Customer Flow Management with a Round Robin Queuing System

Efficiently Managing Walk-ins and Appointments

Introduction

Lowering Lobby Wait Time and Providing an Improved Customer Experience

Managing lobby wait times for clients can present a significant challenge for certain organizations. If part of your organization's business processes require one-on-one client meetings with specific staff members it often leads to lobby wait time issues. Other logistical problems arise when certain client issues have to be directed to specific staff members, when accepting walk-in and appointment clients and when encounter times can be expanded.

In order to lower lobby wait times and improve the customer experience some innovative offices are utilizing a combination of online scheduling and an arrival management system. An integrated online appointment scheduling system can assist in regulating the client flow and directing it away from typical peak demand times. However, once clients show up in the lobby you need to rapidly create and modify staff assignments to adjust to the live activity. An arrival management system that can track appointments, walk-ins, live staff availability and notifications can assisting lowering lobby wait times. Combined, these two systems can significantly lower lobby wait times, improve the customer experience and lower staff stress levels.

This article examines some of the logical issues in operating a center that must process clients to meet with service providers on a one-on-one basis. This article is intended for Customer Service Managers, Lobby Managers, Service Center Supervisors, logistical support staff and others charged with managing client arrivals.

Walk-in and appointment service centers are seen in a variety of industries. What they share in common is a centralized area focused on providing clients access to staff acting as service providers.

Dramatic peak volumes of clients can challenge any system.

These staff members may be charged with taking notes during the encounter or interview, or processing forms

Round Robin Scheduling

Some of the challenges faced in operating a customer service center include managing a wide variety of demand levels for services. Peak times can result in dramatic increases of clients accessing the center. Challenges include managing appointments, walk-ins, matching clients with the best choice of staff members, and queuing of clients when the staff member is available to meet with them.

To deal with the logistical problems some innovative institutions are implementing a Round Robin scheduling system. The Round Robin system is a fairly straight forward in approach. Upon check-in clients are determined to be either walk-in clients, clients with appointments with specific providers or clients with non-specific appointments. Some clients are matched with providers based on an algorithm defined by the institution. Then clients are placed in a waiting queue until the assigned provider is available.

Clients with Appointments

Round Robin systems provide a structure to more easily manage walk-in clients and those with appointments.

Rather than struggle with phone calls and emails to negotiate an appointment time the more client friendly method is to offer clients online access to view and book available appointment times. Once the client logs into the client portal they have access to the online appointment scheduling system.

If the provider has been assigned the client simply views the assigned providers available schedule and reserves their choice of time. If the client's provider has not been assigned, it can get a little more challenging. Some approaches allow the client to schedule with an initial provider that may assign them to a different provider. Other processes require the system to choose the provider based on the service type requested, primary language or other parameters.

Matching

A typical service center will have multiple providers, each with different knowledge bases and backgrounds. In managing online clients' appointment scheduling activity the desire is to match the client with the most potentially beneficial provider.

During the appointment scheduling process the institution will have made a choice; either allow the client to book with a staff provider as an introduction or allow the system to select the best provider for the specific client or service type. Finding the most beneficial provider may involve matching multiple parameters.

A more specialized method may involve selecting an provider based on preselected parameters. The selection criteria are set by the individual institution however some common criteria include;

- The client's primary language
- The type of service
- Gender
- Special interest

Today, automated online scheduling tools can use multiple customized criteria to match a client to an available provider.

Once the provider is selected, the client chooses an available appointment time and books the appointment. After the booking the client should receive an email confirmation and options to receive email reminders. Some institutions are starting to employ SMS text messages and automated voice reminders.

Walk-in Clients

Some centers accept walk-in clients. Although it is convenient for clients, accepting walk-ins presents some logistical problems for the service center. In order to adequately manage walk-ins the center needs to deal with;

- Current arriving clients with appointments
- Unknown volumes of clients seeking service

- Matching the walk-in client with the best currently available provider
- Monitoring the providers' schedules
- Monitoring the providers' live availability (busy or free to meet with a client)
- Managing wait times
- Notifying the service staff that the next client has arrived
- Notifying the appropriate client when a matched provider is available

Managing all of these issues at once, particularly during peak volume periods may be asking a lot from the support staff.

Checking In

The check-in process needs to be able to manage walk-in clients and those clients with appointments. For clients with appointments with a specific provider it is simply a matter of monitoring the specified provider's availability or notifying them that the client has arrived.

Some systems allow the receptionist to monitor instant availability from an arrival "dashboard". When the provider has completed a visit and has their availability restored, they may change their status to "Open" signaling that they are ready to take the next client. This change of status shows up on the dashboard. The receptionist may now queue the client via a variety of methods that they are ready to be taken back.

