



Online and Mobile Appointment Scheduling

Saving both your agents and customers' time by offering online and mobile app self-service appointment scheduling.

May, 2013

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Many businesses, such as clinics, banks and telecoms, use Q-nomy's Q-Flow® Calendar to set up appointments between customers and agents.

Allowing customers to schedule appointments offers many benefits: it enables quicker service, shorter lines, and greater agent efficiency. Moreover, where meetings present sales opportunities, it allows agents to prepare and increase their success rates.

Traditionally, scheduling an appointment would involve a conversation between the customer and a secretary or a call center agent. However, building a self-service online or mobile application to allow customers to manage their appointments could be much more efficient. This article highlights some aspects of this topic.

Appointment Management with Q-Flow

Web interfaces can be built for almost any scheduling system. However, Q-Flow offers many unique advantages in this respect:

- **"My Visit" App** – a ready-to-use mobile app, which allows end-users to browse all service providers, locations and service types, make appointments, check-in for service and more.
- **"Q-Flow Central" Mobile Applications Platform** – a cloud-based platform that provides a secure and easy link between end-users and Q-Flow, allowing businesses who do not want to use "My Visit" to create their own custom application.
- **Web Service API** – an interface, which allows application developers easy access to scheduling, searching for vacancies, looking up previously scheduled appointments etc. This allows businesses who do not want to use the "Central" platform, to develop their own online or mobile scheduling infrastructure.
- **An Open Database** – stored procedures and database architecture which enable access to appointment data in addition or instead of the API

- **Ready to use Business Logic Infrastructure** – to search the calendar for vacant slots based on preferred days, time of day, location etc.
- **Integration with Queue Management data** – allowing the creation of a single web-based interface where customers can both check current (or expected) waiting time at any service location, and schedule an appointment

All in all, Q-nomy provides almost unlimited options for enabling online and mobile appointment scheduling, using either out-of-the-box or fully customized interfaces.

For those businesses that prefer to use the basic Q-Flow components in order to create their own customized solution, the rest of this article offers some [tips and recommendations](#).

For more information please visit: [Q-nomy's mobile application page](#)

Architectural Aspects

The overall architecture of the solution is primarily dictated by the organization. If the solution needs to be integrated into an existing website or mobile app, then it will also to conform to their existing design and technology. Two important issues that should usually be considered are:

- **Information Security** – As in any interface that allows external users access to internal enterprise systems, information security is not merely another element of the development path but a major factor of the software specification. Security constraints will determine the selection of development and hosting tools, and can affect significant attributes of the solution, e.g. is data presented to users updated online or periodically.
- **Data Synchronization** – Information Security constraints may dictate a separation of the enterprise database and temporary storage used by the internet application. This calls for a synchronization method that ensures data integrity and prevents conflicts. Different methods exist, such as reserving different time slots for different systems; using the internet application for internal users as well; locking internal system time slots when they are reviewed by external system users; and so on. Choosing the right method may be affected by the rate of synchronization, distribution of usage volume between internal and external users, calendar occupancy level etc.

Building an Effective Scheduling Application

The self-service application is intended to save the customer's time. Untidy GUI, slow responses or complicated design would deter the customer. A neat application that is easy to use would increase the proportion of customers choosing it over speaking to an agent.

Following are just a few basic rules for building a better interface for a web-based or mobile appointment management system:

- Do not put off the customer with an entrance page full of controls and prompts. The interface would be better off if constructed as a sequence of simple pages, each with a single prompt or message. For instance – Page one asking the customer for the required type of service; Page two asking for a preferred location to receive the service, and so on.
- Freedom of choice is nice, but overdoing it is not. Where choices can be narrowed down, do so. Instead of presenting a list of every city in the state, ask for a county or region first; instead of asking for an accurate time for a meeting, ask for a rough range or rounded hours ("10:00") and then suggest the nearest available time-slot.
- Forget all about the internal interface of the scheduling system; it is of no concern for external users (customers). The external application design should only consider the customers' expectations, the brand's design guidelines, clear wording (rather than technical jargon which may be used internally), and of course adhering to UI design conventions.
- Provide an easy method for the customer to retrieve a previously scheduled appointment, and a way to re-schedule or cancel it. You could use cookies or customer identification to store the last scheduled appointment for quick retrieval. You might also email the customer a direct link for the appointment details. If customers are unable to cancel appointments easily – they will not bother, and would simply not show up.
- Reminders on mobile phone are ideal, but if you are not implementing any mobile interface, offer customers an option to print out a page with all the appointment details. Be sure to include the website address, the call center number, even an illustration of a refrigerator magnet... anything that would help the customer remember the appointment and what to do if it needs to be canceled or re-scheduled.

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