eltropy

DATASHEET - APPOINTMENT MANAGEMENT

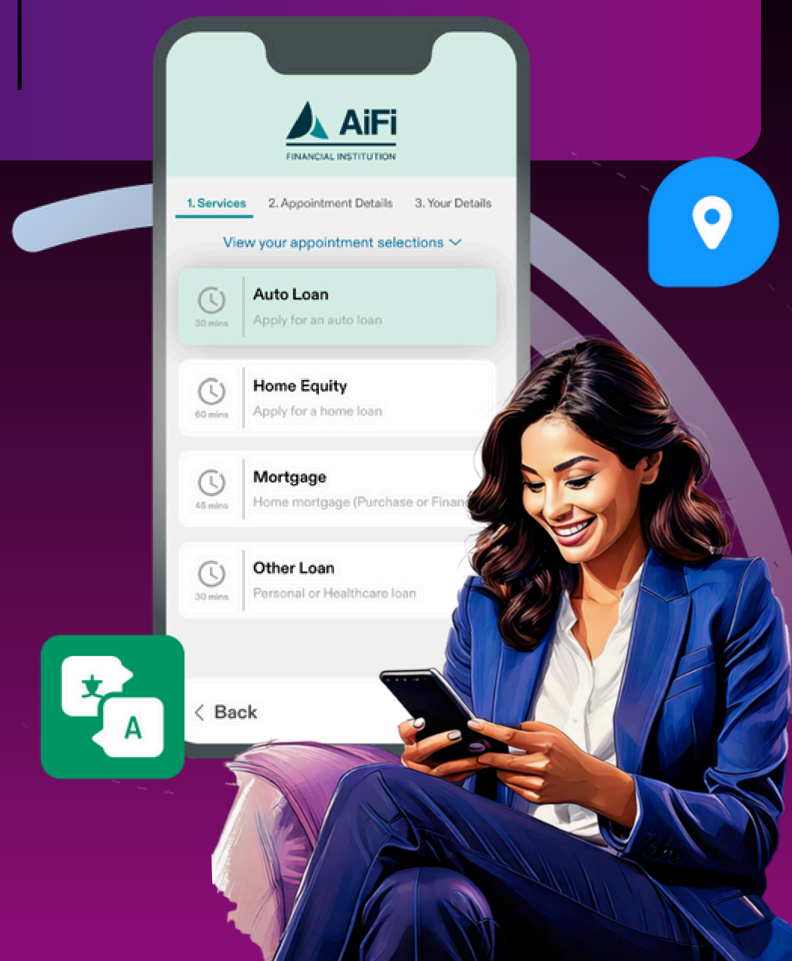
Simplify Appointment Bookings

Eltropy Appointment Management is a full-featured end-to-end appointment management solution designed for Community Financial Institutions (CFIs).

- Support for multiple branches and services
- Integration with Google & Outlook Calendars
- Ability to view and book from team availability calendar
- Allow agent to accept or reject appointments during working hours
- Skill-based routing to assign bookings to users with the right services & language skills
- Auto-adjust appointment availability based on minimum staffing thresholds.
- Automatically distribute bookings to available agents during offline hours
- Allow customers to choose communication channels
- Configurable automated text and email reminders
- Follow-up with text and email links to survey or online reviews
- Send personalized links to consumers via text

Enhance the efficiency of your in-branch and virtual video and phone appointments. Easily configure service categories, specific services, branches, appointment channels, durations, and more, all through a user-friendly interface already familiar to users. Integrate with your existing calendar (Outlook or Google) for seamless two-way synchronization.

Customize pre- and post-appointment messaging to align with your brand. Set up reminders for both staff and consumers to minimize no-shows. Additionally, it allows consumers to choose their preferred language for service.



Benefits

Improve NPS Score

Make it easy for consumers to set up appointments with minimal back-and-forth communication.

An easy-to-use appointment scheduling UX that allows consumers to use their desktop or mobile devices to set appointments.

Allow consumers to set appointments with any qualified user. Consumers can also select the language of their choice for appointments.

Smarter Agent Availability Management

Agents set their hours, managers stay in control, all synced with Outlook, Google Calendar, and Exchange for conflict-free scheduling.

Lift Conversion Rates

Using skill-based routing, we can match consumers with the perfect agents who can best serve the clients.

Allow Contact Center Agents to set up meetings with Loan Officers and other Subject Matter Experts (SMEs) seamlessly.

Reduce No-Shows

Easily incorporate timely reminders via text and/or email to prevent no-shows.

Use video meetings with consumers who can't make it to the branch.

Optimize Workforce

Use booking analytics insights to see workforce utilization and make necessary optimization decisions.

Reduce Cost

Centralize loan officers, financial advisors, notary officers and other SMEs and make them available via virtual or in-branch video meetings.

Prevent downtime for SMEs by providing smart reminders to consumers and reducing no-shows.

Keep Call Records Clean & Current

Branch Managers can now mark ongoing calls as *Complete* from the lobby dashboard and get alerts for appointments that weren't marked as completed or canceled. It's a simple way to keep queue statuses accurate, reports clean, and contact histories up-to-date, in real-time, with proper access controls.

3x
higher close ratio

23%
drop in n-show

13%
increase in appointments

Get Started Today

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E-AM-DS-101025

All figures provided are sourced from reputable organizations and represent typical results achieved by Eltropy users.