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10 Most Promising Appointment Scheduling Consulting/Services Companies - 2019

There are a growing number of business functions where appointment scheduling services is finding its relevance. Sales, customer services, help desk, lead capture, event registration, employee reporting—the list is endless. The one key area where appointment scheduling service has found high acceptance is healthcare. A hassle-free navigation of the health system enabled through swift appointment scheduling mechanism can bring a world of good to the patients. The entire healthcare ecosystem, including patients, physicians, specialists, and payers, can communicate on time and maintain a fluid workflow with quality healthcare delivery being the outcome. Dedicated teams carrying out prompt follow-ups results in breaking down of traditional silos and increasing the accountability of the diverse stakeholders in any industry. Customers can be in the comfort of their home while the appointment scheduling teams orchestrate the coordination between them and the businesses for maximum experience.

In the age of digital transformation, change management has become a common theme across organizations, and with an appropriate appointment scheduling partner, businesses can better focus on transformation. While the operations teams care for the customer experience, the digital platforms with payment integration simplify transaction completion. Modern appointment scheduling services providers can customize the scheduling solutions and tools based on the clients' branding needs. They can also personalize the settings for the end users to add the appointment to their personal calendars to minimize the risk of a no-show.

To help CIOs navigate through the list of top performing appointment scheduling consulting/services companies, our distinguished selection panel, comprising CEOs, CIOs and VCs, industry analysts and the editorial board of CIOReview narrowed the 10 most promising appointment scheduling consulting/services companies that exhibit competence in providing efficient services.

We present to you CIOReview's "10 Most Promising Appointment Scheduling Consulting/Services Companies - 2019."



Company:
JOLEADO Systems

Description:
JOLEADO is a web services company, dedicated to the productivity of its customers using Live and Automated Chat tools as a window into the CRM

Key Person:
Michael Emaus
Director User Experience

Website:
joleadosystem.com

JOLEADO Systems

The Future of AI is Human

"The future of AI is human," says Michael Emaus, Director of User Experience, JOLEADO Systems. "When live chat engages on a human level, customers engage on an emotional level—they commit."

In 2019, the early evolution of the chatbot has taken on a non-human and manipulative approach to getting the lead to trust the experience. The long and short of it being that chatbots feel far too artificial. Consumers often mistake chatbots as spam and disregard them. Furthermore, they are not fully practical; today's AI chatbots (and consequently sales reps) often squander their time on unqualified leads, due to the inability to differentiate who is ready to buy and who is not.

JOLEADO approaches online sales as a compromise between the human experience and the automated chatbot. JOLEADO replaces the dehumanizing online submittal

form with the ultimate sales funnel incorporating automation while building commitment and defining clear next steps.

The ultimate gain JOLEADO achieves is a measurable increase in conversion ratios and closure rates using the soft psychology of live chat to build commitment.

Qualified leads are defined by a greater commitment and this is demonstrated by the prospect providing more information, booking an appointment, or even agreeing to a down-payment. These commitment indicators distinguish a lead from just 'looking to buy' to 'I am ready to buy'. In the digital world, sales funnels/CRMs often get bogged down with leads that never mature to a sale, pulling valuable resources from serious customers.

JOLEADO's work within the auto industry has proven this concept; successful auto dealerships know that a proven Business Development Culture

(BDC) formula is key in pushing a lead to an appointment, which will show up and translate into a sale. JOLEADO is your digital BDC that brings AI to the process.

JOLEADO's recent pilot program with Champlain Chevrolet—as well as other independent auto dealers—has proven a huge success. A whopping 68% of respondents scheduled an appointment—AFTER providing their approval profile. JOLEADO's leads are warm, closable prospects—substantially superior to an online form of any type.



