THE 4-STEP FORMULA FOR

MASTERING PATIENT SELF-SCHEDULING



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EXECUTIVE SUMMARY:
The Not-So-Secret Formula for Self-Scheduling Success

Welcome to the world of patient self-scheduling, where efficient healthcare practices and happy patients become a reality. We've got the case studies and the formula to prove it.

You'll find out why 70% of patients prefer self-scheduling, and how one client was able to get 60% of all appointments scheduled directly by patient themselves.

At the heart of our approach are 3 core beliefs:

1. All patient service is patient care.
2. Smooth patient experiences only come from smooth staff experiences.
3. Provider trust comes from building quality care into every interaction.

These beliefs drive our formula for success in patient self-scheduling. And no, it doesn't involve a magic wand or bribing your patients (though we won't judge if you've tried).

Breaking problems down into formulas is a proven way to break complex challenges into clear, measurable, and actionable steps. That's why we've developed a formula that not only produces incredible efficiency but also provides better care and greater access for patients.

What you're about to dive into is a no-nonsense, insightful, but surprisingly effective approach to mastering patient self-scheduling. This approach to success is common in leading businesses. You'll see how Amazon's success formula and Apple's customer satisfaction metrics are remarkably similar to your attempts to get patients to book their own appointments.

What's Inside

This ebook guides you through four essential steps to mastering patient self-scheduling and achieving success.

1 Crash Course in Success Formulas - in Life & Business

- Ever wondered why your fitness tracker nags you about those 10,000 steps? It's because success in health and fitness relies on measurable metrics like BMI and workout consistency: the same principles apply to PSS.
- Learn how industry giants like Amazon, Google, and Netflix use data-driven formulas to dominate their fields. We'll draw parallels to PSS, showing you how the big players' strategies can work wonders for your patients seeking care.

2 The (not-so) Secret Formula to Patient Self-Scheduling

- Patient Self-Scheduling Success = Availability **x** Awareness **x** Conversion **x** Accuracy

  Each term has **one** metric measuring its success. This gives you something simple to watch.

3 Real-World Examples + Research

- To prove we're not making this up, we share real-life case studies and research. From increased patient satisfaction and reduced call volumes and higher patient retention and revenue growth, discover why PSS is a game-changer for modern healthcare practices.

Practical Tips for Mastering the PSS Formula

- Break down each component with relatable examples, both professional and personal. Whether it's making more time for hobbies or optimizing your appointment slots, we've got you covered.

By the time you finish, you'll see how practices like Lakeside booked 60% of their appointments online, how EmergeOrtho optimized staffing, and practical tips that will make patient scheduling second nature.

Crash Course in Success Formulas - in Life & Business

Ah, formulas. They're not just for making your high school math teacher feel important or calculating how many pizzas you need for a staff party. Turns out, these nifty little equations are the secret sauce to success in pretty much every aspect of life. Whether you're trying to build a business empire or just trying to fit into last year's jeans, there's a formula for that.

Let's start with something we can all relate to - the eternal struggle of personal fitness. Picture this: You've decided to embark on a journey to better health, armed with nothing but determination and a gym membership you've been ignoring for months.

Your success in this noble quest depends on four key factors:

1. **Availability**
   Having time to exercise (or at least pretending you do)
2. **Awareness**
   Remembering to do it (setting 17 phone alarms helps)
3. **Action**
   Actually going to the gym when planned (instead of Netflix and chill)
4. **Effectiveness**
   Performing exercises correctly (not just posing for gym selfies)

Believe it or not, your healthcare practice's self-scheduling success follows a eerily similar pattern. Spooky, right?

Success Formulas in Life

Now, let's dive into some formulas that'll make you sound smart at your next dinner party (or board meeting, if you're fancy like that). Each of these successes can be broken down into simple, actionable formulas. Here are some you might find relatable and useful:

Health and Fitness (e.g., BMI)



Formula

$$\text{BMI} = \frac{\text{Weight (kg)}}{\text{Height (m)}^2}$$

Explanation

Health professionals use the Body Mass Index (BMI) formula to assess whether an individual has a healthy body weight relative to their height.



Pro tip: *The formula doesn't account for muscle mass, so feel free to blame your "high BMI" on your bodybuilder-like physique.*

Productivity



Formula

$$\text{PRODUCTIVITY} = \text{Output} / \text{Input}$$

Explanation

Organizations use this formula to measure employee productivity by comparing the output (e.g., products produced, services rendered) to the input (e.g., hours worked, resources used).

Project Management Success

Formula 1

$$\text{PROJECT SUCCESS} = \text{Scope} + \text{Time} + \text{Cost} + \text{Quality}$$

Explanation

Project managers use this formula to ensure projects are completed within the agreed scope, time, cost, and quality parameters. Financial Ratios (e.g., Profit Margin)

Formula 2

$$\text{PROFIT MARGIN} = \frac{\text{Net Profit}}{\text{Revenue}} \times 100$$

Explanation

Businesses use financial ratios like profit margin to assess their financial health and performance. It's like calculating how much of your paycheck is left after bills, food - but for companies.

Customer Retention Rate

Formula

$$\text{CUSTOMER RETENTION RATE} = \left[\frac{(E - N)}{S}\right] \times 100$$

Where

- **E** Number of customers at the end of a period
- **N** Number of new customers acquired during the period
- **S** Number of customers at the start of the period

Explanation

This formula helps businesses understand how well they are retaining their existing customers over a specific period.

Success Formulas in Industry Giants

Now that we've covered some life-related formulas, let's see how the big players in the business world use similar principles to drive their success. It's like peeking behind the curtain at Oz, except instead of a little man with a microphone, you'll find a bunch of nerds with spreadsheets.

Amazon Formula:
Customer Satisfaction and Operational Efficiency

Metrics Used: Net Promoter Score (NPS), Customer Retention Rate, Delivery Efficiency

Description: Amazon frequently highlights its focus on customer satisfaction and operational efficiency. They use metrics like Net Promoter Score and their Prime service is basically the gold standard of for service and efficiency.

