Appointment-Based Adoption Program Guide
Best Friends LA

Contents

Appointment Based Adoption Program Overview

To help reduce the amount of foot traffic there is in our Lifesaving Centers, we will be moving all client adoptions towards an appointment-based flow until further notice. As a reminder, this is a temporary solution to sustain our Lifesaving efforts for the animals in our care while also ensuring the safety of our staff during this time.

To summarize, clients will be able to see our available dogs and cats online as the remote Lifesaving Team is working to spruce up all online profiles with in-home pictures and up to date bios. Afterwards, the client will be directed to fill out an adoption survey for a cat or dog. The survey goes into lifestyle and interests to provide the remote team the information needed to make thoughtful suggestions. Once the client/adopter has reviewed the information and narrowed down their selections, the Lifesaving Team will work schedule them in for an appointment. At the time of the appointment, they will meet their choices and once decided, the Lifesaving Team will process the adoption.

If your center has DocuSign, then I would recommend completing the adoption via telecommunication.

If your center does not have DocuSign, then ensure all necessary contracts, waivers, disclaimers, agreements, etc are signed, and then we will email all medical and behavior documents. We can print the documents at the request of the adopter.

This Program Flow also includes utilizing AirTable, WaitWhile, and ShelterLuv.

SECTION 1: Airtable

Airtable can store information in a spreadsheet that's visually appealing and easy-to-use, but it's also powerful enough to act as a database that we can use for customer-relationship management (CRM), task management, project planning, and tracking progress.

For additional support or tips on how to utilize Airtable, go to https://support.airtable.com/hc/en-us

Terminology Overview
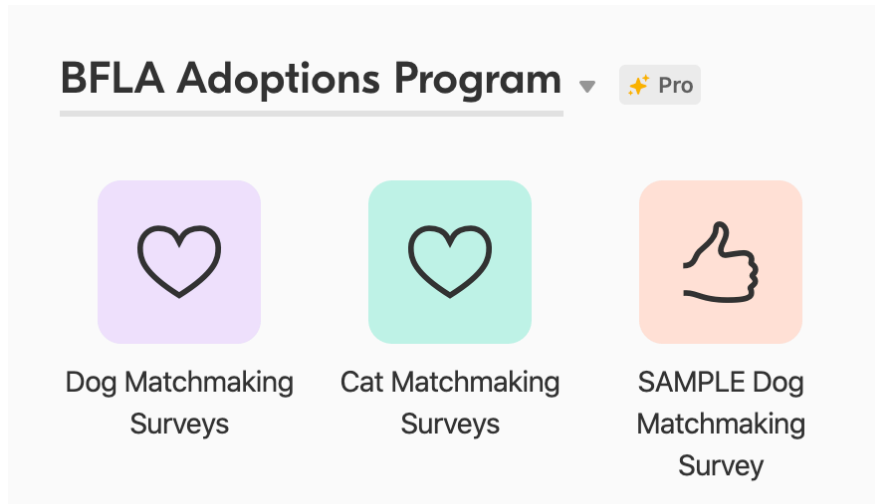
Base

An Airtable base contains all of the information you need for a particular project or collection. Each of the square icons on your homepage is a different base. It's kind of like a workbook in a traditional spreadsheet, and can contain multiple tables of content.

View Overview

In a traditional spreadsheet, every user sees the contents of your sheets in the same way—if you want to hide or freeze columns, for example, everyone else will be forced to see those changes as well.

In Airtable, however, you can create views, which are set, specified ways of looking at your information. What does this mean? Well, for example, if you have a table with many, many fields, you can create a view which will hide certain fields and make the table a little easier to navigate.

The important thing to understand is that **a view is just a different way of looking at the same underlying data**! (This means that if you edit the data in a record while in one view, it will change that data for all views, since all views are looking at the same record.)

Grid View: A grid view, or table view, is the default view type of an Airtable database on the web client. It closely resembles a spreadsheet as the records and fields are organized into rows and columns, respectively.

