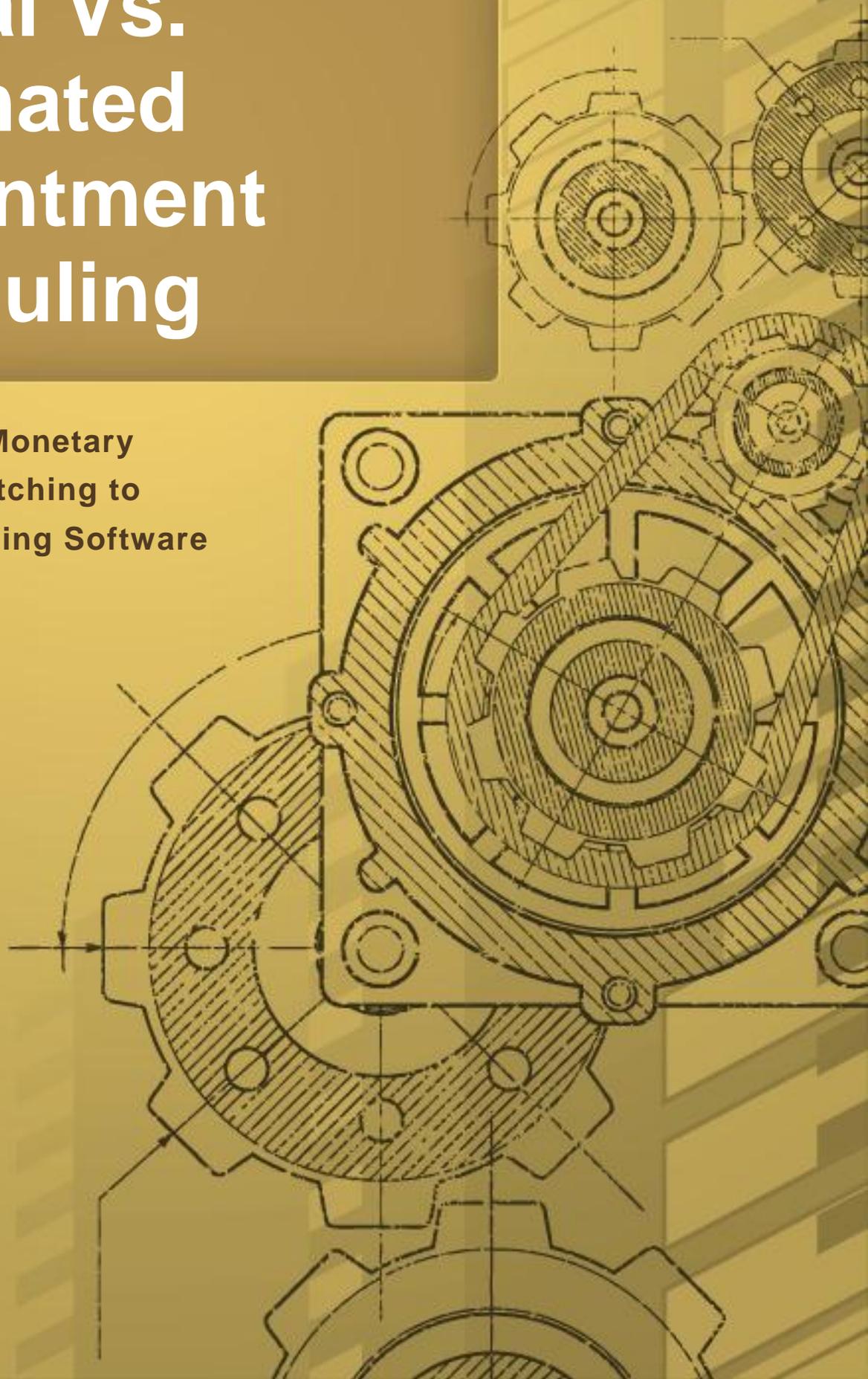


Manual Vs. Automated Appointment Scheduling

**The Time and Monetary
Savings of Switching to
Online Scheduling Software**



Contents

Introduction

Scheduling and managing appointments and reservations is an important component in the operations of all-sized organizations, from Fortune 500 companies and enterprise-level businesses, right down to service-based small businesses. Online scheduling software has simplified and automated this process for all-sized organizations.

