Online Scheduling
Buyers Guide™

Your Top 10 Considerations When Choosing an Online Scheduler

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Today's Technology Forecast: Online Scheduling

There's no denying it. Online appointment scheduling is increasing in popularity. At this point, most of us have made some type of appointment online, whether it’s a haircut, a tennis reservation, or an oil change. And while the user experience can vary widely from site to site, the results are conclusive: people like it!

But even though online scheduling is getting more and more attention, it's not yet universal. Only a very small percentage of businesses and institutions actually offer it. For example, a recent study showed that while 42 percent of patients surveyed would have liked to schedule their medical appointments online, only 17 percent were able to do so. Even so, self-service solutions like online scheduling are becoming more commonplace. So, chances are, you've given some thought to whether one is right for your organization.

But before you get too far down the road of implementing an online scheduler, there are some critical factors to consider. Online appointment scheduling looks simple, but it can be a complex process. Also, it's important to keep in mind that making sure your staff and customers are ready for the technology is just as important as the system itself.
What You Should Know About This Guide

The Online Scheduling Buyers Guide™ is designed to help you navigate the essential considerations to think about as you continue down your path toward deciding upon an online scheduling solution. It provides both system and business-related guidance.

Whether you’re a sole practitioner, a manager in a Fortune 500 company, or the department head at a university, taking the time to really understand what’s involved in selecting the right scheduler will help ensure your experience with online scheduling is a positive one.

Top 10 Things to Consider When Choosing an Online Scheduler

1. Know Your Why Before You Buy
2. Online Scheduling Is Not for Everyone
3. Be Sure to Prepare for Project Management
4. A Change Management Process is Critical
5. Not all Online Schedulers are Built Alike
6. Research the Company Behind the Software
7. Consider the Vendor’s Support Offering
8. Will Your Data Be Secure? How Secure?
9. Will Implementation Be Quick and Optimal?
10. Don’t Be Forced into a Lengthy Contract
It's Important to Know Your Why Before You Buy

First, ask yourself this: Why is your organization implementing online scheduling?

It's important to understand the business drivers behind why you're considering an online scheduler. Understanding the reasons behind the decision will help determine how you measure whether the solution is successful.

Not all organizations have the same motivation for moving to online scheduling. Some do so because their competitors offer it. It's a valid reason. In some industries, it's reaching the point where customers are making buying decisions based solely upon a company's ability to let them book online.

Other businesses and institutions are more interested in the potential time savings — and, in some instances, cost savings — that could result from the use of online scheduling. Indeed, the stories of companies that have had their operations completely transformed by online scheduling are too numerous to list here.

Another important reason companies move to online booking is quite simple: their customers are asking for it. A recent report shows that 51% of American consumers prefer to shop online, from clothing to travel planning. So, it makes sense that they'd also want to book their appointments via the web as well.

Before you get too far along in your decision-making process, take time to ensure you have a grasp on why you want to adopt online scheduling. It will make all the difference in the implementation phase.
Online Scheduling Is Not for Everyone

Next, consider this: Will online scheduling work for your organization?

Online appointment scheduling is a transformative concept. It provides businesses with an innovative method of streamlining their appointment booking processes. It also offers a convenient way for customers to make, change, and cancel appointments — anytime they like, 24 hours a day (a 2016 report showed that 51 percent of consumers wanted businesses to be available 24/7). It's a win-win for all parties.

So, why aren't all service-related organizations implementing it?

That's a good question. The answer is that scheduling is inherently complex. No two businesses schedule exactly the same way. Designing a software system that perfectly accommodates every scheduling scenario is impossible. This means that, in some cases, an organization would have to significantly alter their core processes in order to successfully utilize online scheduling.

While many companies can make these changes without much pain, others cannot. Often, the way in which an organization schedules appointments is core to their business model.

Making modifications to their appointment processes would require huge organizational changes. Many businesses consider online scheduling to be a high-priority solution, and therefore they'll make the necessary alterations. To others, it's simply not feasible.

So, when researching options, take the time to clearly understand how a scheduler will impact your current booking process.
Be Sure to Prepare for Project Management

Are you ready to look at online scheduling implementation as a project?

There are many applications that work immediately upon download. Consumer apps, like Pandora, fall into this category. You register, log in, and can be listening to Santana within moments.

Unfortunately, online scheduling is not like that.

It takes thought, analysis, and a concerted effort to ensure that your online scheduler is implemented properly. If you don’t take the time to optimize your configuration, you could face unnecessary problems down the line. Because quality schedulers have so many preference settings, it’s critical that you talk with an expert on the scheduling software company’s Sales or Support team. They can help configure your account, train you, and apprise your team of all the preference options available.

In addition to setting up your system properly, you also need to be ready to deal with process changes. For many organizations, the appointment booking process is a key component of their business models. Asking staff — and customers — to change their behaviors is never something to be taken lightly.