Google Formula:
Ad Revenue Optimization

Metrics Used: Click-Through Rate (CTR), Conversion Rate, Return on Ad Spend (ROAS)

Description: Google Ads showcases how businesses can optimize their advertising spend using detailed analytics and performance metrics. Click-Through Rate is a fancy way of saying "How often do people click on stuff?" and Return on Ad Spend equals "How much money did you make from annoying people with ads?"

Apple Formula:
Product Quality and Customer Loyalty

Metrics Used: Customer Satisfaction Score (CSAT), Net Promoter Score (NPS), Product Return Rate

Description: Apple emphasizes its high customer satisfaction and loyalty metrics in its marketing. Apple's formula is simple: Make shiny things people love.

Netflix Formula:
Customer Satisfaction and Operational Efficiency

Metrics Used: Viewer Retention Rate, Content Engagement, Personalized Recommendations

Description: Coca-Cola's marketing campaigns often feature data on brand engagement and the effectiveness of their advertising strategies. As part of Brand Engagement, they track Brand Awareness (can you picture their logo? Congratulations, you're part of their success) and Customer Engagement.

Coca-Cola Formula:
Customer Satisfaction and Operational Efficiency

Metrics Used: Brand Awareness, Marketing ROI, Customer Engagement

Description: Coca-Cola's marketing campaigns often feature data on brand engagement and the effectiveness of their advertising strategies. As part of Brand Engagement, they track Brand Awareness (can you picture their logo? Congratulations, you're part of their success) and Customer Engagement.

Tesla Formula:
Manufacturing Efficiency and Innovation

Metrics Used: Production Rate, Delivery Efficiency, Customer Satisfaction

Description: Tesla frequently highlights its use of data and metrics to drive innovation and efficiency in its manufacturing processes. They measure things like Production Rate (how quickly they can turn sheets of metal into vehicles) and Customer Satisfaction (how smug Tesla owners feel at dinner parties).

Breaking problems down into formulas is a highly effective approach for producing success because it transforms complex challenges into manageable, actionable steps. Breaking problems down into formulas is like turning life into a game of Lego. Instead of staring at a massive, intimidating challenge, you're looking at manageable, colorful blocks that you can tackle one at a time.

Formula's simple structure cuts out the BS and forces us to focus on what really matters.

But here's the real kicker: formulas make success replicable. Once you've cracked the code, you can apply it again and again.

The (not-so) Secret Formula to Patient Self-Scheduling

We're about to unveil the secret formula to patient self-scheduling. It's so secret, we're plastering it right here in big, bold letters.

PATIENT SELF-SCHEDULING SUCCESS =

Availability x Awareness x Conversion x Accuracy

It's simpler than it looks, kind of like assembling IKEA furniture.

If 100% of your appointments are available online, 100% of your patients decide to use this nifty online system, 100% of those actually complete the booking process, and the bookings are 100% accurate, then voila! You've achieved self-scheduling nirvana.

But let's be real, achieving 100% in anything is about as likely as finding a unicorn in your backyard.

So, let's break this formula down into bite-sized pieces:



Availability (% of Calendar Online)

This is opening up more appointment slots for online booking.

It's similar to blocking out more time in your schedule for important personal projects. Like when you finally decide to tackle that DIY project you've been putting off since 2015.

The more appointment slots a practice makes available online, the more opportunities patients have for scheduling appointments.

Pro tip: *How important is this? This metric measures Access to Care.*

Awareness (% of Patients Driven to PSS Page)

This involves marketing the online scheduling option to patients. It's like setting reminders on your phone to prompt you to work on your goals.

Just like any product or service, patients need to be made aware of the online scheduling option through marketing efforts such as email campaigns, website banners, and in-office signage.

Pro tip: *You want this larger than 100%. It can drive your acquisition funnel.*

Conversion Rate (% bookings vs initators)

This is the percentage of patients who complete the scheduling process once they start it. In your personal life, it's like how often you actually go to the gym when you plan to. We're looking at you, January resolution-makers!

Accuracy Rate (% right patient, right time, right visit reason, right provider)

This ensures patients are booked into the right type of appointment with the right provider. It's comparable to how effectively you use your gym time when you go. Are you actually working out, or just taking selfies in the mirror?

Accuracy in booking means minimizing errors and ensuring a smooth experience for the patient, practice, and provider.

Each element of our not-so-secret formula requires different capabilities and expertise. It's like trying to assemble the Avengers of healthcare scheduling - you need a diverse team with superpowers in technology, marketing, user experience, and data analysis. And let's not forget the most elusive superpower of all: getting doctors to agree on something.

This ebook contains tips for each of these. We've seen firsthand how those tips lead to success. Let's dive into those successful case studies and research that highlight the practical application of this formula. These examples will provide real-world insights into the strategies and tactics that have led to remarkable improvements in patient self-scheduling.

FROM FORMULA TO FORTUNE:
Real-World Success in Patient Self-Scheduling

Lakeside Pediatrics & Clark Buurma

Lakeside Pediatrics, a healthcare provider in Lakeland, Florida, faced a crisis that challenged its ability to continue serving patients efficiently. This is a story of how one man, armed with nothing but a powerful formula and an unquenchable thirst for efficiency, transformed a practice from scheduling chaos to patient-pleasing paradise.



Meet Our Hero

Clark Buurma,
Administrator Extraordinaire

Clark is an advocate of objective and formulas to guide decision making. With 12 providers and 60 staff members across two locations, the practice relied heavily on a cumbersome Excel-based scheduling system.

Clark knew something had to change.

The Villains (AKA "The Excel Nightmare"):



A scheduling system more complex than a Rube Goldberg machine
The complexity of a large Excel sheet posed a substantial challenge for staff, requiring extensive time and effort to manage daily schedules.