The “Pain” of Scheduling Appointments in the Traditional Way

The appointment process for many organizations is not as simple as it seems. It’s an oftentimes burdensome task that can require significant time and staff resources to properly manage. It can also have a negative impact on overall operations and restrain an organization from running at its fullest potential.

Why Online Scheduling

Online scheduling software has become the most effective and efficient means to manage appointments and reservations, as well as individuals’ contact information. Not only does it provide advanced functionality to streamline the process and make it easy to book online, it’s also highly accessible, helps organizations stay connected with their customers, clients, students and patients, and can result in significant time and monetary savings.

What to Look for in Scheduling Software

Choosing the right scheduling software provider is imperative in improving the booking process. Features, professional services, security, cost and customer support can vary among providers, which is why a thorough analysis of both specific needs and system functionality is important before selecting a service.

Introduction

The scheduling of appointments and reservations is an important task in the operations of all-sized organizations, from Fortune 500 companies and enterprise corporations, right down to service-based small businesses. While the manner of appointment-scheduling has evolved through the years—from taking appointments over the phone and recording them in a paper appointment book to utilizing an electronic calendar such as those offered by Google or Microsoft Outlook—the task itself remains tedious and time-consuming for organizations that continue to rely on these outdated and inefficient methods.

[Online scheduling](#) technology has simplified and automated the processes for an increasingly growing number of these organizations. Affordable, easily accessible and generally easy to use, these applications have completely changed the way organizations schedule and manage their appointments and reservations, as well as the manner in which their customers, clients, students and patients book their services.

This article will detail the benefits of moving away from a paper appointment book or Google calendar and into a proven online scheduling software application.

*Online scheduling applications
...affordable, easily accessible
and generally easy to use,
these applications have
completely changed the way
organizations schedule
appointments.*

The “Pain” of Scheduling Appointments in the Traditional Way

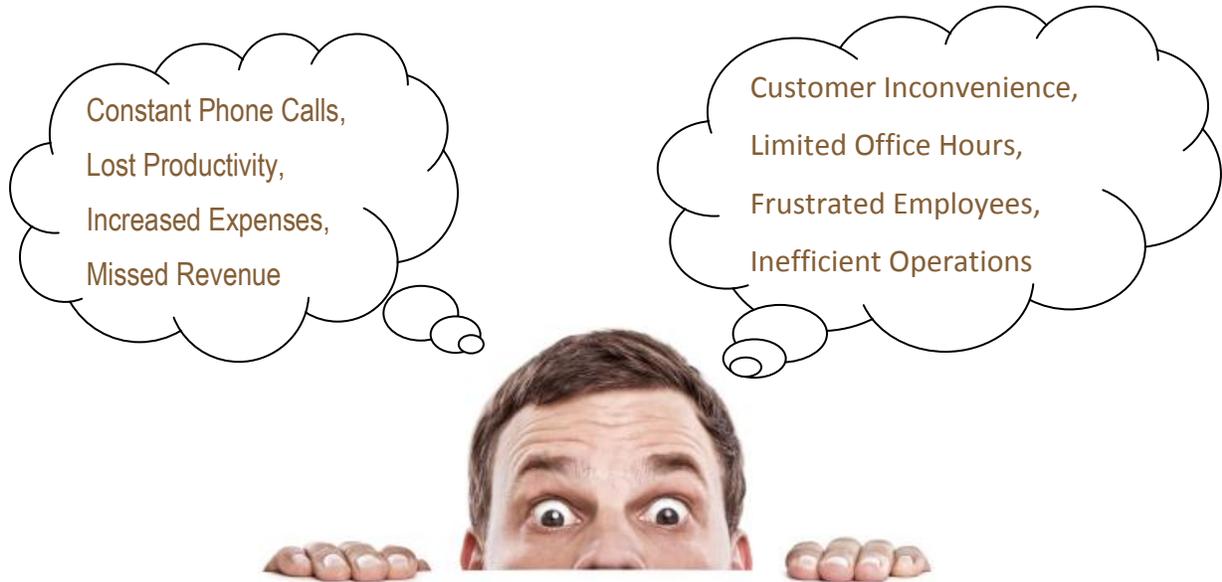
On the surface, the process of scheduling appointments and managing individual contact information seems simple enough. However, a more in-depth analysis of an organization’s scheduling processes will reveal just how ineffective and costly this task can be. It is, therefore, in an organization’s best interest to examine the way it currently manages its scheduling and take into account certain considerations affected by the scheduling process. These considerations include:



