



# Forward Booking Appointments: Is Your Practice Benefitting?

by Wendy Hauser, DVM  
Peak Veterinary Consulting

---

## INTRODUCTION

---

During the AAHA Yearly Conference in March 2015, the annual AAHA/IDEXX Laboratories State of the Industry report was presented. In addition to an in-depth evaluation of data and veterinary hospital survey results, this year's report included an analysis of 1,001 clients to further determine factors that owners rank as critical in strengthening their bonds with their veterinary hospitals. One major factor identified to help drive client attraction and retention was forward booking appointments.

“Forward Booking” appointments refers to the practice of scheduling the patient's next appointment before the client leaves the hospital. Forward booking appointments is a relatively common practice for medical re-evaluations with approximately 76% of hospitals reporting this practice, yet recent data suggests that only 11% of veterinary hospitals are utilizing this approach for semi-annual and annual preventive care examinations . What are the barriers to forward booking appointments?

## Perception

In my previous role as a technical services veterinarian, I visited an average of 20 hospitals per week. This provided a tremendous opportunity to discuss veterinary business operations and management with a wide variety of practitioners and managers. When the subject of forward booking appointments came up the reaction was often negative, with the owner or team member stating, “their clients don’t want to do this”. According to the results of the pet owner survey as presented in the State of the Industry report, “6 of 10 pet owners said they would forward book their next appointment before leaving the practice. In fact, nearly half of all pet owners said they prefer to as long as a reminder is given.”

---

**“ 6 of 10 pet owners  
said they would  
forward book their next  
appointment before  
leaving the practice. ”**

---

## Process

The implementation of forward booking appointments can be overwhelming. Follow the steps below to successfully incorporate this practice into your hospital’s daily operations:

### Obtain animal health care team buy-in

- Explain to the team that clients want tools to simplify preventive care. Forward booking is one such tool.
- Discuss the findings of the State of the Industry report. Despite our perceptions, most clients are used to this method in their everyday lives (example: human dental appointments) and like it.
- Discuss the benefits to the team in forward booking appointments. Possible benefits include more timely care for pets, fewer phone calls to schedule pets that are overdue to receive services, and an appointment schedule that runs more smoothly as preventive care appointments are scheduled in advance.

### Ask your team what concerns they have with forward booking appointments

To experience success with this system, the staff must be allowed to have their worries heard and engage in finding solutions as a team.

### The hospital must have an appointment schedule that is consistently available one year in advance

1. Designate a team member to be responsible for inputting the normal hospital operations schedule for the next 13 months.
  - If your hospital does not utilize a computer-based appointment scheduler, you will have to purchase the paper scheduling system for the following year to use instead.
2. Select a day of the month that that team member will be responsible for updating the schedule, so that it is

always complete for a year in advance.

- The schedule is updated one month at a time within a designated time frame.

3. Objections that might be encountered:

- “We do not know what the doctors’ schedules will be.” The hospital schedule regarding appointments is relatively stable. The doctors are scheduled normally, and adjustments are made to the timetable as needed.
- “It takes a lot of time to input the hospital schedule.” There is an initial time commitment. Once the schedule is in place for 13 months, it requires minimal time to update it one month at a time.

### Communicating the new policy with clients

1. Decide who will explain the new procedure to the clients.

- Will this be the responsibility of the technician, customer service representative or doctor? Clear communication is critical to this program’s success.
- In my hospital, what worked well was when the doctors initiated a brief conversation with the clients, explaining that we were beginning to schedule preventive care placeholder appointments in advance. The doctors went on to explain that my customer service representative would schedule that appointment before they left. It was extremely uncommon that any client objected.

2. Decide what will be said when forward booking the appointment.

- When clients understand the “why” behind the recommendation, there is better adherence: “Mrs. Smith, we are committed to keeping Fluffy healthy

and happy. Because animals age faster than humans, it is important to regularly schedule examinations in order to detect any diseases early. Dr. Hauser would like to see Fluffy in 6 months, which is the first week in February. How does Tuesday, February 2nd work?”

---

**“When clients understand the “why” behind the recommendation, there is better adherence.”**

---

3. Explain to the client that they will receive a reminder two weeks in advance of their appointment. If the appointment is not at a convenient time, it could be rescheduled during the reminder call.