Staff training that felt longer than waiting for a doctor when the waiting room is full
The elaborate scheduling system necessitated extensive training for new staff, increasing their onboarding time and workload.

More errors than a game of telephone played by a hundred people
Despite the efforts to keep things simple, frequent scheduling errors were a significant issue with the Excel-based system. These errors led to patient dissatisfaction and further strained the already burdened staff.

The Not-So-Secret Formula:

SUCCESS = (% of Calendar Online) x (% of Patients Driven to PSS Page) x (Conversion Rate) x (Accuracy Rate)

After a series of storms created a logistical nightmare of cancellations, moving schedules, and errors, Clark embarked on crushing this issue with the forma once and for all patients.

Ensuring Accuracy: He started with accuracy. He found a Healthcare CRM system, CareDesk, that would encapsulate the logic in his spreadsheets into scheduling directly into his PM. This system reduced errors and allowed call center agents to get up to speed quickly and without errors. He then turned this system on for patients.

Maximizing Calendar Availability: With the help of a physician champion advocating to his peers, Clark was able to open up the floodgates, making most of the appointments available online.

Boosting Conversion Rates: Clark was adamant about streamlining and simplifying the booking process. Armed with research about patient care benefits (see below), he continued working with providers until patients could book by answering no more than 4 questions!

Driving Patients to Self-Schedule: Clark launched a marketing campaign that was not fancy – just consistent. Not only did a scheduling button highline the website, but every single email, every newsletter, and every Facebook post is required to include a shortlink to self-scheduling.

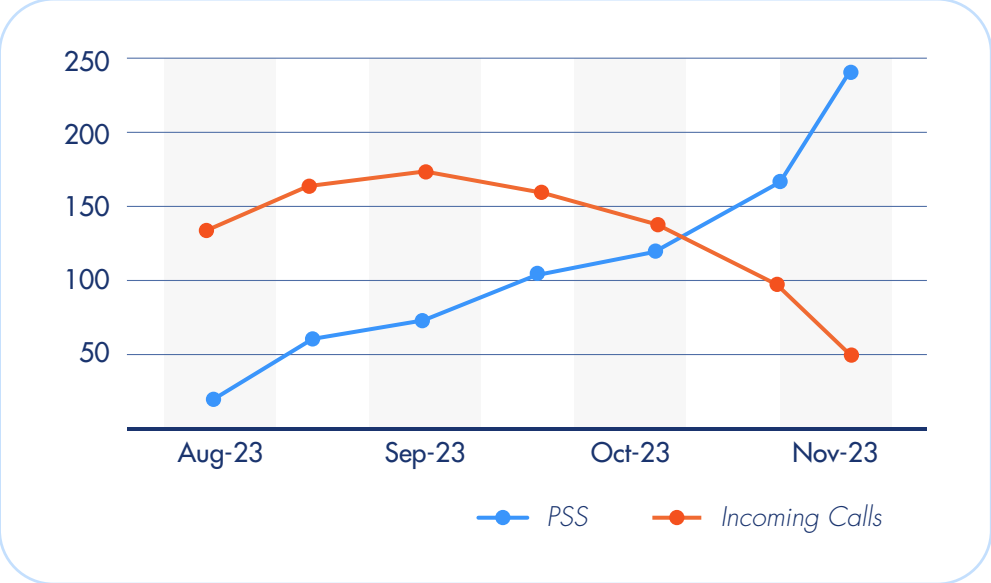
Results

In less than a year, Clark's implementation of the formula (with an assist from CareDesk) led to:

60% of all appointments being self-scheduled

Skyrocketing patient satisfaction (turns out, people like convenience.)

The rise of patient self-scheduling corresponded to lower call volumes.



Virginia Women's Center & Wesley Ralston

Virginia Women's Center (VWC), a division of Privia Women's Health with five office locations and 44 providers, was juggling the demands of 44 providers across 5 office locations, drowning in a sea of 140,000 annual calls.

Meet Our Hero

Wesley Ralston,
Director of Clinical Informatics

With a commitment to "radical convenience" for patients, Wesley knew something had to change in their scheduling process.

The Villains (AKA "The Scheduling Nightmares"):

- Lengthy onboarding for patient coordinators (4-6 months)
- Inconsistent documentation across different staff members
- Lost patient requests and unreasonable callback times
- Limited visibility into real-time operations

Wesley's Eureka Moment: The Power of Self-Scheduling

Armed with our magical formula and Keona Health's CareDesk, Wesley set out to transform VWC's scheduling landscape.

The Epic Quest:

Ensuring Accuracy: Wes implemented a healthcare CRM to encapsulate the logic of their scheduling system directly into their practice management (PM) system. This reduced errors and allowed call center agents to get up to speed quickly and accurately. The system was then extended to patients, ensuring that self-scheduling was equally accurate and efficient.

Maximizing Calendar Availability: By advocating for comprehensive scheduling availability, Wesley opened up 90% of visit reasons for online scheduling, tremendously enhancing patient access to care.

Boosting Conversion Rates: Wes streamlined and simplified the booking process. By making the process mobile-friendly, 61% of self-scheduled appointments were booked on mobile devices.

Driving Patients to Self-Schedule: With no marketing (yes, you read that right), Wesley managed to get 25% of appointments self-scheduled in just 6 months!

Results

In just 6 months, with zero marketing:

- 25% of all appointments are now self-scheduled
- 61% of self-scheduled appointments are booked on mobile devices
- 90% of visit reasons are available for online scheduling
- Patient coordinator onboarding time reduced from 4-6 months to just 1-2 weeks

Patient self-scheduling improves patient satisfaction, reduces scheduler burden, and gives overflow options for spikes in scheduling volume.

