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ENTERPRISE APPOINTMENT MANAGEMENT
HOW TO IMPROVE CUSTOMER EXPERIENCE AND OPERATIONAL EFFICIENCY USING APPOINTMENT MANAGEMENT

A QMATIC WHITEPAPER

Abstract

Today's society is increasingly connected 24 hours a day. From smartphones and tablets to computers, it is how a growing number of people want to view information, communicate, purchase and conduct routine daily tasks that previously were done manually.

Scheduling appointments is routine among many businesses and organizations today. We have traditionally seen it in sectors like Healthcare, Public institutions and Retail Banking for quite some time, often focusing on operational efficiency. What we now experience is that more and more organisations, including retailers, are using appointments to realize business benefits.

The traditional appointment process is not always as simple as it seems. It often requires significant time and staff resources to properly manage it. This white paper describes the challenges overcome by using appointment management and how to move it online. It is having a customer experience and operational efficiency in perspective when addressing the challenges and needs.

Qmatic has been in the service to great customer experiences for more than 30 years. Our solutions, systems and knowhow have also been applied to the Public sector all over the world where the focus is to improve customer experiences and operational efficiency with the methodology Customer Flow Management (CFM) that was invented by us.

Solutions with Customer Experience Management (CEM) and the methodology Customer Flow Management (CFM) assist organizations around the globe to reduce costs while offering better service.

Introduction

Business organisation as well as public institutions and healthcare providers have traditionally seen the benefits with appointment management from a resource planning perspective. It serves its purpose there and its serves it well.

In the light of that society is increasingly becoming connected to the internet 24 hours a day, the same organisation now turn to appointment management to reap the benefits in areas of customer experience and market differentiation.

For example, more and more retailers are using appointments to stay ahead of competition by offering services when customers want it and where they want it. Many organizations use this also as a way to create a seamless customer journey, from online to offline premises supporting an omni-channel strategy.

By interacting online and using booking appointments customers get access to the service they want, by a real expert in store, at the local government or even the in doctor's office.

The access to the services offered is at any hour of the day, extended far beyond the normal operating hours. It delivers all the services at the fingertips of the customers across an entire enterprise network. The result is significant time and money savings and improved efficiency for staff.

Appointment management is often the start of a well-managed customer journey, where an efficient operation and enhanced customer experience is in focus.

As we meet many small and large healthcare organisations we notice that more and more stop talking about "patients", instead they use "customers". We think this makes a lot of sense; this is why we refer to customers only in this white paper.

"Moving appointments online brings both time and monetary benefits to an organisation."
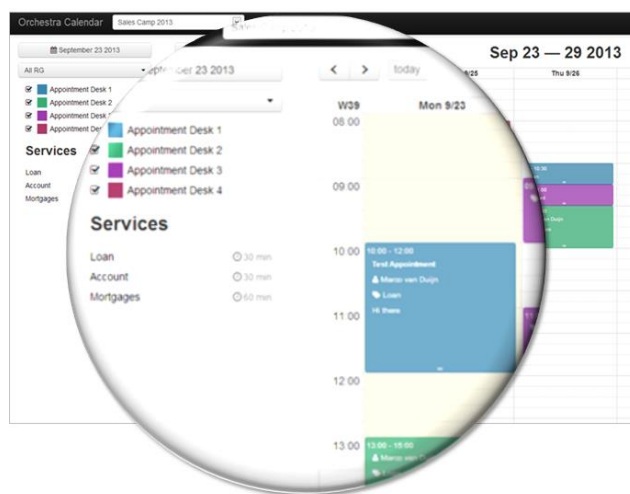
Challenges

Any organisation; business, public institution or healthcare that is in the service of delivering great customer service, knows that it is not only about delivering what the customer wants but also when they want it.

This is a challenge that puts stress on organisations to have the resources in the right amount in the right place - and of course with the right skills. The consequence of not managing the process well is either to under deliver due to lack of staff and resources, or having unused resources at low traffic when designed to take care of peak hours.

Either way it is a loss for you as a service provider and ultimately the customer.

From our involvement in customer intense businesses for more than 30 years, we have seen these challenges that successfully can be addressed with appointment management:

1. Improving efficiency
2. Improving the customer experience

There are sub set of interacting factors that affects the main areas which will try to clarify and address.

The question is how can appointment management methodologies turn these challenges into opportunities, so that everybody benefits - staff and customers alike.