Staff resources needed for managing appointments

Scheduling appointments and reservations in the traditional manner requires manpower, whether it's the receptionist answering the phone, an administrator managing a paper appointment schedule, or a support staffer making reminder phone calls. This manual management of appointments and reservations has the potential to drive up operating costs, such as overtime pay or the need to bring on an additional employee to either manage the booking process or assist in tasks other employees are unable to complete because most of their attention is directed at the scheduling process. A quick breakdown of daily staff responsibilities and the amount of time devoted to each can reveal the level of employee focus on managing appointments and reservations.

The following scenario can occur in any-sized organization: A business, overwhelmed by constant phone calls from customers looking to book their appointments, must divvy up staff time to answering these calls and manually record and manage the information. These individuals have their own responsibilities, but the demand to properly manage of these appointments takes immediate precedent over other tasks, which, ultimately, now are not receiving the attention needed. Overall productivity suffers, and the business is forced to bring in another employee to either primarily manage the appointment-scheduling process or assist in other areas that have been neglected. This has an instant impact on the business' bottom line, as this increased payroll has inflated overall operating costs.



Time needed for managing appointments

The scheduling process at many organizations may take only a few minutes to complete, which may not seem significant in the overall scheme of things. But multiply that by the number of daily appointments or reservations—which can total in the hundreds or thousands for larger organizations—and this quick task morphs into a time-consuming dilemma for supervisors, managers and staff. This time requirement may force organizations to spend less time on more pressing task or inflate their operating costs by requiring additional employees or overtime pay.

Take, for example, a busy college advising office staffed by only a few advisors. These individuals must not only meet with students and manage their information, they must also answer the phone, check and respond to e-mail, return voice messages or book students in person. On average, this many take three to four minutes per appointment. Multiple that by hundreds or thousands of students, and you quickly realize the staff resources required for this tedious task. These are resources that could have been spend more productively meeting with students, developing advising programs, or other administrative tasks.

Limited hours of operation

Unless an organization is open and staffed 24 hours a day, there is a limited window for individuals to schedule their appointments and reservations. This not only presents a challenge for people scheduling—as they may not have the means to contact the organizations during normal operating hours—it also equates to missed sales when they are closed for business.

Unless an organization is open and staffed 24 hours a day, there is a limited window for individuals to schedule their appointments and reservations.

A great example of an organization affected by limited hours of operation is a government agency or department that schedules services for citizens. Even more so than private organizations and businesses, these facilities typically have limited operating hours, with some offices only open a few hours each day. This can be challenging to individuals who simply do have time to call their appointments in when the office is open. Additionally, those that can oftentimes encounter long waiting periods to speak with an administrator, as office staff are bombarded with calls during this time. This creates an inconvenience for citizens and a burdensome task for office staff.

Inconvenience for customers

Not offering an online alternative to picking up the phone and calling in an appointment is an inconvenience to customers in today's Internet-connected society. Customers, clients, students and patients not only desire the ability to conduct transactions—like booking appointments or reservations—online, they also expect it. In some instances, they may look elsewhere for a competing organization that does offer it.

Let's look at a chain of fitness centers that routinely book a variety of services. But this can be challenging for members, as the centers have limited hours when appointments are booked. To make matters worse, some instructors book their own appointments, instead of having them scheduled through a front-desk employee or administrator. Most of their membership is connected to the Internet 24 hours a day through laptops and smartphones. And they want the ability to book their gym services online, instead of having to call them in. For many, this lack of an online scheduling alternative and the hassles that come with it are enough for them to consider another fitness facility to join.

Why Online Scheduling

Although other alternatives exist for managing the appointment-booking process, [online scheduling](#) software is without doubt the most efficient and affordable option for all-sized organizations, regardless of the type of service they schedule.