For those clients with appointments that do not have an assigned provider and for walk-in clients the processing is slightly different. Once they check-in they may be put through a matching algorithm that severs to match them to what the system determines to be the best matching available provider. Once they have been matched they then enter the waiting queue. The waiting queue holds the client until the selected provider is available.

SMS text messaging offers a convenient and private way to queue clients to availablity.

Queuing Clients

Once the selected provider becomes available the client needs to be informed that they may now be seen. Several options exist;

From the dashboard the receptionist is alerted that the provider is available and has a matching client in the waiting queue. The receptionist or the system needs to alert the client that the provider is ready to see them. There are several options to notify the client. Some of these include;

- Queuing by email
- SMS text message queuing
- Queuing from a video screen
- Queuing by automated phone call.

For a graphical view of the Round Robin system please see the next page.

EZappt™

Round Robin Queuing

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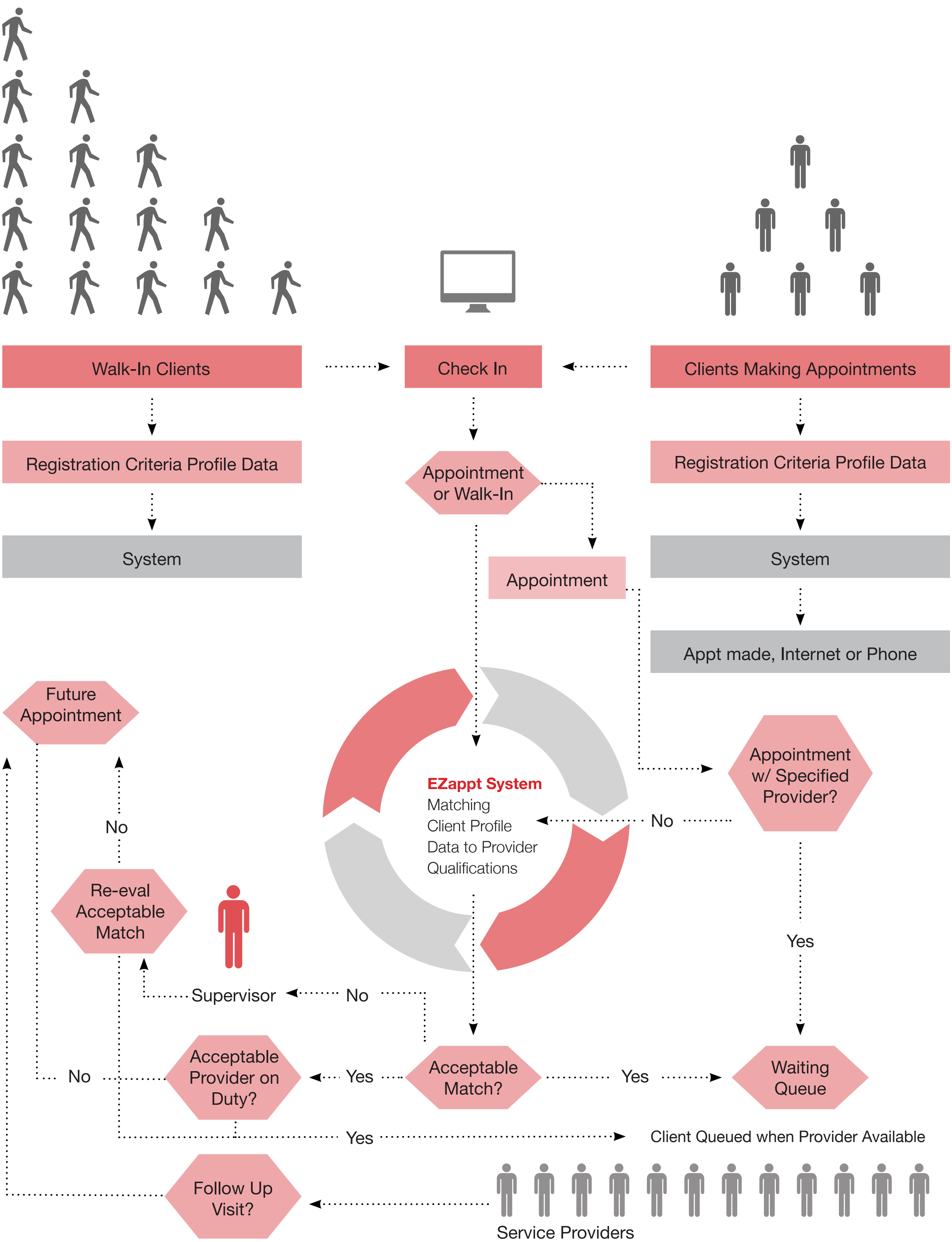

Putting it All Together

Timely access to service providers is often regarded as the most important factor in improving customer service. The combination of online appointments, walk-in visits, matching and Round Robin queuing gives clients' excellent and timely access to providers.

