**Solving Appointment/Arrival Management Dilemmas
with Technology: for State Sales and Use Tax Agencies**

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Introduction

If your organization deals with scheduling appointments and tracking client cases, you understand the difficulties in managing the work flow while keeping the system operating. Challenging labor intensive tasks include talking to clients, negotiating times, booking appointments, rescheduling, and managing the work flow once they arrive. If your agency discovers it is having difficulty managing appointments and arrival times efficiently, then perhaps moving from a paper based solution to an online solution can provide an answer to this problem. This white paper is designed to show how an organization moving to an online software system can greatly lower appointment and management costs while at the same time provide improved customer service.

Problem Statement

Historically, state sales and use tax agencies have had problems managing appointments and arrival times. Problems that arise might include: handling of phone calls, paper documentation, having visibility from an administrator's point of view and overhead costs. In managing phone calls during the day, agency receptionists are inundated with clients (business owners) trying to make an appointment, cancel an existing appointment or rescheduling an appointment. Once the appointment has been made, dealing with additional paper or constantly sending Excel documents back and forth expends considerable time and resources. It also results in a disjointed, error prone system. To manage appointments efficiently the client, assigned staff member and management need to be on

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the same page. Clients need to know when to arrive. Staff members need visibility of their booked and open time and management simply needs visibility into how the overall system is operating.

One agency we followed was a state use tax licensing agency with 23 local offices. The agency needed to schedule clients for individual appointments with Use Tax staff. Complicating the matter, the agency also had to mange walk-in clients while servicing clients with appointments. Problems started showing up immediately. Just managing the scheduling issue of phone calls was enough to hire a staff. When the office opened each day an unknown number of walk-in clients would be thrown in to the mix. Initially, the organization started managing the appointments with paper, and later by passing around electronic documents. These methods offered some limited help in managing the appointments but did not address other workday challenges of efficiently managing client flow. Additional challenges included giving confirmations and reminders to clients. Once the client arrived, the receptionist had no way of knowing moment by moment when staff were available to take their next appointment or to help with walk-in clients.

The agency's solution to the problem was an online system to assist with appointments and case management. The software allows for the state sales and use tax agency customers (business owners) to go online and view the available schedule, book appointments, cancel and reschedule appointments.

The system has an arrival management solution that provides efficient allocation of staff.

Agency management now has a tool to monitor live scheduling activity throughout the organization.

Customers can specify if they need any language assistance all through a single user interface that is tailored to fit the exact needs of the sales and use tax agency. The system also manages the appointment throughout its lifecycle. The system includes automatic email confirmations and reminders that sync to Microsoft Outlook and Google calendar.

When the day of the appointment comes the customer arrives at the agency and checks in with the receptionist. The receptionist places the client in a waiting queue. The system has an arrival management solution that provides efficient allocation of staff and facility resources. The "Workbench" allows the receptionist to see all arrivals including those with appointments and walk-ins. On the same screen the receptionist can also see the live availability of each representative. This allows the receptionist to quickly match the available representative with the most appropriate client. Once the representative is seated with the customer he or she can record any notes, upload any documents and complete the case.

Agency management now has a tool to monitor live scheduling activity throughout the organization. They can view current activity, zero in on any evolving trends in activity levels, and drill down to see specific information on each individual representative, customer and transaction. Nine custom reports were created for the agency. They also have access to standard reports and the EZappt quick search feature that supplies many ad hoc reporting services.

TABLE 1

PHONE CALL DURATION (IN MINUTES) FOR VARIOUS TIMES OF DAY

	8a – 12p	12p – 4p
Average	4.85	4.68
Std. Dev	4.84	4.58

(Fette, 2005)

Previously, appointments were taken over the phone.

ROI

The School of Computer Science at Carnegie Mellon University completed a research study on the average call length at various times of the day. It turns out that the average call is about five minutes. If you are employing staff at $20 per hour it is likely that well performing staff members can each schedule ten appointments per hour. That makes the cost of scheduling an appointment about two dollars each. Depending on volume, the online system can manage the same tasks for a small fraction of the cost. This represents a great return on investment.

Previous Options

The options that agencies previously adopted were to take appointments, cancellations and rescheduled appointments over the phone, agencies also adopted the paper calendar for each service representative who would see the clients or business owners. State agencies would have no arrival management tool to calculate client wait times. Lastly, reports would have to be generated manually by gathering all calendars and entering the pertinent information into a spreadsheet. This option was time consuming, confusing, and inefficient.

