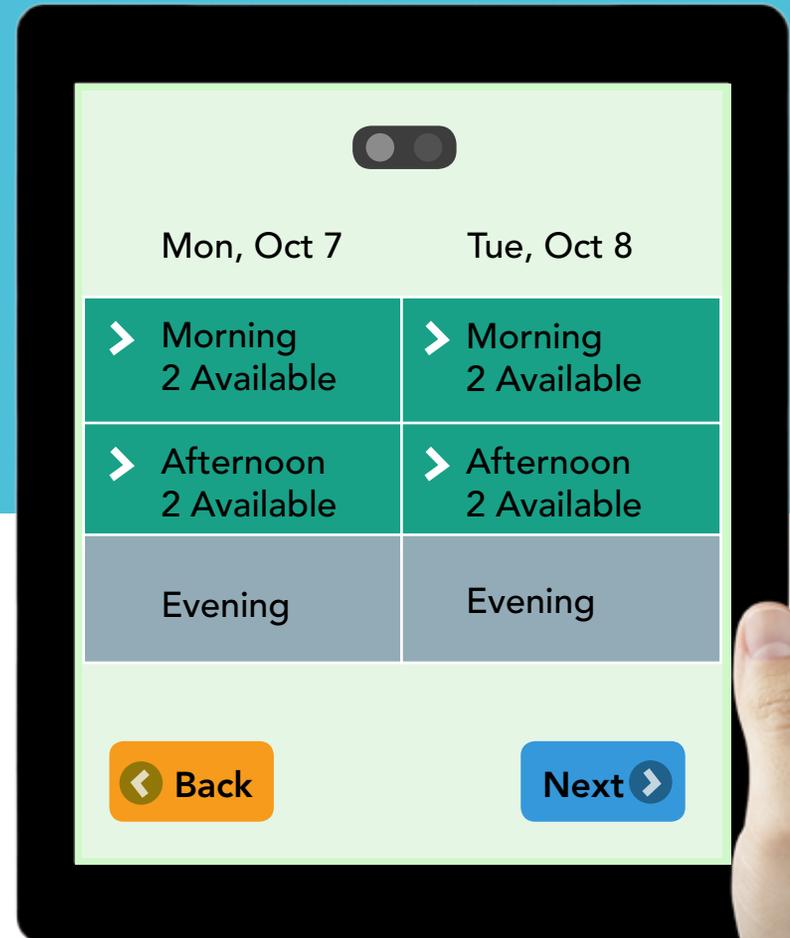


8 Ways To Do

Mobile Appointment Booking Right



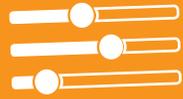
One Of the Best-Kept Secrets in the Service Industry is Mobile Appointment Booking

Why? While customers love making their own appointments, mobile appointment booking is also a behind-the-scenes game changer for successful service operations.

In this eBook, we let you in on the secrets of industry best practices for mobile appointment booking. With a few simple guidelines, you will be able to deploy a quality appointment booking solution that will give the best customer experience possible, while considering all the sensitive issues around a profitable operation.

In the end, you will be exceeding your customer's expectations and your business goals, too.





Let Customers Have Control



Customers love to have control, so give it to them.

It's a fact that customers enjoy having the ability to schedule their own appointments. Whether it is during a lunch break or in the middle of the night the customer can make a decision to enjoy making an appointment at his or her own convenience. And they expect to do it without having to talk to a customer service rep.

So naturally cross device, cross browser functionality is paramount to service businesses who want to create content that will "work anywhere". That means that your appointment booking solution should be compatible with any device – laptop, tablet, mobile phone. You also need to take it a step further and make sure your appointment booking is available for customers on multiple social media channels. This translates into a consumer first service orientation that gives a better customer experience right from the start.



Best Practice

Make appointment booking compatible with every type of mobile phone and make it available on every social media platform possible.