Meeting the challenges

IMPROVING EFFICIENCY

When improving operational efficiency through a well implemented appointment management solution, there are number of areas that are influenced in a positive way, some more significant than others. We will focus on the ones that make a major impact and are well worth implementing.

Smoothing workload over time

The lunch crunch – you know it well. Imagine being able to spread out the service workload evenly throughout the day instead. With an appointment solution, you can optimise your workforce requirement by steering customers to less busy hours, which helps eliminate the problem of over staffing or understaffing.

This is basically a way of "moving" customers in time to meet them when it not only fits you as a service provider, but also is the choice of the customer. The cost of overstaffing at low traffic can be kept at minimum as well as the under staffing effects on customer experience.

Local vs. Enterprise

Traditional scheduling methods all have one thing in common: they have a manual component to them. Also it is difficult to having full visibility of the available resources. Isolated booking systems for individual departments and/or offices do most of the time not fully provide the opportunities of a totally integrated online appointment management system.

Instead, if the entire organisations resources are visible and available you can not only extend availability of resources during a time period, but also over a network of offices and branches and thus use your resources in a more efficient way.

Matching availability of competency

In the highly competitive world we are living, customer retention is one cornerstone of profitability. Customer retention strategies can take many forms from improving the overall experience when customers visit a branch through to managing a request for specialist advice and services more efficiently.

Using appointment management will allow you to match service requests to your best available resources. Not only will the quality of service improve but also as the efficiency as staff has the right competency to deal with the specific customer request. When a customer has pre-booked an appointment it is also possible to

"Online Appointment Management allows you to match a service request to your best available staff and resources."

prepare the case in advance which brings further benefits to both the customer and to the service provider.

Appointments cancellation/DNA:s

Even when it's possible to book appointments, there is often the problem of customers who do not show up for their appointments, "Do Not Attend" (DNA). Customers who miss their scheduled appointment are more than a minor inconvenience. Their actions can result in lost revenue, changes in schedules and increased expenses.

In healthcare as much as 10-12% of appointments in a clinic are cancelled and up to 35% of all appointments made by patients are re-scheduled.

By implementing an appointment solution and integrate it with a self-check in solution, (self-service and/or meet and greeter) you can serve customers and walk-in patients when scheduled customers do not attend. This is a way of improving the efficiency and profitability substantially.

Other means of getting the DNA:s to a minimum is using the appointments system to send automatic reminders. A study from Healthcare shows that text message reminders increased appointment attendance by nearly 50 percent. [Health Services Research]

Online vs. phone

Telephone, pen and paper are in many cases no longer acceptable means of booking appointments. Imagine answering phone to make a reservation, returning voice mails on missed calls and making changes to existing reservations. Even if it just takes a couple of minutes per call it quickly adds up to significant amount of staff time.

Customers demand speedy, efficient booking. Online appointment management is often the answer and solution to this request.

" In healthcare as much as 10-12% of appointments in a clinic are cancelled and up to 35% of all appointments made by patients are re-scheduled."

Integration to third party systems

There is a large amount of online booking systems available in the market and they provide more or less the same features. Many organisations also rely on systems such as Microsoft Outlook, Exchange Server or Google to manage their appointments.

None of these systems manage the process when customers arrive to the physical location. This is why it's pivotal to integrate the online booking system with the arrival system on site. Typical arrival systems are self-service kiosks and queue management systems.

"A frequent protocol used for integration within Healthcare is HL7. Integrating online booking with a queue management system provides the means for a seamless customer journey"

When these arrival systems are integrated to the appointment system it is possible to provide a seamless integration between the virtual and physical world and thus to provide a great journey for the customer.

When looking for providers of integrated booking and queue management systems it is important to review their integration tools and capabilities. For example within Healthcare using the H7 protocol to exchange data is often a must. Having experience from this is then of course important when embarking on integration projects.

IMPROVING THE CUSTOMER EXPERIENCE

The start of the customer journey

Appointments are often seen as the end point and final destination of the customer visit. What it really should be seen as is the start of the customer journey. A customer journey that is seamlessly integrated through all channels – online and offline. An Appointment system integrated to a self-service check-in and Queue Management system allows your customers to book an appointment online, get greeted at arrival and directed to the right service at the right time. Thereby creating a consistent and great experience, matched in in all channels.

Quality of service – meeting a real expert

As organisation increasingly confronts challenges posed by low-price competitors and online vendors, customer service has emerged as an alternative source of revenue and of differentiation from the competition. Being able to meet staff with the right skills, where and when the customers want is a true differentiator. How many times have you tried to hunt down staff to get the service you want and when you finally get them, they know a lot, but very little about your issue.