Key Benefits

A number of significant benefits exist for all parties involved in making and managing provider appointments when utilizing an appointment management system.

Significant benefits for clients, providers, and staff

For Clients

If employed completely, the combined management system offers clients easier access and lower wait times to access services provided in the service center. Clients have a convenient, online method of viewing an providers available schedule and booking an appointment. Clients are less likely to miss an advising opportunity with confirmations, reminders and queuing that may be delivered by email, SMS text or automated voice.

For Service Provider Staff

Providers have an enterprise system to post and manage their available schedule. During they may post their live availability to the system. When they have opened live availability a client may be queued to see them by the receptionist or fully automatically. Starting a visit the provider will show as unavailable to the receptionist's dashboard. During the visit the provider may upload any documents, update case status, designate problem types, create progress notes, create follow up instructions, and book future appointments.

For Staff

With the new system the service center staff now has a powerful new tool to manage arrivals, accept appointments, walk-ins, assigning of providers, monitoring providers instant availability and queuing the client when the provider is ready to receive the client. Staff may view a dashboard that shows the day's appointment scheduling and walk-in activity as well as live provider availability.

Administrators may view the live and historical activity, by client or by provider. They also may access reports on servicing activity by department, by provider and by client. Administrative staff may view historical data and spot trends in appointment activity. Staff may also pull standard and customized reports, on demand or on a predefined delivery schedule. Based on role security settings staff may be able to drill down to see appointment notes and other details.

What to Look for in a Solutions Provider

Experience is Key

When selecting a solutions provider to supply an appointment management system, be sure to consider the following;

Experience
Look for experience in supplying client provider scheduling in large multi-centered institutions as proof the system can manage your needs. Consider the various integrations that the system has with third party

Arrival Management Module
If your organization utilizes an advising center or takes walk-in appointments having an arrival management module, especially one with Round Robin assignments, can make life easier for clients, staff and providers. The arrival management solution should be able to allow a receptionist to view statuses of all arrivals, scheduled appointments, provide matching, and the monitoring the live availability of each provider and queuing features.

Queuing
Queuing services should be included as feature that is available via multiple formats such as email, LCD view screen, SMS text and perhaps even voice reminders.

Flexible platform
SaaS (advanced cloud or dedicated) with SAS 70 type II compliance or installed. Conditions may change; make sure the solutions provider can provide any option you may need, for now and in the future.

Recurring appointments
Providers or clients may wish to establish a regular pattern of repeating appointments. If the system allows recurring appointments clients and providers have a tool to easily manage more complex scheduling tasks.

Role Security
The system should have role based security to allow administrative staff to have full access to view live and historical appointment availability and usage. Administrative staff also should have access to various reports to monitor appointment scheduling activity by client, college and provider.

Confirmations and Reminders
Keeping clients on time; at a set schedule prior to the appointment time the client will receive reminders about the appointment that include the location, a map and some general advising rules. The reminders include a link that can take them back to the system to review the appointment details and allows the ability to cancel or reschedule the appointment based on University rules.

The EZappt Advantage

Experience

EZappt has experience with all types of institutions including large multi-centered organizations. EZappt has integrated with the most common systems to allow single sign on and other features. EZappt clients include; Fresno County Dept. of Social Services, Arizona State University, the State of California Board of Equalization, and others.

Client Self Service Scheduling

EZappt includes a robust enterprise grade appointment scheduling platform. The scheduling engine is highly flexible and capable of managing multiple departments and locations. EZappt includes a client confirmations and alerts via multiple formats including SMS text and voice notification.

Transaction Records

The service details record gives providers and staff a comprehensive record of the client. The benefits of creating and maintaining an electronic service record are significant for the client, providers and the administrative staff. EZappt's customizable template based system allows rapid documentation of interactions, follow up instructions. allows uploading of documents and pulling data from other systems.

Confirmations and Reminders

EZappt's confirmation and reminder system creates automated messages for any change in appointment scheduling. EZappt allows users to accept messages as email, SMS text messages and/or automated voice reminders. All users may easily sync their appointments into Outlook, iCal, Windows Live, Facebook and/or Google Calendar.

Flexible Platform

The EZappt Appointment and Arrival Management System is available as a secure SaaS (Software as a Service) fully hosted solution or as an installed solution on your organization's infrastructure.

Contact

To take the first step towards managing your client provider appointments, please call: 888-709-2778 or email RFQ@ezappt.com

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