In a recent Dealers United blog, professionals in the auto industry listed how BDC representatives should be measured, and with what metrics. We asked Dan Companion, Business Manager / I.T. Director from Champlain Chevrolet to compare those to the JOLEADO experience:

- a) average response time (*JOLEADO responds instantly*)
- b) average # of days it took per prospect from lead to close (*JOLEADO lead is ready to buy*)
- c) # of new prospects received this month (*JOLEADO's custom call-to-action feature gets the right message to engage the customer*)
- f) # of appointments set - *JOLEADO achieved an average of 68% appointments set for us*
- g) # of shows - *JOLEADO's follow-up system keeps the customer engaged*

h) # of closed - *JOLEADO's process is the highest level of lead engagement, HOT leads that show and close!*

JOLEADO is your digital BDC waiting on your website ready to engage the customer and book that appointment. "JOLEADO is not selling live chat—we are facilitating sales outcomes," Michael reveals.

The system accomplishes this success through a set of enterprise-level features, incorporated directly into the live chat experience; each designed to target consumer interests. For example, sales reps have access to a custom template library with the ability to gather requirements, generate quotes, create appointments in a shared calendar, schedule automated follow-ups and reminders, take payments, offer promotional incentives, and more.

But of course, AI chatbots have the ability to capture large volumes of leads without manpower distinctly because human-driven live chat systems often lack similar systematic capability. We are all familiar with the infamous live chat approach: "Currently offline! Enter your details and we will get back to you soon!" This strategy remains polarizing to customers, and results in lost opportunities. Alternatively, JOLEADO views offline hours as a premier selling opportunity. The JOLEADO system enables busy sales teams to continue working far beyond business hours by using a 'hybrid' sales rep/automated chat formula. This means that a sales team can opt to engage in a live chat during working hours, and at the end of their day, the system transforms the live chat call-to-action into a specific selling outcome.

The automated system differentiates itself from chatbots by using the same comprehensive set of pre-determined templates, empowering users with the opportunity to create a genuine experience for their customers, while still using the enterprise level features of the live chat experience. One large advantage of the automated chat is the cutting-edge concept of auto-quoting. The automated system can be set up to generate a contact and/or project record, task operations and even quote based on the response of the live chat customer experience.

Thus, JOLEADO sales reps quote more often and with ease. This saves valuable time and effort. Emaus reiterates that these advantages are crucial, especially for "B2B and B2C companies that take an enormous amount of time to quote; as a result, they quote sparingly." JOLEADO empowers sales teams to stop spending hours on unqualified prospects and

utilize their talents specifically on the most committed leads—and in turn, increase closure rates.

The 'hybrid' system can be utilized during working hours as well. If all available sales reps are busy working with customers and someone new enters a JOLEADO chat, the hybrid system asks, "would you like to wait for the next available rep, or continue with our automated system?" If the customer opts into the automated system, they are transitioned to the automated chat funnel. This enables a business to capture visitors' interest, build trust, encourage them with benefits, deliver a better experience, and make effective decisions to reduce the friction in the entire sales pipeline; regardless of staff size.

Even more, JOLEADO is no stranger to the enterprise ecosystem determined by scalable results and managerial flexibility. For example, a franchise with 2100 location websites—all independent—can deploy a one-time setup to all 2100 stores. Cascade Engineering, a raw material manufacturing company, leveraged JOLEADO's cost worksheet and calendaring system to enable supply chain partners to provide quotes promptly, which led to improving Cascade's customer expectations.

JOLEADO's experience shows that during a meaningful chat interaction, visitors will provide quality responses—even sensitive information, safely captured through an encrypted connection.

Next steps are scheduled. Deals are closed. The results speak for themselves.

Lastly, while other chatbots need to be re-programmed to integrate with third-party apps, JOLEADO has carefully built its live chat platform from the ground up, having back-office functions as the substrate. The richness of the back office allows JOLEADO to add new features into the live chat experience and integrate seamlessly with other third-party systems. The chat platform integrates content management, task management, project management, scheduling, and CRM, allowing clients to manage their sales in a single window, comprehensively.

In conclusion, Michael reinstates: "By humanizing the chat experience with tailored hybrid chat responses, JOLEADO is focused on measurably increasing qualified lead volumes and improving sales conversion rates." No matter the company, no matter what market, no matter which consumers—JOLEADO can further the customer and sales team experiences to fundamentally increase closure rates and conversion ratios.



Michael Emaus,
 Director User Experience