So, be sure you are approaching your implementation as a project. Create a detailed project plan with specific tasks, assignments, and due dates. Excel or another spreadsheet program will work fine for this purpose, but even if it’s just written down, that’s okay, too. The key is to have a plan.
A Change Management Process is Critical

Are you prepared for some resistance?

It's well-documented that humans aren't too keen on change. According to change advisor and author Rick Maurer, "80 percent of the chief information officers said that resistance — not a lack of technical skills or resources — was the main reason why technology projects failed."

That's because if something is working for us, even only partially, we generally prefer to keep it as is. We're actually designed this way; the human brain is always on the lookout for patterns and shortcuts it can use to conserve energy. So, it makes perfect sense that introducing a new software system or process is going to be received with some resistance from your staff, and maybe even your clients.

Often, even if we know that change is inevitable, we still resist it. The good news is that there are ways to ease the pain of your staff and customers. Planning for resistance and utilizing some key methods to address it will help ensure a smooth switchover to online scheduling. A time-tested method for overcoming resistance to change is to get people involved in the process. Make sure you seek your team's opinions on what features are critical, and include them in analyzing the options. Assign staff project tasks too, if it makes sense to do so.

Finally, make sure your teams are well-trained in advance of the system going live, and that your clients are apprised of the changes pre-launch via communications and resource articles. You'll definitely need refresher training for both as you get closer to cutting over. But allowing individuals sufficient time to prepare for the change will undoubtedly ease their minds.
Not All Online Schedulers Are Built Alike

It’s a common misconception that all schedulers are created equally. They’re not.

There’s no shortage of online appointment scheduling systems on the market. That’s a good thing, because there are a lot of options to choose from. It’s also a bad thing, because...there are a lot of options to choose from.

Trying to make the right decision about a scheduling solution can be daunting.

In all seriousness, trying to make the right decision about a solution can be daunting. If you don’t select the right system, it could severely hurt your organization. From the inability to reach someone when you have a question, to the lack of sufficient security, there are countless operational problems that might occur.

Do Your Due Diligence

- Can I talk to a live person if I have a question?
- Do you have a hot backup site?
- Are you SSAE16 SOC 2 Type 2 certified?
- How many employees do you have?
- Can your system scale as we grow?

The key to minimizing your risk is to ask the right questions. When doing your due diligence, be sure you get answers to the following:

When making the difficult choice of which scheduler to go with, be sure you get acceptable answers to these critical questions.
Research the Company Behind the Software

Here’s why it’s important to learn more about the business that’s producing the scheduling application you’re considering.

Behind every software system is a software company. In today’s world, that software company could be a Fortune 500 firm, or it could be a kid in a garage. That’s the magic of the internet. A tiny little company can create an online presence and compete with organizations that are much bigger. While that’s great for leveling the playing field, it’s not so great when you’re trying to select the right software partner for your mission-critical processes.

There’s nothing wrong with small software companies — even Microsoft and Apple had humble beginnings. As a matter of fact, small software firms can be innovation leaders.

The problem with small companies is that they go out of business at a higher rate than larger companies. They also aren’t usually able to provide the level of service and scalability that some clients need. And, when it comes to trying to serve large enterprises, forget it. One large client can put a small company out of business. It happens all the time.

So, when you're considering an online scheduling provider, look behind the curtain. Don’t just make a decision based on a flashy website and flowery language. Find out as much as you can about the company. You’ll be glad you did.
Consider the Vendor’s Support Offering

Don’t underestimate the importance of support when considering an online scheduling vendor.

When most businesses research an online scheduler, the natural tendency is to focus on features and functionality. That makes sense, because if the system can’t accommodate your needs, it’s probably not a good fit for your organization.

However, if you don’t factor in what kind of support comes along with the system, you may be setting up your team for a lot of frustration. Sure, motivated individuals can pick their way through a knowledge base and figure things out for themselves. But for the rest of us, having someone who can answer questions directly can be a huge time — and frustration — saver.

Unfortunately, the trend in software is to not provide human support. It’s expensive to hire support people — that’s why it’s often outsourced, and why companies try to make their software “self-service.” Now, that can be good because it forces software companies to try to create more intuitive software. However, for complex business-to-business applications like online scheduling, intuitive design can only take you so far.

When doing your due diligence on scheduling software companies, always be sure you can talk to a live person when you have questions. Also, be sure that the company offers live training and set-up assistance.

Knowledge bases and how-to videos are great. But when it comes to getting a scheduling system optimally configured for your organization, it’s imperative that your support team has a heartbeat.
The best software companies not only implement tight controls on their own, they also have a third party certify them. The standard certification for controls in a software company is called SSAE16 SOC 2 Type 2. It’s not easy to achieve, because it forces a company to prove that they not only have controls, but also strictly enforce them.

