APPOINTMENT

SCHEDULING

SOFTWARE

sas
Specialty Answering Service

Contents

1.   Abstract

Busy companies do not have the time to keep track of all their appointments. For this reason, many companies choose to outsource their inbound calls to a call center, where agents can take over the task. This article offers information that will help companies choose the best type of appointment scheduling software. The benefits of using the software will be discussed, along with appointment setting terms and phrases, and a comparison of the top five software providers.

2.   About

2.1.   Who Needs Appointment Setting Software?

Many industries look to call centers to handle their inbound calls, accurately take down messages from customers, successfully deliver those messages, process orders, and set appointments. Medical offices, dentists, restaurants, hair salons, nail salons, HVAC industries, automobile shops, and more all rely on call center agents to schedule customer or patient appointments for their businesses. Doctors rely on call center employees to schedule patient checkups. Restaurant owners and HVAC workers trust call center agents to fill up their calendars without overbooking. Although popularly utilized in call centers, companies that do not receive excess call volume can go straight to the source and purchase scheduling software to use in-house.

2.2.   Why Use Appointment Setting Software?

Call center agents are required to take calls from various industries and keep track of appointments as well as make outbound reminder calls to clients. Software is implemented to better assist agents in the scheduling process. This type of technology can help agents use their time more efficiently, keep everything organized, and allow for the possibility of taking on more clients. Investing in calendar management software provides an advantage over more basic call centers that cannot offer an appointment setting service.

For companies that choose to utilize this technology in-house, the software can help in a similar manner by keeping the days and appointments organized while avoiding gaps in business or overbooking appointments. Receptionists would act just as call center agents would, and it would lend an air of professionalism to new or small businesses.

2.3.   Scripting Scheduling Conversations (in Call Centers)

When designing scripts for scheduling appointments, it is best to use your own company instead of outsourcing. By doing this, you ensure that the dialogue will flow naturally between your agents and the clients. The goal is to create a script that sounds polite and experienced, while also being concise and effective.

While agents are interacting with clients, available appointments will show on their screen. Without having to sort through the calendar for availability, scripted conversations can continue seamlessly, making things easier for agents and clients alike. The agents can punch-in the new appointment information or search for a time that works best for the caller, without the need for hold time.

2.4.   Standard Features Offered by Appointment Setting Software Providers

Most scheduling software comes with:

- The ability to send out appointment reminders, either through text, email, or by phone

- Some sort of free trial or a demo of the software

- Customer tech support, but only a few provide support 24 hours per day

- The ability to integrate the software into other programs (like Google Calendar and Microsoft Outlook)

3. Before Choosing a Software, Ask Yourself These Questions

3.1. How much am I willing to spend?

Some software is more expensive than others. If you run a busy business or call center, the investment might be worth it. The more pricey providers tend to offer more features such as 24-hour customer support, the ability to customize the appointment calendar and more storage space.

3.2. Do I need a free trial?

While some providers only offer a short software demo on their website, others offer as much as a month long free trial. If you have never dealt with this type of software before, choosing a provider that offers a trial period is highly recommended before making any sort of commitment.

3.3. What other programs do you use?

Some providers offer technology that can be integrated into your existing software and be viewed as an extension of your own company. Other providers work with email and sync with online calendars. Some are completely separate; this may take more time for agents or receptionists to learn.

3.4. Do I need to have text message reminders?

Most providers offer some type of reminding system, whether via email alerts, or phone calls. Some actually offer text messages sent directly to customers' cell phones to remind them of upcoming appointments or events. Depending on your client base, a text message reminder may be a necessary feature.

4.   Terms to Know

Reminders

Notifications are sent out in the form of texts, emails, or phone calls to remind clients of upcoming appointments.

Integration

The ability to combine the scheduling software with other applications used in your business or call center

Outsourcing

Using another service (often used when describing call centers abroad) to make client appointments instead of using your own agents and software

Regulations

A specific protocol used by call center agents that states how different industries' clients should be handled while making appointments, a lot of which has to do with the predetermined script given to all call center agents; this may vary depending on company or industry

Virtual Secretary

Sometimes, scheduling software is referred to as this, because it acts as an electronic bookkeeper and reminder system by keeping track of your appointments/events.

