

3-2-1 Insight-to-Action Guide

3 KEY TAKEAWAYS

The business case for technology

Online scheduling provides an opportunity to increase revenue, modernize operations, and improve efficiency.

Create a roadmap for change

Organizations can have their own inertia that is resistant to change. Limit the impact of change resistance by anticipating and addressing concerns from team members early in the process.

Plan for process evolution

Plan for a week or two of process evolution as the team adjusts to the new workflows. As the team uncovers unexpected issues, don't hesitate to make changes and be sure to overcommunicate.

2 QUESTIONS TO ASK

- Question for **team discussion** (Share your thoughts with your team)

Who should be the champion of your online scheduling project? This is a great opportunity to provide leadership opportunities for the non-veterinarian team members?

- Question for **self-reflection** (no need to share your answer or thoughts with your team)

What are your primary obstacles for implementing technology in your practice? What is the solution for each obstacle?

1 ACTION STEP (LEADER)

Make a commitment as a leader to follow through on at least one of the suggestions below:

- Assess technology readiness by identifying prerequisites of online scheduling which include PIMS, email, website, online forms, appointment reminders, texting, deposit collection.
- Assess organizational readiness by discussing the idea of online scheduling with key team members.

1 ACTION STEP (TEAM)

Make a commitment together as a team to implement at least one of the suggestions below. This will be your team behavior change.

- Identify an initial goal for implementation: which veterinarians, appointment types, and office hours are going to be available for online scheduling?
- Create a deposit policy: are deposits required for all online appointments or just new clients? Will you charge the entire exam fee or a portion?