Advanced Functionality

Features found in online scheduling software applications that can completely automate, streamline and improve the appointment- and reservation-booking process are simply unavailable in the traditional scheduling process. These include:

Online self-scheduling, whereby individuals can book their own appointments and reservations at their own convenience, 24 hours a day

By giving people the power to book their own appointments and reservations online, organizations and their staff can free up a tremendous amount of time that would otherwise have been spent answering the phone, responding to e-mails and voice messages, and manually managing a paper appointment book or electronic calendar.



One counseling group saw an immediate change in the way its clients scheduled their appointments: over 90 percent of them now book online.

Online self-scheduling is one feature that individuals quickly begin using. For example, one counseling group saw an immediate change in the way its clients scheduled their appointments: over 90 percent of them now book online.

Automated e-mail and text message reminders

Studies have shown that reminders of any kind can significantly reduce the number of "no-shows", the bane of many organizations. But unless this process is automated, a staff member must spend time contacting scheduled individuals, either by phone, e-mail, text message or other form of communication. Depending on the number of scheduled appointments or reservations, this task could have a significant effect on overall productivity. A reminder sent automatically through an online scheduling system requires no additional staff time and can reduce the no-show rate by over 50 percent. It also can reduce the number of phone calls from scheduled individuals checking to see when their next appointments or reservations are booked for.

Sending scheduled individual appointment reminders can go a long way in keeping appointment and reservation slots full. Just consider these real-life examples:

- Educational counselors at a high school district significantly reduced the number of same-day and last-minute cancellations, as e-mail reminders are sent to both parents and students.
- A nurse practitioner group has virtually eliminated “no-shows” through automated reminders.

Record-keeping and reporting capabilities

Appointment and reservation data and accompanying details about a scheduled individual or specific service is important to many organizations, who use the information in reports and analysis. An online scheduling system eliminates the need to manage this information in separate files, folders, spreadsheets and other documents, as it's securely and safely stored and maintained right in the system. In some instances, the scheduling system may already have standardized reporting options, making it easy to quickly compile a report, instead of manually collecting and disseminating stats and figures.

The types of reporting options can vary, but common reporting data includes details on the appointments/reservations, customers, statistics and stats. Some organizations have a need for weekly reports, while others require monthly or annual update. Generally, scheduling systems

allow users to specific the timeline for pulling the data, which eliminates the need to manually sort through it in a database or spreadsheet.

*A distributor unjustly charged a “hold” fee from a carrier for keeping a truck at a dock bay for longer than an agreed-upon time can now challenge this charge, as the online scheduling system utilized by the facility can instantly show the time the vehicle arrived and when it departed. This can translate into a **savings of \$150-\$300 per incident.***

Accurate records can come in handy, especially when circumstances demand immediate access to them. For example, distributor unjustly charged a “hold” fee from a carrier for keeping a truck at a dock bay for longer than an agreed-upon time can now challenge this

charge, as the online scheduling system utilized by the facility can instantly show the time the vehicle arrived and when it departed. This can translate into a savings of \$150-\$300 per incident.

E-marketing

As customer, client, patient and student e-mails are a key component to any successful e-marketing campaign, an online scheduling software program can be the easiest and most convenient way to manage e-mail addresses and, in some instances, even instantly sync with e-marketing service providers. Since returning individuals will update their e-mail addresses when they return to book a new appointment or reservation, a list created through an online scheduling system is typically more updated than one managed manually in a spreadsheet or file. Maintaining these e-mail addresses in a scheduling program also frees up staff time that would otherwise be devoted to managing a customer e-mail list.

Additionally, an assortment of service-based organizations—from spas and salons to fitness centers and photography studios—have taken their e-marketing to the next level by adding a “Book Now” button right in their newsletter or e-mail message. By including their scheduler link right next to discounts, promotions, specials and coupons, they’re able to generate even more appointment and reservation sales, as their customers are more likely to schedule services if they can do it right then and there, instead of having to navigate away from the newsletter.

