learning organization that meets the needs and exceeds the expectations of its patients and clients.

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