- Wesley

Research: Why Patient Self-Scheduling Works

Extensive research supports the effectiveness of patient self-scheduling. We're about to hit you with some numbers that'll make you wonder why you didn't jump on the self-scheduling bandwagon sooner. There are multiple benefits that contribute to its success:

Increased Patient Satisfaction

- **Immediate Booking:** **1 in 5 patients cite waiting for a practice to open to book an appointment as their greatest pain point.** Immediate online booking eliminates this issue, offering instant gratification.
- **Online Preference:** When given the option, **70% of patients choose to book online,** compared to just 20% who prefer to book by phone. This preference highlights the growing demand for digital solutions in healthcare.

Hedges, L. (2024, April 23). Online booking options can get you more clients. GetApp. https://www.getapp.com/resources/research-online-booking-importance-of-appointment-scheduling/

Reduced Call Volume

- **Waiting Time:** **36.4% of patients reported that waiting** too long on hold was their biggest pain point when scheduling an appointment. That's a lot of people who've memorized your hold music playlist.

Zhang, H., Ma, W., Zhou, S., Zhu, J., Wang, L., & Gong, K. (2023). Effect of waiting time on patient satisfaction in outpatient: An empirical investigation. Medicine, 102(40), e35184. https://doi.org/10.1097/md.0000000000035184

- **Shorter Queues:** Lower call volumes translate to shorter waiting times on the phone, significantly boosting patient satisfaction.
- **Staff Efficiency:** With fewer scheduling calls to handle, staff can focus on other critical tasks, enhancing overall productivity and reducing burnout.

Patient Acquisition

- **Provider Choice:** About **a third of patients would be more likely to choose a new provider** if that provider offered online booking options.

Hedges, L. (2024, April 23). Online booking options can get you more clients. GetApp. https://www.getapp.com/resources/research-online-booking-importance-of-appointment-scheduling/



Patient Retention

- **Preference for Convenience: 4 in 5 patients prefer a physician who offers online scheduling.** The 5th patient is probably your grandpa who still uses a rotary phone.

Online appointment scheduling helps staff & patients | HealthGrades. (2023, July 5). Healthgrades Partner Solutions. https://b2b.healthgrades.com/insights/blog/online-appointment-scheduling-helps-staff-and-patients/



Increased Revenue & Growth

- **Downstream Revenue:** According to ECG, the average patient retained represents downstream revenue of $18,300 over five years. This substantial figure underscores the long-term financial benefits of patient retention.
- **Specialty Services Impact:** PatientGain breaks down the money spent on patient acquisition per specialty, with substantial amounts typical for significant specialties and acute services. Efficient self-scheduling can optimize these investments, maximizing returns.

PatientGain.com. (2024, August 26). How to calculate patient acquisition Cost (Recommended). PatientGain: Healthcare Marketing Expert Company in USA and Canada. https://www.patientgain.com/calculate-patient-acquisition

Self-scheduling can help you hit your business numbers because it frees your staff, is available anywhere, and patients want it, so it drives loyalty, acquisition and hence revenue.

If it is not clear that patient self-scheduling has amazing potential these numbers show it is far more than a fancy 'add-on' feature. Patient self-scheduling drives substantial benefits for both patients and healthcare providers.

It's also evident that there's a significant gap between its potential and the actual implementation. Research indicates that less than 5% of all appointments are booked online. That's right. 5%. It's like having a Ferrari in your garage and only using it to drive to the mailbox. This stark contrast highlights the challenge: The difference between that shiny 70% of patients who want to book online and the measly 5% who actually do comes down to one thing: successfully implementing our not-so-secret formula.

The difference between that shiny 70% of patients who want to book online and the measly 5% who actually do comes down to one thing: successfully implementing our not-so-secret formula.
And that's what we'll turn to next. By mastering the components of the self-scheduling success formula—availability, awareness, conversion, and accuracy—you can bridge this gap and unlock the full potential of patient self-scheduling for your practice.

We'll break down each component of our formula:



% of Calendar Online



% of Patients Driven to PSS Page



Conversion Rate



Accuracy Rate

And we'll show you how to maximize each one, turning that sad 5% into a number that'll make your accountant do a happy dance.

FROM 5% TO FABULOUS:
Implementing the Self-Scheduling Formula

Accuracy

We start with accuracy, because this is where the magic starts. Nailing your Accuracy Rate is like being the Harry Potter of healthcare scheduling - it's all about getting the right patient, in the right place, at the right time, in the right appointment with the right doctor.

This metric is also critical for gaining providers' trust. Failing to achieve accuracy in patient self-scheduling can lead to double-bookings, incorrect appointments, and significant patient dissatisfaction, ultimately disrupting clinic operations and damaging the practice's reputation.

Before we dive into solutions, it's crucial to understand why achieving accuracy in healthcare scheduling is so challenging. The root of this challenge lies in what we call 'Clinical Complexity'.

The Hidden Villain: Clinical Complexity

Before we dive into solutions, let's talk about the elephant in the exam room: Clinical Complexity. It's the supervillain of healthcare scheduling, making self-scheduling about as easy as performing brain surgery while riding a unicycle.

What Makes Healthcare Scheduling So Tricky?

- **Diverse Patient Needs:** Patients come with more varieties than a box of assorted chocolates. Each one needs a personalized approach, and your staff needs to be part Dr. House, part mind reader to figure it all out.
- **Regulatory Red Tape:** Healthcare has more regulations than a space shuttle launch. HIPAA, data security, clinical procedures - it's enough to make your head spin faster than a centrifuge.
- **Multidisciplinary Mayhem:** Coordinating care is like herding cats... if the cats were all specialists with packed schedules.
- **Tech Tangle:** Integrating EHRs, telehealth, and CRM systems is about as straightforward as untangling your holiday lights... blindfolded.
- **Scheduling Sudoku:** It's not just about finding an open slot. It's about juggling cancellations, rescheduling, and provider availability while playing "Beat the Clock" with urgent patient needs.
- **Insurance Insanity:** Navigating insurance and billing is like trying to solve a Rubik's cube... that changes colors every time you turn it.