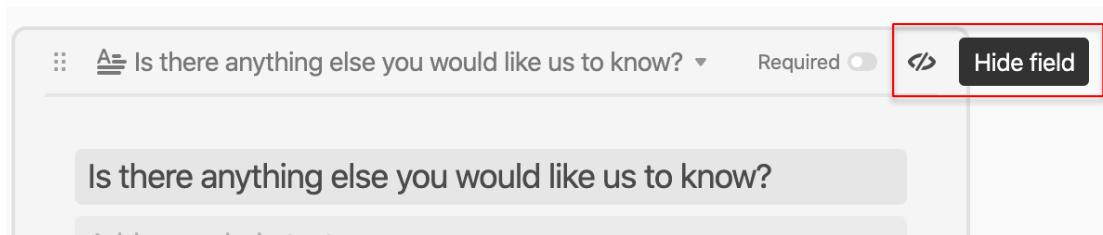**Form View**: This is essentially the adoption survey. Edit, add or delete questions in thie view. You can also add additional fields, like Internal Notes, that are hidden from the client's view if you click the 'hide' feature. (see below)

Manage and see all hidden fields on the left side panel in Form View.
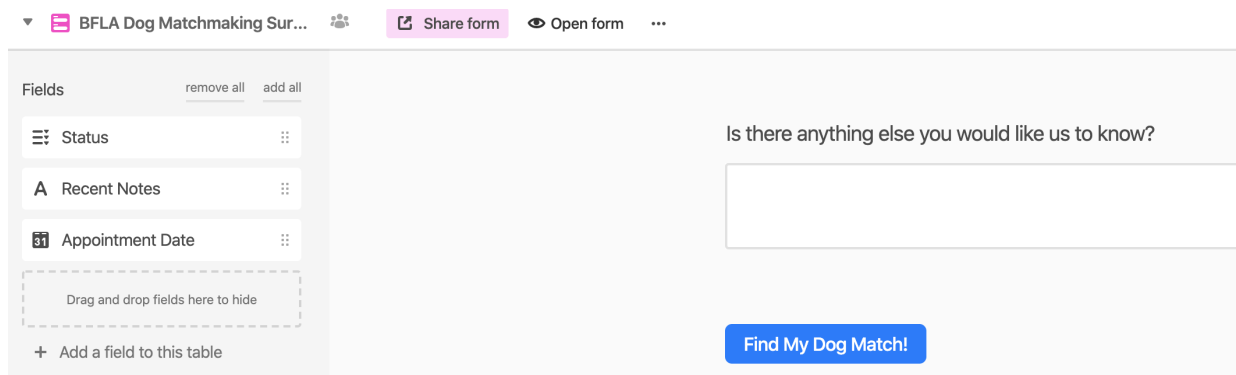
Quick Tips and Shortcuts

Expanded Views allows you to see the client's survey and internal comments full screen.

Filtered Views

'Filtered Views' are a way to filter through the adopter's information and automatically adds them to the appropriate. For instance, if they do not have kids or other pets, they will automatically be added to the "No: Kids or Other Pets" view.

Internal Communications

Utilizing AirTable for our internal communications will be critical for the success and organization of this program. There are 3 fields you can utilize for this: Status, Internal Notes, and Appointment Scheduled (highlighted below).

Utilize these sections to keep each other up to date on the adopter's current status. This allows for communications to easily pass in-between ach specialist.

Types of Statuses + When to Use

Statuses are our way to quickly (and colorfully) identify where the client is at in our adoption process. It will help keep us on track in our communication timeline and ensure our adoption surveys are organized, accurate, and up to date in real time.
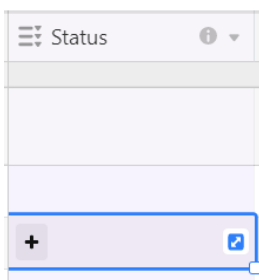
To add a status, click the empty cell and then proceed to click the '+.'