Online payment options

As many services have a cost associated with them, some organizations prefer to have individuals pay for their services at the same time they schedule them. More so today than in the past, individuals typically are comfortable paying with a credit card online and are willing to provide this information through a secure and safe scheduling system. This functionality can be beneficial to organizations in several ways. First (and most importantly), an individual who pays for a



service when he or she schedules it is less likely to miss the appointment time, thereby further reducing the “no-show” rate and ensuring that appointment slots remain full. Secondly, an automated online payment and processing feature can simplify the accounting process and reduce the number of manual steps needed to process and record payments.

Additional features

Keeping pace with technological trends and customer needs, online scheduling systems have developed additional features to complement their primary system functionality. These include:

- “Plug-ins”, syncs and integrations with commonly-used software applications, such as electronic calendars, accounting programs and e-marketing services.
- Mobile web apps that provide a smoother interface on smartphones.
- Multiple appointments per time slot, an important feature for booking groups and activities.

An Online Society

According to Internet World Statistics, there are 2,095,006,005 Internet users worldwide, a 480.4 percent increase since 2000. That’s a significant percentage of the world’s population. These individuals are not just checking e-mail or viewing family photos on a social media site. They’re also conducting daily transactions such as booking appointments and reservations. As this number continues to grow, organizations must adapt to this expanding trend or face the reality of losing customers, clients, patients and students—and the sales that come with them—to competitors that do offer online appointment-scheduling.



All organizations that wish to remain successful must conduct transactions online, and this includes appointment-scheduling.

Organizations that switch over to an online scheduling system in place of a manual process often see an immediate switch from form of scheduling to the other. One medical group reports an almost 100-percent online scheduling rate among patients 40-years of age and younger, while a tour group says over 90 percent of its customers book their reservations online.

In short: Both current and prospective customers, clients, patients and students are online, and organizations need to be as well.



*One medical group reports an almost **100% online scheduling rate** among patients*

Staying Connected with Customers, Clients, Patients and Students

The automation created by an online scheduling software system goes beyond a streamlined and improved booking procedure. It can also help keep organizations better “connected” with their customers, clients, patients and students. As these individuals schedule their appointments and reservations online, the contact information they provide—e-mail, phone numbers, addresses, etc.—will be securely maintained in the system and allow for easy accessibility to the organization. This equates into more simplified communication with them, such as through e-marketing or simply messaging them occasionally to maintain the lines of communications. It’s a great way to build a loyal customer base.

Money Savings

Automating any type of process in general can instantly equate into monetary savings. This is especially true for organizations that implement an online scheduling system, as it lifts the burden of assigning staff members to manage this tedious task. The organization, in turn, can reduce employee pay in the form of overtime or hiring an individual to either manage the appointment-booking process or assist in other areas impacted by the strain of the scheduling process. Additionally, it can also replace call centers and professional receptionist services used by larger organizations who book a considerable number of appointments and reservations daily.

Examples of financial savings at organizations that utilize an online scheduling system:

A large manufacturer saves \$2,000 daily at its many facilities by better managing the schedules of dock personnel based on specific delivery times.

A distribution facility saves \$500 to \$1,000 in weekly overtime pay, as it can better schedule its dock staff by knowing exactly when inbound shipments will arrive.

A medical group that saves \$40 per patient per visit for individuals that schedule their appointments online.

A golf instruction service that saves hundreds of dollars per week, as all students now book their lesson times online.

A massage business and its branch locations save an average of \$2 to \$5 per transaction if clients book online instead of through its answering service.

In analyzing an online scheduling system in these terms, an organization's return on investment (ROI) can be significant. For example, *an organization requiring a receptionist to manage its appointments in the traditional manner will need to add an average of \$28,000 annually to its payroll* (based on the average receptionist salary as reported by Indeed.com). This position and the accompanying salary will no longer be required by implementing an online appointment-scheduling system.

Another positive attribute of online scheduling software systems that can increase monetary savings is automated e-mail and text message functionality, as detailed above. Missed appointments and reservations mean loss revenue, as other paying individuals could have selected those open times. These reminders can significantly reduce the "no-show" rate, helping ensure that individuals keep their scheduled times.

Time Savings

By completely automating the scheduling process from start to finish, an online appointment-scheduling system can dramatically reduce the amount of time needed to manage appointments and reservations. This equates to less staff time on the phone or responding to voice messages and e-mails from individuals looking to book or change their scheduled times. For organizations that routinely schedule hundreds or thousands of appointment each week, the impact of an online scheduling system is usually immediate.