The Complexity Multiplier

Now, multiply all of this by every provider, every appointment type, and every possible combination thereof. Suddenly, you're not just juggling balls - you're juggling chainsaws, on a tightrope, over a pit of scheduling nightmares.

Take one mental health practice we know. They have 72 primary diagnoses, 73 secondary diagnoses, 4 service types, different rules for new vs. established patients, and 160 provider preferences. The total possible combinations?

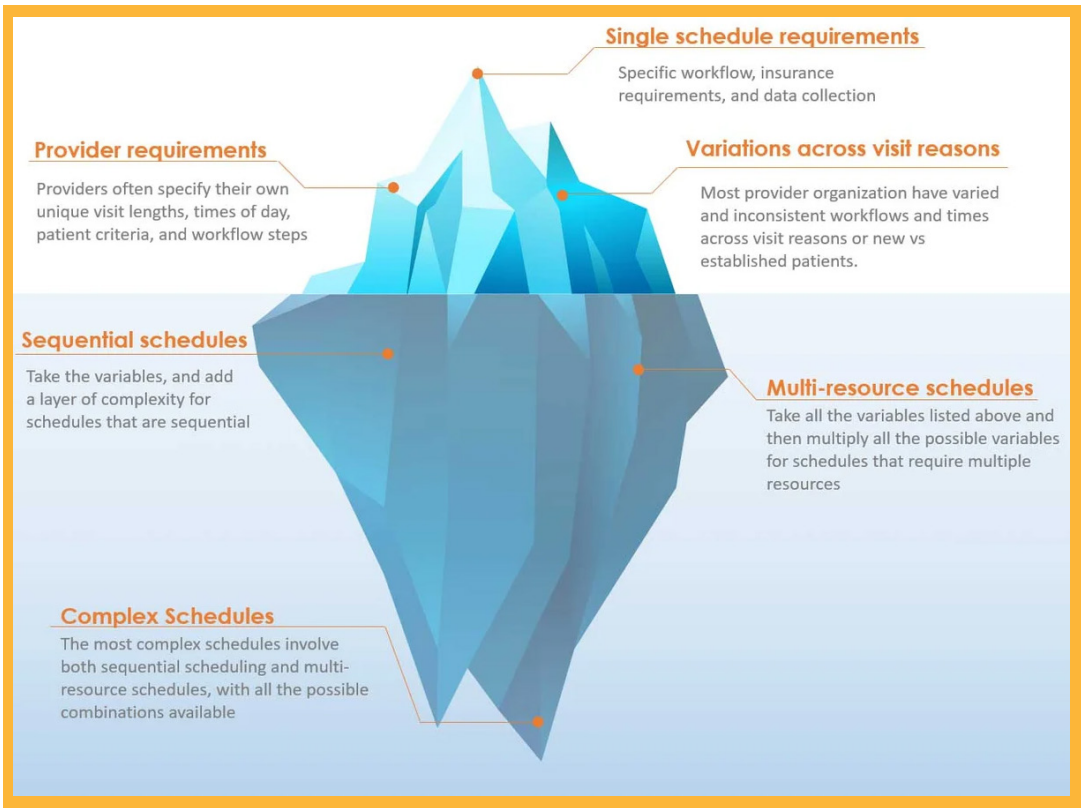
Nearly 7 million! It's no wonder schedulers often rely on reference materials thicker than a George R.R. Martin novel.

The Scheduling Showdown: Flexibility vs. Complexity

So, how do you tackle this Goliath of complexity? You've got three options:

1. **Standardize and Simplify:** Cut down on complexity, but risk provider satisfaction. It's like telling a chef they can only use three ingredients.
2. **Embrace the Chaos:** Keep your providers happy, but watch your costs skyrocket faster than a SpaceX rocket.
3. **Automate the Complexity:** Use smart software to handle the heavy lifting, keeping both your providers and your budget happy.

Now that we've unmasked the villain of our story, let's see how our accuracy-boosting strategies can help you defeat Clinical Complexity and become the superhero of self-scheduling!



Ensuring Accurate Bookings (Or: How to Avoid Scheduling Chaos)

- **Data Verification:** Implement systems to verify patient information and appointment details. This step ensures that the information entered by patients is accurate and complete, reducing the chances of errors and miscommunications. It's like spell-check, but for preventing medical mixups.
- **Training:** Ensure that both staff and patients are well-informed about the scheduling process. Staff training should focus on the proper use of the scheduling system, while patient education can include guides or tutorials on how to use the online booking system effectively.
- **Technology:** A Healthcare CRM, like CareDesk, can enforce your business rules, automatically check for conflicts and validate entries, ensuring a smooth and error-free scheduling experience. It's your new best receptionist, never sleeping and never tired of double-checking. Saving a small % of errors each year typically pays for the software. The best software will be able to handle these killers of accuracy:



Provider preferences: Dr. Smith only sees women on Mondays and Men on Tuesdays, back pain after 11am, and so on



Multi-resource appointments: say the visit requires equipment, nurse, & doctor



Insurance requirements: nothing says "party" like insurance verification



Surgery: special workflows and preapprovals are often required



Sequential appointments: whether back-to-back or every week or every month



Patients who need to pay first: sometimes the best 'reminder'

Carefully Plan Patient-Facing Questionnaires

- **Minimize Questions:** Spend time to carefully design patient-facing questionnaires to strike a balance between gathering essential information and providing a smooth user experience.
- **Prioritize Critical Information:** Balanced Questionnaires: Ask the most critical questions upfront to ensure accurate scheduling and defer non-critical questions to later stages of the interaction. This approach minimizes the burden on patients while still collecting the necessary data for accurate bookings.