From the drop-down options, select the appropriate status for your client:

1. **Empty Status**: Client has filled out survey + no communication has been made between BFLA + client

2. **Matchmaking Started**: Digital communication and matchmaking between BFLA + client have begun!
3. **Still Looking**: Client has come in for their 1st appointment, but did not find what they were looking for. Still making recommendations on pets
4. **1st Appointment Scheduled**: Client's first appointment is scheduled
5. **2nd Appointment Scheduled**: Client's second appointment is scheduled
6. **Final Appointment Scheduled**: Client's final appointment is scheduled
7. **Ready to Adopt**: Client is going forward with the adoption and waiting to finalize the clerking portion
8. **Unicorn Ask**: Client is looking for a particular dog that we may not see often, but want to keep on our radar in the event we do
9. **Adopted**: Client adopted and this will archive them
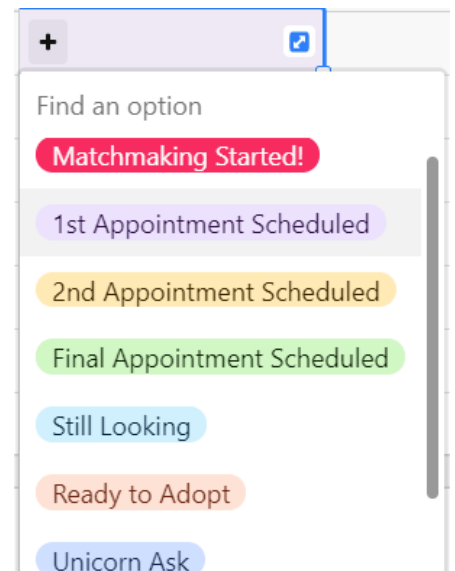
Recent Notes and Comments Sections

This space is not restricted to a certain fill and can be used as a space to make the most recent notes on the client, the pets you feel would be a good addition to their family, etc. Anything that should be quickly highlighted.

On the other hand, we want to ensure we keep all documentation on the adopter's process. To do this, you can add an INTERNAL comment to their information.

Appointment Date Schedule

This is our column to help us keep track on their most up to date appointment so we can make appropriate and timely follow up communications.

Comments

This is the best way to up keep and update the adopter's profile within AirTable. This will have all historical notes/comments, status changed, etc. It is a great snapshot of the timeline from when the adopter submitted their survey up to the point they adopted.

SECTION 3: WaitWhile Bookings System

If your location does not currently have a WaitWhile account, then go to waitwhile.com to get started!

KEEP IN MIND: The name you pick for the location will be the name noted on the URL. Try to pick something like "BFLA Adoptions" which will turn into:

https://app.waitwhile.com/book/bflaadoptions

Bookings Settings

BFLA Adoptions ▾

Settings

CUSTOMIZE

🕐 Waitlist

📅 Bookings

💧 Styling

🏷 Services

▦ Resources

MESSAGES

💬 SMS

✉ Emails

CONNECT

☁ Integrations

👍 Surveys

🎁 Referrals

ACCOUNT

💼 Business Info

👤 Users

🖥 Billing

Go to Settings and you will find several tabs to get your appointment based system set up

You can ignore Waitlist as we are focusing on Bookings.

Bookings will allow you to edit your booking hours, length of appointments, and find your bookings URL for clients.

Stylings focuses on the appearance from your client's perspective.

Services are what we are offering to the client. For instance, Adoption Counseling or Foster Pick Up.

Resources are essentially your staff that will be available to host the appointment.

SMS + Emails under *Messages* allow you to edit the language for appointment reminders, cancellations, and more.

Business Info is where you will control the language for your center's needs.

Users are the staff members that will have access to book appointments for clients. Adding them through this process will prompt an email for them to create an account.

Billing allows you to upgrade your Waitwhile to increase client capacities and more.

Booking Management

This is the home page and where you will go when you are ready to book your client's appointment.

To schedule, click the time and date that your adopter or foster wants to come in, then fill in the appropriate information in the pop up window.

Afterwards, the appointment will be shaded and highlights how many appointments are left in that time slot.

To add another appointment to the same time, click the GREEN button.

To make any edits to the booked appointment, click the BLUE shaded area and a pop up will appear.