- It is important to ask clients how they prefer to receive their reminders: phone, text, email, or postcard, and honor their preferences.
- Design a process to remind owners. Who is responsible for confirming the appointments? This is one of the most important parts of forward booking, because if clients are not reminded, they may not show up for the appointment. These confirmatory calls are important in maintaining healthy client relationships; clients do not enjoy missing appointments and the embarrassment they could feel is detrimental to client bonding.

4. Differentiate between forward booked appointments.

- Use color coding to designate forward booked appointments. It is necessary

that forward booked appointments are easily recognizable so that the advance reminder notification occurs two weeks before the scheduled appointment.

- By color coding forward booked appointments, hospital management can track the number of customer “no-shows”. This is an important metric; greater than 10% missed appointments indicates that the reminder process needs to be modified.
- Establish team goals for forward booked appointments, both made, and the percentage kept. Celebrate successes as a team!

---

“ ... embrace the concept of forward booking, everyone wins.”

---

## Example

When animal health care teams embrace the concept of forward booking, everyone wins. Our patients receive more consistent and timely healthcare, clients are appreciative of the ease of scheduling and teams benefit from smoother day-to-day operations with more client visits.

### Procedures Guidelines Forward Booking Appointments

Team member responsible: Sally

1. **Initial Action Step:** On August 25, 2020

Sally will input the hospital’s appointment schedule for the next 13 months, so that appointments could be booked from September 1, 2020 to October 31, 2021.

2. **Repeating Action Step:** On or around the 25th of each month, beginning on September 25, 2020, Sally will add an additional month’s schedule, so that on September 25 she will be updating the schedule to include November 2021.

- Why? By entering the schedule initially to include 13 months of appointments, clients can appropriately be forward booked for appointments occurring in 12 months. By designating a specific time of the month for Sally to update the schedule, the process of maintaining adequate appointments for forward booking is ensured.

3. To stay organized, Sally will program color codes for all forward booked appointments in the computer.

4. Doctors explain to clients when the pet’s next appointment should occur, and explain that the appointment will be scheduled by the CSR (customer service representative) before they leave.

5. CSR schedules the forward booked appointment on the calendar.

6. Two weeks before the forward booked appointment, the CSR reminds clients of their appointment, including what services are due. If the client does not confirm the appointment, two additional attempts to contact the client are made.

7. The hospital manager tracks the number of forward booked appointments that are kept compared to “no shows”. If there is >10% no-shows, modification of the reminder process is needed.

---

## ABOUT THE AUTHOR

---



Wendy Hauser, DVM is AVP, Veterinary Relations, Crum & Forster Pet Insurance Group. In 2015, she established Peak Veterinary Consulting, after working as an industry Technical Services Veterinarian. With a DVM from OK State, she has practiced for 30+ years as an associate, owner and relief veterinarian. She is highly engaged in AAHA leadership and currently serves as the AAHA Delegate to the AVMA House of Delegates. She is the co-author of "The Veterinarian's Guide to Healthy Pet Plans."

---

## REFERENCES

---

- <sup>1</sup> [https://idexxcom-live-b02da1e51e754c9cb292133b-9c56c33.aldryn-media.com/filer\\_public/46/cb/46cb2263-1009-4a0a-b1a8-f18eea3a5c89/aha\\_state\\_of\\_the\\_industry\\_2015\\_fact\\_sheet.pdf](https://idexxcom-live-b02da1e51e754c9cb292133b-9c56c33.aldryn-media.com/filer_public/46/cb/46cb2263-1009-4a0a-b1a8-f18eea3a5c89/aha_state_of_the_industry_2015_fact_sheet.pdf)
- <sup>2</sup> Forward Booking Appointments, Partners for Healthy Pets. [http://www.partnersforhealthypets.org/Tool\\_Track.aspx?id=370](http://www.partnersforhealthypets.org/Tool_Track.aspx?id=370)

*This is a restricted article sent to you for educational purposes only and may not be copied or disseminated without written consent from Peak Veterinary Consulting, LLC*

**ASPCA** PET HEALTH  
INSURANCE