For instance, a counseling group that began using online scheduling software immediately experienced a 75-percent drop in phone calls, which frees up valuable staff time. Another example is a tanning company office that was unable to answer or respond to all 300 daily phone calls and voice messages, resulting in lost business; it now fields only a handful of phone calls, as clients now go online to book their sessions.

A college testing center experienced a 75% reduction in student phone calls

Other examples include:

- A college testing center experienced a 75-percent reduction in student phone calls.
- A medical office saving an average of over 10 hours per week by reducing the number of phoned-in appointments and the time needed to make reminder phone calls.
- A medical center saving eight to 10 hours of staff time per week.

Additionally, organizations that conduct “deal-of-the-day” campaigns, such as those offered by Groupon and LivingSocial, have especially benefited from an online scheduler, as most simply cannot keep up with the tremendous volume of phone calls and e-mails generated by these popular programs. For some, the success of their campaigns is directly tied to the scheduling system used to book these new customers. One fitness group reported estimated its savings at thousands of dollars, as a part-time employee would have been needed to field phone calls during its deal campaign.

Accessibility

Online scheduling software is accessible in the same manner as any Web site, social media page or e-mail program. All that’s required is an Internet connection, something almost everyone has these days, whether it’s on a desktop computer, a laptop or a smartphone. This characteristic not only provides scheduling individuals the ability to view services and availability and book their times, it also enables administrators and staff to access their schedules when away from their home or office. This contrasts with the outdated, “boxed” software applications that were typically installed and accessible only on a single desktop computer or network.

The benefits of utilizing an Internet-accessible software program can be far-reaching. Take, for example, a large driving school with many instructors, who previously had to return to their main office between lessons to view their upcoming appointments. These individuals can now instantly access their schedules online, saving time and gasoline. In one instance, an organization reported a daily savings of two hours of travel time per instructor and an average annual savings of \$650 in gas per instructor.

What to Look for in Scheduling Software

Considering the pivotal role of appointment- and reservation-scheduling in organizations of all sizes, it's important to conduct adequate research into not only the specific booking needs for customers and staff, but also a thorough evaluation of the many [online scheduling](#) software providers and what's included with their service. And like all Software as a Service (SaaS) products, there are several areas that organizations should consider before selecting them.

Features and functionality

These are the cornerstone of an effective online scheduling system, so it's important for an organization to have a general feel of what it's looking to accomplish and the tasks it hopes to streamline and automate ahead of time. While some organizations benefit solely from standard functionality found in most online schedulers—such as online self-scheduling and automated e-mail and text message reminders—others require additional features to improve their booking processes, such as the ones mentioned earlier. Some requirements may not even be apparent at first, especially for organizations that either previously used a traditional method of booking appointments or had no booking system in place at all. A free trial or demo can be extremely beneficial in learning what some of these unknown requirements are, as the organization will be able to test out the system and discover all of the features and functionality it has to offer.



Professional services

This characteristic can really set an online scheduling system from other providers, especially if the organization is looking to expand beyond the basic functionality of the scheduling system. Examples of this include integrations and Web services into existing systems and networks,



customized graphic user interface (GUI) development, and dedicated business and support contacts. Most scheduling software providers are unable to meet these demands, which is why this can be an extremely important consideration for larger organizations that require a highly configurable and scalable system. In these circumstances, it's often best to contact the service provider and speak with them on what their capabilities are and how/if they can meet specific requests.

Security

This is undoubtedly the most important consideration, given the transfer and flow of private information such as names, e-mail addresses, phone numbers and mailing addresses across the Internet. That said, it's in the best interest of the organization to check the security credentials of the SaaS provider it's considering before signing on the dotted line. Areas that should receive attention include:

- The provider's standard security practices.
- Its server database, data storage and back-up procedures.
- Procedures related to failover and federal regulations.

Most reputable organizations will gladly share with prospective organization clients the safety processes that have in place; it's up to the organization and its representatives to inquire on these during the research process.

Organizations should also be wary of services that do not provide an address or are based in foreign country, as these online scheduling systems may not have the same security standards as domestic providers. Should something go awry, the organization using the scheduling software may have little or no recourse should something go awry.