The Callback/Textback Model: For When Things Get Complicated

No matter how hard you work to simplify, sometimes scheduling isn't straightforward. For the most complex cases that even an AI can't handle, try implementing the Callback/Textback Model (text preferred). In this model, the patient submits information and the data is sent to a queue where a human can handle the most complicated tasks and validate the information. "Callback" means the human calls back. The downside of this is that the gains are offset by the 'game' of phone tag. Often preferred is a "Textback" model where your staff sends a tailored link to the patient for a pre-configured bot to finish the interview or an online chat. Whether the interaction is callback or textback, the result is the patient is scheduling these complicated appointments online with assistance.

You and your staff still boost the accuracy rate and gain many of the advantages of online scheduling for the organization. This approach reduces the frustration of long wait times, reinforces online scheduling as a habit, and ensures that most needs are addressed promptly.

Availability: % of Calendar Online

Maximizing the percentage of your calendar available online is a key component of the self-scheduling success formula. By ensuring more appointment slots are accessible for online booking, you can significantly enhance patient satisfaction and operational efficiency.

Maximize Appointment Availability

- **Open the Schedule:** Include a broad range of providers, specialties, and appointment types, ensuring both new and existing patients can find and book appointments easily.
- **Calendar Blockers:** Address potential obstacles such as surgery schedules, multi-resource requirements, insurance constraints, provider preferences, and patients who need to settle outstanding bills.

Tips for Addressing Blockers

- **Follow Accuracy Tips:** Many of the blockers are only blockers because it is hard to achieve accuracy. For these, follow the accuracy tips, above, including utilizing a Healthcare CRM.
- **Think Through Visit Types:** Understand the necessary information for each visit type upfront and simplify the booking process to minimize barriers for patients.
- **Pilot Programs:** Start with a pilot group of providers willing to open their calendars for online booking. Use data from this initial launch to build trust in the system and encourage wider adoption.
- **Provider Preferences:** Educate providers on the benefits of online scheduling, emphasizing how it can increase their efficiency while retaining control over their schedules. Show them it's not about losing control, it's about gaining sanity.
- **Change Management:** Promote a culture of openness to change among providers and staff. Address resistance proactively, foster a growth mindset, and model desired behaviors and attitudes to support the transition. Patience is key!

Preparing Your Organization

- **Flexible Scheduling Protocols:** Utilize Keona's flexible protocols to make the majority of provider schedules available online without sacrificing control over scheduling parameters.

- **Consult Specialists:** If certain scheduling workflows seem too complex, consult Keona onboarding specialists for tailored solutions that can streamline these processes.
- **Alternative Models:** For workflows that cannot be entirely managed online, implement Keona's callback or textback model to maintain patient satisfaction while ensuring necessary staff interaction.

Awareness: % of Patients Driven to PSS

The principle here is awareness. Driving patients to use the Patient Self-Scheduling (PSS) system is critical to its success. This involves strategic marketing and engagement efforts to ensure patients are aware of and motivated to use online scheduling.



Marketing's Role

- **Website:** Ensure scheduling links are prominently placed on the homepage, header, footer, multiple pages, and for each provider- if there's a pixel, there should be a link.
- **Ads & Search Engines:** Utilize Google local, Google Ads, and Facebook Ads with direct links to the scheduling page. These ads can capture patient interest and drive traffic to the PSS page.
- **Newsletters & Emails:** Include scheduling links in all patient communications, such as newsletters and emails. This can be some of the biggest drivers of visits. Regular reminders keep the option top-of-mind for patients.
- **In-Office Signage:** Promote online scheduling within the office using signage and brochures. Visible reminders encourage patients to consider online booking during their visit.
- **SMS Campaigns:** Send text messages with links to the scheduling page. SMS campaigns can reach patients directly on their mobile devices, providing a convenient and immediate way to book appointments.
- **Phone System Awareness:** Include messages in the phone tree reminding callers about online scheduling.

Volume Blockers

- **Hidden Links:** Ensure all links to the scheduling page are easy to find and not buried within the website or emails.

  Spoiler alert: Your patients aren't going to look that hard.

- **Emails Without Links:** Always include a scheduling link in every email. An email without a scheduling link is like a doctor without a stethoscope - technically functional, but missing a key tool.
- **Newsletters Without Links:** If your newsletter doesn't have a scheduling link, is it even a healthcare newsletter? (Philosophical questions for $500, Alex!)

Driving Patient Engagement

- **Awareness:** Educate patients about the existence and benefits of online scheduling. Highlight how it saves time, reduces wait times, and offers convenience.
- **Calls to Action:** Sprinkle "Book Now" buttons like confetti. Make the process as intuitive as possible.
- **Repetition:** Continuously reinforce the message across various channels. Repeat your message more often than a toddler asking "Why?" Because eventually, it'll sink in (for both the toddler and your patients).
- **Call Deflection Solution:** Offer patients waiting in the phone queue an option to receive a scheduling link via SMS.

Your goal is to make booking online so omnipresent and easy that patients start to wonder if there's any other way to schedule an appointment. This not only enhances patient satisfaction but also optimizes your practice's efficiency and operational flow.

Conversion Rate

Maximizing the conversion rate is crucial for the success of patient self-scheduling (PSS). This involves ensuring that a high percentage of patients who visit the scheduling page complete the booking process. Here are some tips and strategies to improve conversion rates:

Tips for Improved Conversion Rate

- **Structured Decision Tree:** Make the first visit reason selection clear and 3rd grade level. Guide them through selection while avoiding medical terminology.
- **Simplify CareFlows:** Avoid asking multiple questions unless strictly necessary. Remember Clark Buurma's advice that simplified processes are more user-friendly and reduce abandonment rates.
- **Minimize Dead-End Points:** Nothing kills the online scheduling vibe faster than being told to pick up the phone. Reduce instances where patients are prompted to "Call the Office."
- **Inclusive Scheduling:** Allow both new and existing patients to schedule appointments online to widen your user base. Discrimination is bad, m'kay? Unless it's discriminating against inefficient scheduling practices.
- **User-Friendly Design:** Use pleasant colors and consistent images for providers and locations to create a visually appealing experience.
- **Avoid Walls of Text:** Keep provider information concise and easy to read. Large blocks of text can be overwhelming and discourage users from completing the process.

