

Forward Booking

Your Guide to Becoming a Practice Champion

Course Schedule: Forward Booking

Course Objective: This Workgroup focuses on the second section of the [Preventive Pet Healthcare workbook](#) and provides assistance to veterinary professionals on the path to becoming Practice Champions. As participants learn to complete the Forward Booking portion of the workbook, they will benefit from the structure and feedback provided by the program.

Final outcome: Participants will document a team-shared forward booking philosophy, create a written protocol and identify a consistent message for team members to communicate with clients regarding the importance of forward booking. For this process to be successful there must be a mutual agreement that forward booking applies to ALL patients.

Attendance: Weekly one-hour conference call meetings will be scheduled, although many sessions may be less than one hour. Participants will discuss accomplishments to determine areas in which assistance is needed to help to move the team forward.

Although attendance is not mandatory, the meetings help to keep the team on track and make progress.

Assignments: Assignments are outlined in the schedule. Attendees are encouraged to complete each assignment before the weekly call.

Discussions: The schedule provides discussion ideas for each meeting; however, if someone needs help, this will take precedence.

Accountability: A personal checklist is available to attendees. It is a helpful tool in becoming a Practice Champion.

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Please feel free to contact the facilitator with questions, issues or simply to chat.

Week	Topic	Assignment	Discussion	Accountability (for Practice Champion to complete)
1	Practice Champion Time Management	<p>Watch video covering forward booking (from 30.15 – 32:52 minutes found at vhma.org) and read section 6 (pgs. 61-70) in workbook</p> <p>View the key to forward booking video by Karen Felsted from toolbox on http://www.partnersforhealthypets.org/forward_booking.aspx</p>	Agenda , key points to discuss with owner, Karen Felsted video	<input type="checkbox"/> Video completed <input type="checkbox"/> workbook assignment read <input type="checkbox"/> Managed/Scheduled a time to work on this project <input type="checkbox"/> Set up meeting with owner to discuss forward booking concept
2	PDF Resources: 1.The Key to Forward Booking 2. Forward Booking Appointments: How to Fill Your Appointment Schedule	Read PDF handout from the toolbox on partnersforhealthypets.org “The Key to Forward Booking Appointments” Review the PDF resource and fill in individual team responsibilities http://www.partnersforhealthypets.org/forward_booking.aspx	Discuss PDF handouts and the importance of utilizing these tools to educate the team/ tie in to how this fits with section 1 and the whole idea of preventive pet healthcare	<input type="checkbox"/> Complete your practice team roles and responsibilities for your practice <input type="checkbox"/> Develop agenda list for owner meeting <input type="checkbox"/> Agenda completed and employer given a copy of prior to meeting <input type="checkbox"/> Meeting with owner completed

				<input type="checkbox"/> Order buttons and posters from partners for healthy pets
3	Preparation Checklist and Preparation of the PLC committee	Review survey results from team regarding forward booking and preparation checklist pg. 63 in workbook	Discuss survey results regarding forward booking in your practice	<input type="checkbox"/> Develop your Practice Leadership committee (PLC) if different from preventive healthcare project <input type="checkbox"/> Review survey results in forward booking section of previous employee survey <input type="checkbox"/> Schedule a meeting with the PLC <input type="checkbox"/> Send an email to the members of the PLC with all the information they need for the meeting inclusive of the two PDF forms and instructions to view Karen Felsted video <input type="checkbox"/> Locate a current forward booking protocol
4	Facilitating the PLC meeting	Workbook p. 66	Key points of PLC meeting	<input type="checkbox"/> Meeting with PLC
5	Creating a forward booking protocol	Workbook pg. 67	Key points needed in a forward booking written protocol	<input type="checkbox"/> Complete along with the PLC a written forward booking protocol <input type="checkbox"/> Provide employer with copy of written protocol <input type="checkbox"/> Set up team meeting
6	Team meeting preparation	Workbook pg. 69 Videos 1-6 from toolbox on http://www.partnersforhealthypets.org/forward_booking.aspx	Talking points for staff meeting	<input type="checkbox"/> create document that lists all the important talking points for staff members to reflect on

7	Team meeting	Review videos with team	<p>What you liked about videos</p> <p>Where is there room for improvement</p> <p>Ideas for what will work in our practice</p>	<input type="checkbox"/> Team meeting reviewing videos, introducing new campaign for forward booking, and role playing
8	Follow-up	Workbook pg. 70	<p>Team reactions</p> <p>What to work on to keep the new protocol in effect</p> <p>Follow up meeting with staff members and reporting</p>	<p>Congratulations</p>