	Tue Mar 17, 2020	M
n	9:30 am	
m	10:00 am	
m	10:30 am 2 spot left	
m	11:00 am 2 spot left	
m	11:30 am	

Booking details ··· ✕

🕐 Tue at 10:30 am, 1 hour

👤 Michelle Flitcraft

💬 See chat
(818) 643-3989 • michellef@bestfriends.org

🏷 Adoption Process

▦ LO Lifesaving Outcomes Specialist #1

➕ A Jessabella

👩 Michelle added   ✔ Serve   ✖ No-show   ✏ Edit

Click SERVE when the client has arrived to their appointment

Click NO-SHOW if the client did not show up to their appointment

Click EDIT to make changes to the appointment which include cancelling, rescheduling, or updating client information.

Analytics

Recap your day, week, or month with the Analytics section if you are an Administrator, with charts, graphs, or even broken down by Resource view.

BFLA Adoptions ▾
Analytics   📅 Today ▾   Mar 15 - Mar 15 ▾

Summary

0	1	1	∞
Waitlisted	Bookings	Unique customers	Avg Party size
0	0%	0	0
Served	Serve rate	Avg Wait Time (minutes)	Avg Serve Time (minutes)
0	0%	0	0%
No-shows	No-show rate	Cancellations	Cancellation rate
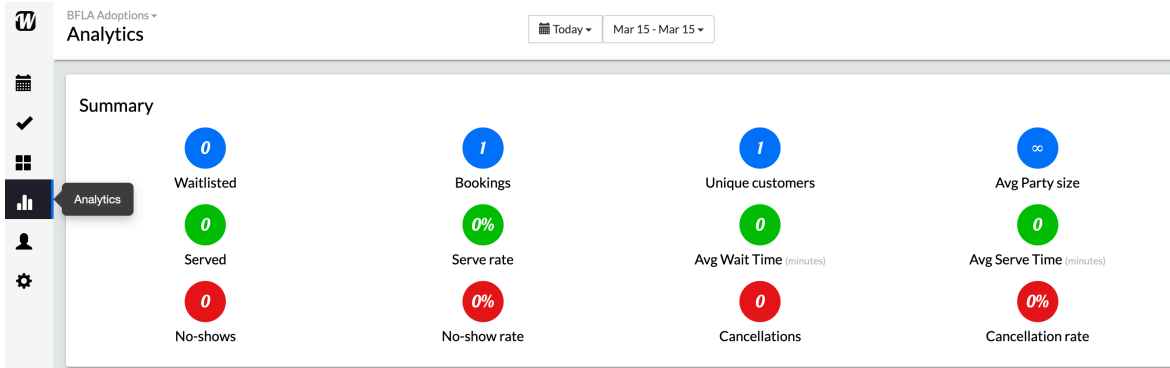
SECTION 4: Client Lens on Adoption Process

Online/Website Information

Clients will be able to view all of our adoptable pets online and have access to the Adoption Surveys directly from our website! Work with your direct Marketing Team contact to add your surveys to the website.

The Remote Teams will be working on ensuring all animals have up to date bios, photos, and/or videos on their profiles. If animals need in-home notes, the remote teams will focus on a foster push to get additional information for the pet's adoption profile.

Adoption Flow: Start to Finish

After browsing the website, the client will fill out a Pet Adoption Survey.

For Best Friends LA Lifesaving Center, the Adoption Survey links are as followed:

For Dog Adoptions // For Cat Adoptions

After filling out the survey, the client is redirected to a page that thanks them for submission and what to expect next (i.e. contact within 24 hours).

The Lifesaving Team will reach out to them to start suggesting some pets or sharing information on interested pets. After narrowing down to a handful, the Lifesaving Team will schedule an appointment for the client to come in and meet the pet and then hopefully adopt or foster!

At this time, we are having the Lifesaving Team schedule the appointments. This allows for most of the adoption process to be done remotely and scheduling an in person visit for showcasing and clerking; reducing the time spent onsite. Clients with appointments already scheduled have the freedom to cancel or reschedule on their own.

Clients will receive text message and email reminders of appointment and have the freedom to cancel or reschedule.

After the client has chosen a pet and becomes an adopter, proceed steps are you normally would.

To reduce as much passing between parties, please have all essential document signing done at the center and email medical and behavior information to the adopter. We can print the documents at the request of the adopter.