Conversion Rate Blockers: The Villains of the Scheduling World

- **Complex Processes:** Overly complicated booking processes can frustrate patients and lead to abandonment.
- **Unclear Instructions:** Lack of clear guidance on how to complete the booking can confuse patients.

- **Lack of User-Friendly Design:** If your scheduling system looks like it was designed in 1995, it's time for a makeover.



Optimizing the Scheduling Experience:
(Or: How to Make Patients Actually Enjoy Booking Appointments)

- **Simple Navigation:** Limit patient choices to 3-5 at a time. Simplified navigation helps patients move through the process quickly and efficiently.
- **Ample Appointment Options:** Provide plenty of appointment options and ways to expand search results if the initial options don't meet the patient's needs. Adding options prevents drop-offs.
- **Avoid Redirections:** Minimize instances where patients are redirected to call the office. Because nothing says "We value your time" like making someone start the whole process over again. Use callback/textback models to handle complex scheduling needs without losing progress.

Remember, folks, a high conversion rate is like a good doctor - it makes people feel better without them even realizing it. Your goal is to make the scheduling process so smooth and effortless that patients wonder if they accidentally booked a spa day instead of a doctor's appointment.

LEVELING UP:
The Patient Self-Scheduling Maturity Model

Remember when we talked about your journey to better health at the beginning of this ebook? Well, implementing patient self-scheduling is a lot like getting in shape. You can't go from couch potato to marathon runner overnight. You need to build your strength, increase your endurance, and maybe invest in some snazzy running shoes along the way. That's where our Patient Service Maturity Model comes in.

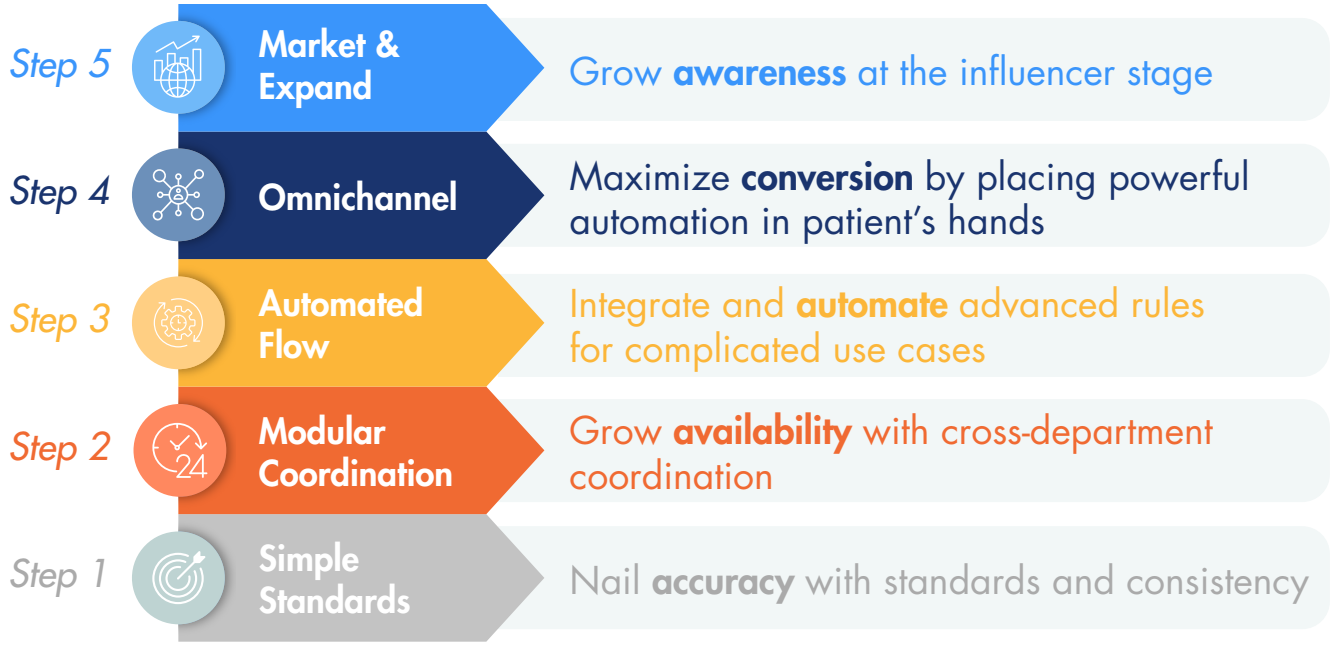
To ensure your organization is fully prepared, it's essential to understand and implement a comprehensive service maturity model. Think of it as your personal trainer for scheduling fitness.

Just like you wouldn't start your fitness journey with an ultramarathon, you shouldn't dive into full-scale self-scheduling without proper preparation. In the world of scheduling, the call center is the gym where this preparation takes place. The maturity model outlines the progression from establishing simple standards (with formulas!) to creating a fully integrated, omnichannel patient engagement system. Each stage builds on the previous one, ensuring a seamless transition and robust framework for handling patient interactions.

Here's how the maturity model can guide your organization to self-scheduling success.

Overview of the Model

Our Patient Service Maturity Model has five levels, each representing a different stage in your scheduling fitness journey:



Patient Service Maturity Model

Each level builds on the previous one, gradually transforming your practice from a scheduling weakling into a self-scheduling powerhouse.

Standardize (Accuracy)

The foundation for online accuracy starts with call center accuracy. This is the 'Couch to 5K' of scheduling. Just like establishing a consistent workout routine, simple standards are essential for taming the complexity of healthcare and ensuring high-quality patient care across all interactions.