Appointments are a very good tool to match staff skills and availability with the demands of the customer.

Access to service – location and time

As previously described, appointment management is a tool to smoothing workload over time and location. It is also for the same reason a tool for great access to service when customers want it where they want it to be delivered. A customer can at any time simply select the branch that fits best at the time that fits best, empowering the customer and thus improves the experience of the journey.

Reduce actual waiting time

Waiting to be served is usually a waste of time. It can be frustrating and stressful. Customers can feel neglected. Waiting time also says a lot about the efficiency, and perhaps even commitment, of the organisation. The goal is to keep waiting time to an appropriate length. After all, it goes hand in hand with an enhanced customer experience.

"A mobile solution allows your customer to reserve a time on the move."

In addition to streamlining the customer flow and making it more efficient, an appointment solution reduces the actual waiting time for customers by steering them to less busy hours. The staff is used in the most efficient way. In addition to this the customer can really spends their "waiting at home", doing all but waiting to get served.

Waiting is a major impact on the customer experience. For example, recent studies show that up to 65% of patient's rate waiting times in clinics as unsatisfactory (McCarthy, McGee, & O'Boyle)

Mobile appointments

The mobile revolution will inevitably transform most companies business in the next decade and will trigger a more radical transformation toward systems of engagement. Mobile engagement empowers people to take the next most likely action in their immediate context.

A mobile solution allows you to deliver service in a relevant way and straight into the customer's palm. Your customers will be happier with a serving process that is fair and clear – and that even offers directions. You will be happier because your process will be more cost effective and you will soon find that you can serve more people with less resource.

Results /conclusion

As we have shown a customer journey often start before the customers physically visit the shop, bank, hospital or public service center. By implementing a method to book appointments before arrival multiple benefits are gained, both the customer and the service provider.

Appointment management reduces the time spent waiting by the customer and hence has a positive impact on the customer's service experience. For the service provider it can be a tool to control and steer the flow of customers away from peak hours to less busy parts of the day. It can also be a powerful tool that delivers the pre-visit data required for the service provider to staff more appropriately and deliver better customer service.

Summing up, the key benefits of an online appointment management system are:

- **Ease of access**: Ease of access means that customers easily can find you and book a meeting with you – through a laptop, tablet or smartphone. Improved customer experience relates to increased customer retention.
- **Saves time:** A customer can make an appointment with you just within a few minutes from the comfort of their home or workplace.
- **Improved efficiency:** With an appointment management system it is possible to even out customer flow, to match service request with the right resource and utilize staff in a more efficient way.
- **Anytime - Anywhere:** In an online appointment system a customer an make an appointment any time, just like as if you are providing 24x7 services.

What to look for in an appointment management system

There are some basic features that need to be in place in an online appointment management system. Some of the key features we believe are important are:

- The system should include a web-based calendar and online appointment module.
- In order to manage the full customer journey and make it seamless, the system should be fully integrated to the queuing and self-service check-in system
- The system should easily integrate easily third party online appointment systems and calendar solutions (e.g. Microsoft Exchange Server) through well-defined and documented web services
- It should be easy to configure and possible to personalize the user interface.

If you want to know more about what your business can achieve with our solutions, just let us know. We'll be happy to prepare an ROI model based on your business situation and your requirements.

"A 2% increase in customer retention has the same effect as decreasing cost with 10%."
Leading on the Edge of Chaos, E & M Murphy

About Qmatic

"There is only one boss - the customer. And he can fire everyone from the chairman down, simply by spending his money somewhere else".
Sam Walton, 1977

Qmatic's vision is to realize the full potential of every meeting. We help our clients engage and interact with their customers from the very first touch point. We gather information around the customer journey and help create brand value from improved customer experiences. By creating a seamless customer journey from online channels through to face-to-face meetings, we increase customer experiences and strengthen our clients' brands.

Qmatic holds market leading positions in the public sector, financial services, retail, and healthcare applications and it is estimated that more than a quarter of the world's population pass through a Qmatic system every year.

Qmatic has a truly global footprint and operates in over 120 countries through own subsidiaries and partner network. The Qmatic Group has a turnover of EUR 60 million and employs some 300 people. The company's main owners are Altor Fund II GP Limited and ICG.

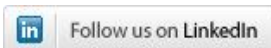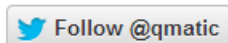Qmatic Group
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