



Remind, Recall, Recheck: Applying the 3 R's to Today's Practice

Brenda Tassava, CVPM, CVJ, VLCE

VetSupport
New Orleans, Louisiana

When I was a client service supervisor nearly 20 years ago, my practice manager taught me the 3 R's—remind, recall, recheck—that refer to a rule of thumb for ensuring veterinary clients return to the practice. Every patient seen in a practice should have a reminder, recall, or recheck scheduled in the practice management software so no patient slips through the cracks.

However, the “reminder” of the 3 R's is due for an upgrade. Today's pet owners still need reminders, but a slightly different approach is necessary, one that is digitally driven and provides the convenient service they value.

Reminders

From Postcards to Technology

An appointment reminder is best used for services that will be due in 6, 12, or 36 months (eg, vaccinations, screening bloodwork and diagnostics, physical examinations [adult preventive care, senior preventive care]). Reminders in the form of postcards have long been mailed to clients but, more recently, veterinary practices have expanded their client reminder communication methods to include email and text messaging.

A practice's reminder success rate should be more than 60% for vaccination reminders, and preferably 75% to 80% following the last card or phone call.¹ If the practice is not seeing similar results, management should review protocols and adjust the frequency and/or type of reminders to increase the success rate. (See **Recommended Reminder Schedule**.)

Forward Booking

Looking Forward to the Future

The proactive approach of patient forward booking

(ie, scheduling a patient appointment before he or she leaves the current appointment) is simpler and more cost-effective than mailing multiple postcard reminders to elicit appointments. An appointment can be forward booked 3 weeks, 6 months, or even 1 year in advance.

Forward booking is widely practiced and well-received in other medical professions (eg, dentistry, optometry) by both professionals and their patients. When was the last time you left your dentist's office *without* an appointment for your next visit? When a patient is forward booked, space for his or her next visit is reserved, making it easy for the client to return without having to remember to call to schedule the next appointment.

The forward-booking rate can be calculated each month based on the number of patients seen that month that have an upcoming appointment. In March 2017, the average forward-booking rate for more than 1000 veterinary practices surveyed was 12%.² There is no current practice management benchmark, so management should monitor the success rate and periodically set goals for team members to increase the numbers.

Some teams are surpassing 12%; for example, Park West Veterinary Associates in Mt. Pleasant, South Carolina, has a monthly forward-booking rate of at least 65%. (See **Forward Booking Success Story**.)

Still Keeping to the Past

Remember, however, that forward booking is an addition rather than an alternative to the practice's reminder system, because reminders are still required so that clients do not forget appointments they scheduled months earlier. Forward booking's biggest advantage is that clients are more likely to proactively reschedule an appointment they already have in place, which cuts down on lapsing patients and ensures pets are getting the preventive and follow-up care they need in a timely manner.

Recommended Reminder Schedule

The author recommends the following schedule for routine preventive-care reminders that have not been forward booked.

- A postcard sent 6 weeks prior to the date the patient is due for the next visit*
- An email or postcard 4 weeks prior to the due date
- An email, postcard, or text message 2 weeks prior to the due date
- A text or phone call the week the service is due
- An email, postcard, or phone call 2 weeks after the service was due, if the client failed to make an appointment
- An email, postcard, or phone call 4 weeks after the service was due, if the client failed to make an appointment

*If an appointment is made, continue to send reminders until the services have been fulfilled.

Accepting a different way of doing things is the biggest hurdle for most practices. Frequent concerns are, *We do not have the veterinarian's schedule so far out*, and, *What if the veterinarian's schedule changes?* However, any practice can create a standard schedule template in the practice management software. The appropriate team member should regularly check the schedule about a month ahead for forward-booked appointments and for any veterinarian schedule changes from the standard template. Then there is enough time reschedule any appointments, preferably close to the time of the original appointment.

Conclusion

What about the 3 R's today? They are by no means obsolete—rather, forward booking actually strengthens the 3 R's. Forward booking improves patient health and wellness by assuring patients return to the practice when they need to be seen again, while also streamlining reminder processes and reducing costs incurred when team members spend time and effort chasing clients with reminders.

Consider Park West's success. The practice experienced no pushback or conflict from clients, who welcomed the ease of forward booking. Follow their example, including the "same veterinarian, same day, same time" rule, and you should see similar success. ■

References

1. Boss N. Client Reminder Systems. In: Ackerman L, ed. *Blackwell's Five-Minute Veterinary Practice Management Consult*. 2nd ed. Oxford, UK: John Wiley & Sons; 2014;2:16
2. Author's personal conversation with Martin Traub-Werner, CEO, VetSuccess, September 2018.
3. Author's personal conversation with Marian Park Rowland, CVPM, Park West Veterinary Associates, June 2017.



BRENDA TASSAVA, CVPM, CVJ, VLCE, works closely with practices around the country as a practice management consultant and owner of VetSupport. She has more than 18 years of practical veterinary business experience and authored *Social Media for Veterinary Professionals* in 2011.

FUN FACT: In a former life, Brenda hustled on the 9-ball circuit and was once ranked a semiprofessional player by the Women's Professional Billiards Association.

TAKE ACTION ✓

- 1 Use practice management software to generate automatic client reminders for progress appointments.
- 2 Remember that despite new technology, traditional reminders will still be needed for appointments made well into the future.
- 3 Never let a client leave the practice without a scheduled follow-up appointment.

Forward Booking Success Story

Park West Veterinary Associates embraced forward booking nearly 9 years ago. After realizing that human dentists and optometrists managed to forward book without a problem, practice manager Marian Rowland, CVPM, discussed the topic with her team.³

The Park West team's approach is "what's good for the pet is good for the practice; what's good for the practice is good for the staff," Rowland said. When the team members discussed forward booking, they realized that bringing pets back to the practice meant better patient care.

Rowland said team members develop a plan for every patient that includes letting clients know when their pet needs to be seen again and that the practice will take care of scheduling. Then, instead of a written appointment card, a team member simply farewells the client saying, *Nice to see you! We'll see you (in [3] weeks, or [6] months, or next year).*

Team members also follow the simple rule of same veterinarian, same day, same time, which helps them automatically schedule an appointment that is most convenient for the client. The practice management software program can set up appointment reminders that begin approximately 1 month ahead of the scheduled appointment. Park West uses Avimark's Rapport program, but a practice's software provider can help with recommendations for the easiest way to set up forward-booked appointment reminders.

"Our clients appreciate that we take care of their appointments," Rowland says, "and they don't have to remember to call us to schedule their pet's care."