When you're out of shape in the standardization department, your call center faces these challenges:

- Unknown call types and distribution
- Lengthy training processes
- Inconsistent patient responses
- Missing or inconsistent documentation
- High abandonment rates and long wait times

But once you've established your standardization routine, you'll start seeing gains:

- Clear insights into your call types, like a fitness tracker for your call center
- Consistency in call handling & answer rates - your scheduling six-pack
- Training time reduction - from couch potato to call handling pro in record time
- A standard staffing model that fits like a well-chosen workout outfit
- Patients gaining a consistent experience no matter who they talk to - like a perfectly choreographed group fitness class

Implementing simple standards is like mastering proper form in your workouts. It might feel awkward at first, but it's the foundation for everything that follows. It reduces the risk of injuries (or in this case, errors and inconsistencies), improves efficiency, and sets you up for long-term success.

Coordinate (Availability)

Coordination transforms the efforts of your call center into collective success, ensuring that all departments work together using the same tools and procedures. This is where departments start to coordinate data gathering, shared task lists, and feedback loops. As doctors and other teams get involved, higher complexity is handled and typically the scheduling availability skyrockets.

Before coordination, your patient care faces the following challenges:

- Siloed departments and disjointed patient care
- Difficulty mapping revenue growth to call handling
- Inefficient inter-departmental communication
- Lack of consistent internal feedback loops and QA data

Once coordination is in place, you'll see:

- 90% measurement of issue resolution
- Ability to promise response times to patients
- Option to give doctors SLAs for scheduling accuracy
- Unified tools creating unified teams

- Robust feedback mechanisms across departments
- Comprehensive reporting frameworks aligning operational performance with revenue growth
- Dramatic increase in available appointment slots as complexity is managed effectively

Automate (Test-Runs)

Automation is the High-Intensity Interval Training for your scheduling process. A great patient experience starts with a smooth staff experience. At this level, you're putting your automation through its paces with rigorous test runs. This stage is crucial for liberating staff for meaningful work and enabling real-time data analysis for better decision-making.

Without automation, your practice faces these challenges:

- Siloed patient data and disparate systems
- High costs and inefficiencies from maintaining multiple technologies
- High error rates due to multiple data entries
- Long training times for agents and nurses
- Inconsistent documentation, leading to fragmented data and unsafe patient handling

Once coordination is in place, you'll see:

- 20%-60% reduction in separate technologies used

- Enhanced data integration for better flow and analysis
- Reduced technology-related operating costs
- Advanced call flow analysis & superior QA
- Increased confidence in automated scheduling processes
- Identification and resolution of edge cases before they affect patients
- Ability to fine-tune automation for optimal performance

Consolidation and automation creates efficiency through integration and automated decision support, providing real-time feedback tools and KPI monitoring.

Patient Engagement (conversion)

This is where you're maximizing conversions directly from patients across multiple channels. It's the cross-training stage of your scheduling fitness journey. It's about meeting patients where they are, whenever they need care.

Without an omnichannel approach, you'll struggle with:

- High volume of routine calls leading to inefficiencies
- Limited patient access due to traditional channel constraints
- Lost revenue from no-shows and after-hour scheduling
- Fragmented care experiences

- Inconsistent patient education across different touchpoints
- Less than 10% self-service usage

With omnichannel capabilities focused on conversions, you'll achieve:

- Reduced scheduling call volume by 20-60% through self-service options
- 90% of calendar available online
- Increased after-hours revenue by enabling 24/7 scheduling
- Enhanced care continuity
- Effective patient education across various formats and platforms

Market & Expand (awareness)

This is the scheduling fitness influencer stage, where you're actively pushing awareness of your self-scheduling capabilities.

Without this focused push for awareness, you'll face:

- Low utilization of self-scheduling options despite availability
- Continued high call volumes for routine scheduling
- Missed opportunities for patient acquisition and retention
- Lack of differentiation from competitors in patient experience

Once you're effectively marketing your self-scheduling capabilities, you'll see:

- Dramatic increase in self-scheduling utilization
- Reduced call volumes for routine appointments
- Improved patient acquisition and retention rates
- Recognition as a leader in patient-centric care
- Ability to expand services and patient base due to more efficient scheduling processes

By progressing through these levels, you're not just improving your current scheduling system - you're building a comprehensive self-scheduling powerhouse. By the time you reach the 'Market & Expand' level, your practice will be the scheduling equivalent of a fitness influencer - setting trends, attracting new patients, and running marathons around the competition in terms of scheduling efficiency and patient satisfaction!

CONCLUSION:

Harnessing the Power of Formulas for Self-Scheduling Success

In both personal and professional realms, the application of structured formulas transforms complex challenges into clear, actionable steps.

PATIENT SELF-SCHEDULING SUCCESS =

(% of Calendar Online) x (% of Patients Driven to PSS Page) x (Conversion Rate) x (Accuracy Rate)

It's like the **$E = mc^2$** of healthcare, but with fewer physicists and more satisfied patients, empowered staff, and trusting providers.

Remember, implementing this formula isn't just about improving numbers on a spreadsheet (though that's a nice bonus). It's about creating a healthcare experience so smooth that patients might look forward to scheduling their next appointment. It's about empowering your staff to provide the best care possible. And it's about building trust with providers by ensuring quality care at every step.

So, as you go forth to revolutionize your scheduling system, keep these pearls of wisdom close to your stethoscope:

- Embrace change like it's a long-lost relative (the cool one, not the weird uncle)
- Test, tweak, and optimize like a mad scientist (but with less maniacal laughter)
- Remember that behind every successful booking is a patient who's one step closer to better health, a staff member providing crucial care, and a provider whose trust you're reinforcing

In the grand scheme of things, mastering patient self-scheduling might not cure all diseases or bring about world peace. But it will make your patients happier, your staff less stressed, and your practice more efficient. And in the world of healthcare, that's a prescription for success.

And remember, if anyone asks where you got all this brilliant knowledge, just wink mysteriously and say,

> *I've got a formula for that.*

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