Fun Link

[Blog: Is it Time to Shine for HTML5?](#)





Use Truth Based Appointment Booking

Based on actual capacity, truth-based appointment booking enables you to book appointments in your existing schedule based on true job durations and travel times.

This allows you to make more accurate bookings on the day of service and carry out the schedule as originally intended. When the resources actually travel, the travel times are accurate, because they are not just estimates – they are calculated with precise details about traffic, construction, and historical travel times that come directly from the system.

Think twice before using the alternative bucket approach. It estimates the average job duration along with the average travel time, and with this information fills in the bucket as customers call. This can leave you with idle time or cause you to overbook the time slot with too many resources.

While no schedule is perfect, when you use actual data instead of estimates to build your customer's appointment, the closer you will come to business nirvana.



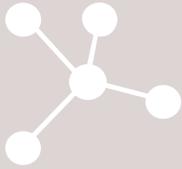
Best Practice



Stick to the actual facts when building appointments and schedules to keep resources productive and deliver "top-notch" service.

Fun Link

[Video: Truth Based Appointment Booking vs. Bucket](#)



Use Graded Appointment Booking

Booking an appointment is what puts the wheels in motion for a service agency. ▼

Since this is a critical first step in getting service right, why not offer customers appointment slots (appointment windows) that already meet your business objectives right from the start? This is where graded appointment booking comes into play – it uses your business objectives to give a grade to each optional slot. For instance, if your main business objectives are to reduce travel costs and reduce overtime costs, then all of the appointment slots that are closest in travel distance using no overtime hours will be given higher grades while appointment slots that require longer travel and/or the use of overtime will be given lower grades.

With the appointment slots listed in order from highest to lowest, you can offer first the slots with the highest grades. If the customer needs more choices, the next slots in line can be offered, and so forth, until the appointment slot is chosen. Keep in mind that a customer usually chooses one of the first three appointment slots offered. So you can safely estimate that by putting the top-ranked appointment slots in front of your customers, your business objectives are going to be met.

With each appointment meeting your business rules, graded appointment booking can become a virtual playground for savings. And with the higher graded appointment slots being offered first, the more savings you can reap.

Best Practice



Take into consideration your company's business objectives when scheduling in order to give customers appointment slots that are already in line with your company's business objectives.

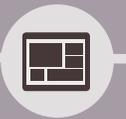


Introduce Virtual Assistants

Now is the time to think about integrating virtual assistants into your appointment.

Since they are getting smarter, virtual assistants offer a more advanced interaction with the user. You can expect that the current generation of virtual assistants will evolve into ubiquitous intelligent systems that will communicate with people through not only voice, but also text, vision, touch, and gestures. They also will factor in surrounding information like location or motion to provide a better understanding of context and greater relevance to every interaction.

Try mobile apps in the form of digital IVR (Interactive Voice Response) that provide better responses and a more advanced interaction with customers. Such features as drop-down menus and integration with forms expedite the gathering of information, filter out the problem, and actually solve the issue before you send a technician on the road. In other words, virtual assistants can take the load off the contact center and at the same time reduce field-service costs by solving a problem online before truckroll costs are incurred.



Best Practice



Use interactive digital IVR systems to gather information and solve problems online, thereby reducing contact center and truckroll costs.

Fun Link

[What is Truckroll?](#)



Create Two-Way Communication in Two Ways

With mobile appointment booking, your customers are coming to you. Seize this momentum to create an open channel of communication through a valuable two-way conversation that builds customer loyalty.



Set Up a Message Structure

Allow customers to send messages and specify in their own words what the problem is. Follow up with the customer if there is a schedule change or an arrival problem. Once a customer message is received, it should be shared via internal collaboration tools for consideration with the entire team – managers, field technicians, and sales managers. With everyone in the know, you increase the chances of a first-time fix rate and a better customer experience.