Cost

As with most SaaS programs, the cost of online scheduling software can vary greatly, from services that are entirely free to more robust applications that charge a monthly fee. Most free or low-cost applications simply do not offer the functionality and services found in higher-end applications, which is certainly a consideration, depending on the specific needs of the organization. This is especially true for Fortune 500, enterprise-level companies, corporations and large and medium-sized business, who oftentimes require additional services, such as the ones mentioned above. As the old cliché states, “You get what you pay for.” This is certainly the case when it comes to online scheduling software.

As a general rule, most SaaS applications are generally affordable and fit the budgets of all-sized organizations. Many have implemented a “pay-as-you-go” payment approach, with no long-term contracts. Some even offer a discount—such as a month or two of free service—if service is paid for upfront for the year.

Support

Historically, many software developers did not offer ample customer support for their products, relying on FAQs on their Web sites, instruction manuals, paid phone support and the hope that the IT department at the organization purchasing the software (if one even existed) would have the experience and knowledge to install, learn, manage and maintain the new software. Obviously, this is rarely the case in most organization environments.

The advent of SaaS programs changed that, as all-sized organizations now received more ample customer and technical service with their chosen service providers. However, the level of customer and technical service can vary greatly among providers. Some staff their customer service departments with live phone support, while others instruct their clients to contact them via e-mail, which they respond to within a certain amount of time.

While a minimal amount of customer support may be acceptable for some SaaS applications, it's usually insufficient for online scheduling software, given its importance in the overall operations of an organization. Whether it's a system glitch or the need to speak to a live person to answer a

While a minimal amount of customer support may be acceptable for some SaaS applications, it's usually insufficient for online scheduling software...having the ability to quickly communicate with your scheduling software provider is critical.

question or concern, having the ability to quickly communicate with your scheduling software provider is critical. When researching organizations, be sure to check on the type live support they provide (both phone and e-mail are ideal).

Another characteristic of a good online scheduling software company is system training. Just as traditional, "boxed" software found in electronics stores and retail outlets can keep customers in the dark when they first attempt to use it, so too can Web-based scheduling software application providers that don't come accompanied with proper training for their clients. Reputable online scheduling software services provide their clients with training when they first sign on, ensuring that their scheduler is configured to meet their specific needs, the user is familiarized with the functionality and features of the system, and that questions they organization user may have are adequately answered.

Additionally, a reputable SaaS provider will also conduct routine upgrades and updates to the system to ensure the service is top-rate. These typically are automatic and require no action on the part of the organization; when a system user logs in after the update or upgrade, the changes are instantly reflected.

Dependability and credibility

As with other SaaS programs, there are numerous online scheduling software services on the market today. Many have sprung up overnight, with many lacking the experience, dependability and credibility needed to tackle the daunting scheduling processes of most organizations. It is, therefore, vital to carefully research each online scheduling provider being considered before making that all-important decision to select them.

Although appointment-scheduling and reservation-booking may seem like a universal task, the way an organization views and manages this process varies among the hundreds of industries that routinely book services and individuals. It's important to consider real-life examples of how scheduling software works within a specific industry, which is why organization representatives should ask the scheduling service being considered for these. If available, ask for references within a specific industry and inquire on the dependability of the software, how easy it is to use, how their staff and customers like it, how it's improved their operations, any issues or "red flags" you should be aware of, and other questions you may have that might impact your decision to select the service.

Another indicator is the length of time the service has been in business. 'Fly-by-night' operations typically don't last long, and being in business for an extended period of time is a good indication that a service provider is reputable and is more likely to stand the test of time.

...being in business for an extended period of time is a good indication that a service provider is reputable and is more likely to stand the test of time.

Conclusion

Technological advancements have caught up with most industries and the tasks they conduct. The scheduling and management of appointments and reservations is no exception. Proven online scheduling software systems are now readily available to all-sized organizations and for all scheduling needs, regardless of the scope of operations, the number of staff members, and their operating budgets. This technology can transform this oftentimes daunting process and enable them to run more efficiently, effectively and profitably.

**To learn more about online scheduling software
and how it can improve your booking processes, visit
www.appointment-plus.com.**

© Appointment-Plus, 2012