

TEACHING TARGET

A BUSY PRACTICE IS GOOD FOR BUSINESS, BUT SCHEDULING AND WORKFLOW MUST BE ORGANIZED TO POSITIVELY IMPACT VETERINARIANS, TEAM MEMBERS, AND CLIENT SATISFACTION.



Scheduling Appointments to Make the Day Flow Smoothly

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I recently spent a few days onsite with the new owner of a small animal practice. We had also met the previous evening and over dinner discussed her primary concerns.

She said the practice was extremely busy—a good problem to have—but the team spent the day running from 1 appointment to the next and she spent most evenings catching up on records because she had no time during the day.

As a result, she was sacrificing family time, team members were experiencing burnout, clients were experiencing long wait times for appointments, and patients were not receiving optimum care because of the hurried environment.

Many practice owners likely can relate to her situation.

The ideal flow cannot be achieved without strategic scheduling, so be sure to create an appointment schedule that benefits all involved by accounting for different appointment types, veterinarian availability, optimum team leverage, and client convenience.

A

n overwhelming practice schedule comes with many consequences that proper scheduling can dramatically ameliorate. For example, longer wait times have been shown to impact the client's experience and, therefore, the client's likelihood of returning to the practice. Clients give poor communication and customer service, which may follow from hurried appointments, as the most common reasons for leaving a practice (except for patients passing away or clients moving).¹

Practice owners wondering about the value of appropriate scheduling should consider the impact on the practice's bottom line. Use the following formula to calculate the potential revenue impact:

- Assume the average client has 2 pets.
- The client visits with each pet twice yearly.
- That client, on average, spends \$180 per pet, per visit.
- The client remains with the practice for 5 years,² on average.
- Lifetime client value = \$3600

Equating the loss of a client to cost shows clearly that running the most efficient practice possible benefits not only patients, clients, and all team members, including owners, but also the bottom line.

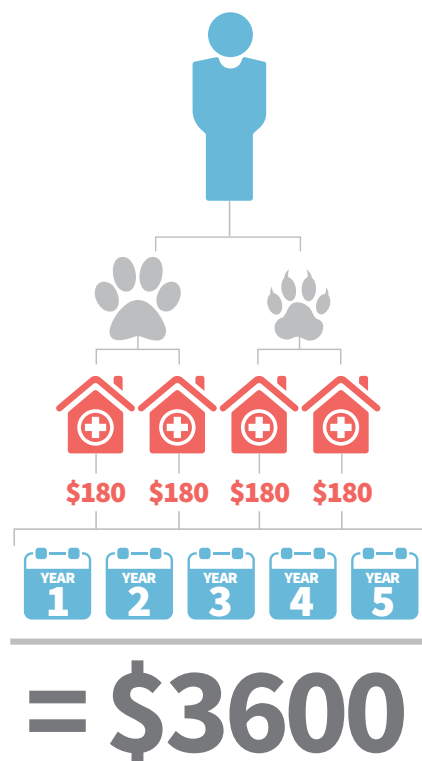
Establishing Appointment Flow

Fortunately, appointment flow can

reduce many owner headaches. Every emergency cannot be controlled and some days will always be more stressful, but steps can be taken to minimize these events.

Start by creating a visual map of the practice's daily flow. This helps recognize each client touchpoint and identifies inefficiencies and bottlenecks more easily. (See **Mapping a Practice Appointment Flow.**)

The ideal flow cannot be achieved without strategic scheduling, so be sure to create an appointment schedule that benefits all involved by accounting for different appointment types, veterinarian availability, optimum team leverage, and client convenience.



Consider conducting a time study, using a travel sheet to note the time spent on each portion of the client visit and comparing actual to scheduled time. If appointments consistently take longer than scheduled, check first for efficiency and training opportunities, and then consider building in small cushions of time when scheduling each appointment.

Also, defining the “perfect” client experience allows creation of a schedule that can accommodate the flow needed to provide patients with the best care, clients with a stellar experience, and team members with some sanity.

Conclusion

When a practice owner works with his or her team to

Mapping a Practice Appointment Flow

When the new owner constructed the ideal daily appointment flow for her practice and added elements to make the practice more client-friendly, she developed this map:

SCHEDULING THE APPOINTMENT

- The practice has a mobile-friendly website that allows clients to schedule appointments online. Most major practice management software systems make this easy.
- A client care team member should take the initiative and schedule an appointment when a client calls rather than wait for the client to request one.

CHECKING BEFORE CLIENTS ARRIVE

- A client care team member should review the appointment schedule to ensure adequate appointment time.
- He or she should also review patient files to anticipate any client or patient needs (eg, therapeutic diet, heartworm or flea preventives).

ENTERING THE PRACTICE

- A client care team member should greet the client and/or the patient by name.
- He or she should notify the appropriate veterinary nurse when he or she is taking the client and patient to an examination room; he or she should be specific and use names.

TRANSITIONING TO THE EXAMINATION ROOM

- A veterinary nurse should be notified the client and patient are waiting; when the veterinary nurse is ready in an examination room, a client care team member should walk the client and patient to the room and hand over the patient's files.

- The veterinary nurse should obtain the patient history and the reason for the appointment and, if appropriate, discuss any relevant preventive care topics.
- The veterinary nurse should exit the room and review the notes with the veterinarian; they should then walk into the examination room together.
- While the veterinarian conducts the examination and addresses client questions, the veterinary nurse should take notes.
- While the client is in the examination room, the client care team member should prepare any items noted from the patient file and have them ready for the client at checkout.
- After the veterinarian leaves the examination room, the veterinary nurse reviews instructions and books the client's next appointment, preferably using in-room technology that syncs with the appointment book.

REVIEWING THE VISIT

- The veterinarian or veterinary nurse may ask the client to write a Yelp or Google review while he or she is in the examination room waiting for prescriptions to be filled. This is another chance to ensure the client has no more questions.

CHECKING OUT

- If products or prescriptions were not delivered to the client in the examination room, the client care team member should have the items waiting for the client when he or she is walked to the reception area to check out.

Each practice's flow may look different and include more or fewer steps, but identifying each step can help identify areas for improvement.

formulate every step they want included in an appointment to ensure the kind of experience they want for their clients and patients, and knows how much time to allow for an average appointment, everyone benefits. ■

References

1. AAHA State of the Industry. Proceedings of the American Animal Hospital Association Conference. 2015; Tampa, FL. https://www.aaha.org/professional/media/aaha_state_of_the_industry_2015.aspx. Accessed May 2016.
2. Conrad B. I Am More Interested in Next Year's Visit: Lifetime Client Compliance. Proceedings of the American Animal Hospital Association Conference. 2016; Austin, TX. <https://www.aaha.org/austin>. Accessed May 2016.



TEAM TAKEAWAYS:

Veterinarians: Ensure the practice's scheduling and patient flow are as efficient as possible so all tasks, such as completing medical records, are carried out during the workday and personal time is not compromised.

Management Team: Create the perfect experience desired for all clients and patients and use that guideline to map a daily schedule that will give team members the time they need to do their job well, leading to better medicine, better job satisfaction, and reduced burnout.

Nursing Team: Obtain a thorough history, keep accurate notes of examination room conversations, and work closely with the veterinarian and client care team to improve efficiency and patient outcomes.

Client Care Team: Review the day's appointment schedule each morning for medications and therapeutic food refills, and take an active role in each appointment to help with overall appointment flow.

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