5.   Software Providers

5.1.   Appointment-Plus

Pros

It can send appointment reminders as texts.

Cons

Not all users get a free trial.

Conclusion

Appointment-Plus' purpose is to aid call centers in properly scheduling all types of appointments for clients. It offers an easily navigable and quick acting control panel for the user and has the ability to send appointment reminders in the form of emails or text messages. It can be integrated with other software programs such as QuickBooks and Google Calendar. It also has mobile apps for smart phones and a built-in workforce management tracker.

It can be used in combination with social media outlets, which helps clients stay connected. Set-up is free, but a free trial is not available for all users. They offer multiple plans, ranging from $79 to $349 per month. Unfortunately, only the least expensive plans offer a free trial.

5.2.   TimeTrade

Pros

They have mobile apps and the software is easy to use.

Cons

They offer a demo, but no free trial for larger software packages.

Conclusion

TimeTrade is advertised as "the world's most widely deployed online appointment scheduling solution for large organizations." It offers many different versions of appointment settings software. They have a free personal scheduler that allows you to coordinate up to five appointments per month. The pricing for more advances software is listed on the site, but those interested have to inquire about the larger package pricing options.

They have a business/call center scheduler that can offer multi-locational support, mobile apps, and customer overflow management. Their software is easy to use, with "one touch" scheduling for agents or receptionists. They do offer a free demo and a trial for basic software packages on their website, but do not have a free trial period for advanced software.

5.3. Squeeze-Me-In

Pros

They are inexpensive and offer the first month for free.

Cons

They are a small company.

Conclusion

Squeeze-Me-In is very user-friendly. On their site, they say that people can learn to use the software in "minutes not weeks." This software gives customer the option of scheduling their appointments themselves online. Their software can hold over 5,000 appointments per month in their system. They also support multiple languages and have a free demo. The software was developed to help hair salons, dentists, call centers, answering services, and automobile detailers.

They are a small company so they do not offer a lot of customer support, cell phone apps, or text message reminders. They are inexpensive, at a flat rate of $35 per month. They also offer the first month free for all customers and have a sample interface for tanning salons on their website.

5.4. Schedule Complete

Pros

They work with Outlook and send out reminders via email.

Cons

They do not mention a trial on their site.

Conclusion

Schedule Complete is a new software provider on the market. The software is customizable and offers phone reminders about upcoming appointments. It can be integrated with Microsoft Outlook and Google Calendar. They offer technical support 24 hours per day. The software costs $149.99 but it not clear if that is a one-time fee or monthly.

5.5. VanillaSoft

Pros

They have a free trial and send reminders via Outlook.

Cons

They don't have 24/7 customer support.

Conclusion

VanillaSoft says that they are "simply the most productive appointment setting software for agents..." They have positive reviews listed on their website. Their interface allows agents to access and view multiple client calendars at one time. They work with other programs, like email, and have automatic reminders sent to customers via Outlook.

The software can be customized according to scheduling regulations, like minimum appointment duration and maximum number of appointments allowed in one day. They offer a trial along with email and live operator customer support. However, the technical support is not available 24/7. They have different plans ranging from $25 to $65 per month. The highest cost plan offers a 30-day free trial, but the two less expensive plans only offer 14 days. There is also a demo on their website.

6.   Appointment Setting Matrix

Name	Website	Trial	Reminders	Integrated	Free Setup	24/7 Customer Support	Mobile Apps	Pricing
Appointment Plus	http://www.appointment-plus.com/scheduling_software/call_center_scheduling_software.php	Yes	Text and Email	Yes	Yes	Yes	Yes	$79 to $349 per month
Time Trade	http://www.timetrade.com/ products/enterprise-edition	Demo	Yes	Yes	Doesn't Say	No	Yes	Inquire for professional scheduling software
Squeeze Me In	www.squeeze-me-in.com	1st Month Free	No	It can be branded as your company.	Doesn't Say	No	No	$35/month
Schedule Complete	www.schedulecomplete.com	Demo	Via Phone	Yes	No	Yes	No	Inquire
Vanilla Soft	www.vanillasoft.com	Yes	Yes	Yes	No	No	No	$25 to $65