Set Up Email and Text Reminders

Simple text reminders have been proven to be more successful than the basic phone call in reducing no-shows. By providing a link in the message to reschedule the appointment, you give customers a second chance to change or cancel at the last minute if necessary. You should have plenty of time in the morning to take into account the canceled and rescheduled appointments, reshuffle the schedule with an automatic background optimizer, and publish a fresh, fully optimized schedule by the first shift.

Best Practice



Reduce miscommunication by opening up a two-way conversation with your customers and by offering reminders and reschedule links in time to reshuffle schedules.

Fun Link

[Video: Shout - a Real-time, in-context collaboration tool.](#)



Know Before You Go

Today, one of the most important assets is information.

Show up with all the customer information already in your mobile device, and you have a winning service call. Knowledge about the needs and likes of your customers, your inventory position, and your technicians' skill sets is crucial to the success of your business.

Mobile appointment booking software helps you get on top of your business from every angle. The key advantages are that you can track everything in your mobile device from viewing full customer appointment history, service and product purchase history, and customer satisfaction comments, to name just a few. Statistics show that a good service experience will result in 62% of customers purchasing more – and 24% of customers will continue to seek out the vendor up to two or more years after a good experience. By simply knowing customer details before you go, you can create customer loyalty that will reflect in future business profitability.

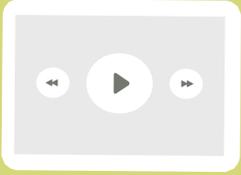
Best Practice



Make all customer details and transaction history available on mobile devices to managers and field technicians, so they know all the relevant information before they go.

Fun Link

[Infographic: Service Can Make or Break a Company](#)



Reserve Capacity with Real Simulations



This is where mobile appointment booking really shines.

Mobile appointment booking can help you plan capacity in advance. And we all know that planning in advance will allow the scheduling system to go from reliable to optimal, and will improve in-day scheduling factors such as missed appointments and first-time fix rates.

Mobile appointment booking already defines the main factors needed for capacity planning: how much work should be done per day, location and task type, what service level can be achieved, and how many resources are needed.

By using a real simulator, you can properly place the technicians in the schedule – and where there are gaps, you can control the amount of overtime and subcontractors used. This will give you the optimal capacity allocation for demand and allow you to offer graded appointments that increase the number of jobs you are able to complete per day. By knowing your capacity needs, you can also do a gap analysis to show the difference between what you have and what you should have in order to achieve SLA compliance. This first step in reserving capacity for your future needs will allow you to offer more time slots to customers. And, if your simulator is connected directly to your scheduling solution, you can inject the desired results right into your daily schedule.

Best Practice



Use a simulator and do gap analysis to plan capacity and future needs and to offer more time slots to your customers.

Fun Link

[Brochure: Capacity Planning App](#)



Give Service with a Smile

With online appointment booking, you have already reduced the friction that comes with a customer waiting for a call center agent to answer a phone call. The customer is already smiling – and what could be better than having your customer open the door with a welcoming smile, ready for your services? Your technicians are smiling, too, because they arrived on time, with the right tools, and knowing exactly what they need to do. The result is a more efficient organization in which your field workers can focus more on making customers happy, and your contact center and dispatchers can spend less time on answering phones and reshuffling schedules. So now all that's left to do is ... smile.

Best Practice



Use mobile appointment booking to release the stress of customers' wait times and start the service call on the right foot.

Fun Link

[Service Challenge: Can You Turn Carol into a Happy Customer](#)

About ClickSoftware

ClickSoftware is a global leader of automated workforce management and optimization solutions for the service enterprise. Available via the cloud or on-premise, our solutions provide organizations with end-to-end visibility and control over the entire service process, while providing them with tools to drive their business forward by optimizing forecasting, planning, scheduling, mobile workforce management and customer communication.

ClickSoftware solutions boost productivity and increase customer satisfaction, while decreasing overall service costs. That's why ClickSoftware is the number one choice to deliver superb business performance to organizations of all sizes, in all service sectors.



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