While a certification can’t guarantee that a software company won’t have a breach, it can reduce the likelihood of such a crisis. Because your data and your organization are too important to take chances, be sure that any scheduling vendor you consider has this certification.

Will Your Data Be Secure? How Secure?

This question is not one to mess around with: Will your choice for an online scheduling application protect your data?

By 2019, it is estimated that data breaches will cost companies $2.1 trillion a year. And while the financial impact of a breach can be shocking, the reputational hit that companies risk from these events often prove to be even more painful. There are organizations that have spent years trying to rebuild the trust lost from one security event.

Even the most security-conscious organizations, like government entities, consistently suffer data breaches. They spend millions of dollars on firewalls, anti-virus software, and intrusion-detection systems. But all it takes is one employee error to allow hackers to gain access and wreak havoc on critical systems.

Software companies can prevent human error by implementing strict controls. While these controls definitely address server access, security-aware companies go way beyond that standard. They create and enforce processes ranging from who can access the building to how often passwords have to change.
When it comes to online scheduling software, there are several key factors that can impact your time-to-market. So when considering an online booking system, keep the following in mind:

**Implementation Considerations**

- Does the scheduler have a well-documented, robust API?
- Will the software company help create custom training materials?
- Is live one-on-one or team onboarding provided?
- Can you get data upload assistance from your vendor?
- Does the application offer single sign-on, out-of-the-box?
- Are implementation services available?

**Will Implementation Be Quick and Optimal?**

It’s also important to find out if a vendor can implement the online scheduling software quickly and optimally.

When businesses make the decision to implement an online scheduling system, they generally want to roll it out as quickly as possible. It’s common knowledge that you never want to rush a software implementation. Pushing it forward before the system and organization are ready can be a real disaster. But time is of the essence when you know an application will benefit your organization.

The period between when you make the decision to proceed with a particular scheduling system and when you go live is critical. It’s the phase in which you are finalizing process changes, getting staff prepared, and making sure the system is set up and configured properly.

That’s the time when it becomes abundantly clear whether or not an online scheduling company is capable of supporting your rollout. It’s essential that they be arm-in-arm with you and your team during this sensitive stage.

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Don’t Be Forced into a Lengthy Contract

If a software vendor forces you to buy an annual plan, politely walk away.

Here’s why: The trend toward subscription-based software is fully underway. Companies are quickly moving away from installed software in favor of the web-based variety. This type of software, known as "software as a service" (SaaS), has numerous benefits. There’s nothing to install, you automatically get updates, you don’t have to worry about having your own servers, and you can access your data 24/7 from anywhere in the world.

But there’s another trend with this type of software you should know about. Most of these web-based software systems have annual payment plans, and some even require an annual commitment. If you’ve been using a system for a while and it’s working well for you, paying for a year upfront makes sense, because you may get a discounted rate. But, when companies force you to pay for a year upfront before you’ve even implemented the software, that should raise a red flag.

There are good reasons why a software company would want you to commit to and pay for a year in advance. It allows them to take in more cash, while also minimizing their short-term cancellation rate. It’s smart for software companies to do this, but mandating your commitment to an annual contract right from the start is not looking out for the best interests of your organization.

When you choose an online scheduling system, start with the month-to-month plan. It will allow you to ensure that the system will work for you before you commit. Monthly plans allow you to cancel at any time. So, if you find that things aren’t working out, you aren’t stuck with the system for a year.
We Wish You the Best of Luck in Your Search!

Whether you work for a Fortune 500 company or are a sole proprietor, moving to an online scheduling system is an important decision. If you’re considering a scheduler now, your timing is good. Online scheduling is not yet ubiquitous, but it will be soon. That means that your customers will expect to be able to book online in the future, and that prospective customers will start to make buying decisions based on this capability.

This Online Scheduling Buyer’s Guide™ was designed to help better prepare you for your analysis of online schedulers. There’s a lot to consider, but the more thorough and careful you are from the start, the better your results will be over time.

We hope that you and your organization are able to reap all the wonderful benefits that online appointment booking can provide.

Good luck!
We Invite You to Join the Online Scheduling Revolution

If you’re like most busy professionals, you need about 36 hours a day. It’s time to give no-shows, endless follow-up calls and emails, and inefficient staffing the old heave ho. Instead, elect to embrace the smarter, modern leader in online scheduling software: AppointmentPlus.

• You’re invited to take part in a free, personalized demo with one of our online scheduling experts, who will listen to your business needs and show you how AppointmentPlus can help.

• Build your business – with scalable, cloud-based appointment technology that fits organizations of all shapes and sizes.

• Increase organizational efficiency – automating your scheduling process eliminates the need for manual confirmations and reminders, and reduces no-shows and miscommunications.

• Delight your customers – by allowing them to book appointments at a time and manner that’s convenient for them.