Consulting Proposal: Reducing Missed Appointments

Prepared for Lakeshore Family Dental Group | Meridian Field Advisory | November 2026

Client sponsor	Dr. A. Fenwick, Managing Partner	**Proposal #**	MFA-P-0921
Lead consultant	Rosa Whitfield	**Valid until**	Dec 15, 2026

Executive summary

Lakeshore's four practices lose roughly 9% of booked hygiene appointments to no-shows and late cancellations. We propose a 12-week, three-phase engagement to diagnose the causes, redesign scheduling and reminder workflows, and pilot the changes at two locations, with a target of cutting missed appointments by a third.

Situation & objectives

- Current state: reminders sent manually; no standard confirmation call; rebooking at checkout inconsistent.
- Objective 1: reduce hygiene no-show + late-cancel rate from ~9% to 6% or lower at pilot sites.
- Objective 2: standardize scheduling and confirmation across all four practices.
- Objective 3: give managers a weekly dashboard of fill rate and missed visits.

Approach

Phase	Key activities	Deliverables
1. Diagnose	Stakeholder interviews; 12 months of schedule data; observe front desk at each site	Findings memo with root causes
2. Design	Co-design scheduling template, reminder cadence, confirmation scripts; define KPIs	Playbook, scripts, KPI definitions
3. Pilot & handover	Run at 2 sites; weekly reviews; adjust; train managers	Pilot results, rollout plan, final report

Team

- Rosa Whitfield, lead consultant - healthcare operations, 14 years.
- Devin Sato, analyst - scheduling data and dashboards.

Timeline

Weeks	Milestone
1	Kickoff and data request
3	Findings memo and steering review
6	Playbook approved
7-12	Pilot at two sites, weekly check-ins
12	Final report and rollout plan

Fees

SAMPLE

Preview only - the download contains the editable, unwatermarked files.