EZappt's Solution

EZappt, aka, "Easy Appointment", provides online scheduling and tracking systems for enterprise grade customers such as state sales and use tax agencies. With the EZappt system agencies can effectively manage appointments, arrival times and track client's progress. Some

Appointment Scheduling Cost

Cost

Cost Savings

- W/O EZappt
- W/EZappt

1000   2500   5000   7500   10000
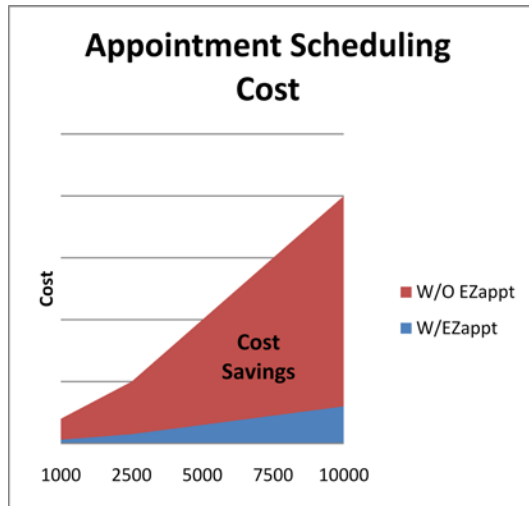
Customers can view appointment history, schedule, reschedule and cancel appointments.

of the many benefits of the EZappt solution include: reduced phone calls by having clients book online, effective and efficient staff allocation and lower client wait times. The system also allows oversight by central and local (branch) managers who may obtain several measures of the agency's performance. By adopting the new method of managing appointments and arrival times, agencies can save 75% or more on the cost of each appointment booked.

Booking 24/7

A key to success of the online system is enabling customers to go online, register, and book their appointments 24 hours a day 7 days a week. Once activated, the agency begins actively reducing the number of incoming phone calls. Even though your physical office is open only 8 hours a day, your virtual customer service office is open 24/7/365.

Customer Friendly

Once registered and logged in, customers have a portal to view history, as well as schedule and reschedule appointments. The customer receives email confirmations and reminders triggered from every change in their schedule. The messaging system works with many common scheduling tools such as Outlook and Google Calendar.

Peak Demand/Peak Performance

Do your clients space their appointment requests throughout the day to accommodate your staff? If your agency operates like most organizations there will be peak usage times. Peak

EZappt system can manage spikes in demand.

appointment request times may spike early in the morning, or even early evening. Dramatic spikes in demand can happen after email blasts or media exposure. If a local agency is managing 1000 appointments a month, how would they manage 1000 appointment requests in a minute? How large would the staff need to be to manage such requests? Is the customer experience going to suffer? The EZappt system can manage spikes in demand, over 1000 per minute, without any staffing changes and delivers a consistently convenient customer experience every time.

Easily Deployed

The online system can be deployed in two ways; hosted or installed. To deliver a turnkey hosted solution EZappt hosts the software from a SAS 70 compliant, biometrically secured datacenter. State sales and use tax agencies pay a relatively low set up fee and subscribe to the system on a monthly basis (Software as a Service, SaaS). The second option involves installing a version of the software on the organization's infrastructure. Either way, agencies can benefit from the full range of system features and functions. Further refinement may be obtained by utilizing EZappt professional services to integrate to the organizations current databases and software.

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Implementation

EZappt starts with our robust online registration and scheduling engine. After carefully evaluating the needs of

the organization, EZappt produces the implementation plan which details all functions, features and user interfaces necessary. EZappt then configures each of the hundreds of optional configurations in our robust online registration and scheduling engine to match the organization's needs. The result is in delivering turnkey product that fulfills all the needs of the organization. EZappt has employed this process to provide solutions to hundreds of private and public businesses as well as state, county and local governments.

EZappt's robust .NET enterprise grade appointment and event software is 100% web-based AND 99+% uptime guaranteed, meaning you can use it **anytime, anywhere** you access the Internet. EZappt supports Internet Explorer 6+, Fire Fox 2+, Opera, Safari, Google, and Google Chrome browsers. Our product has a graphically pleasing standard user interface that can be fully customized as needed.

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Summary

State sales and use tax agencies who have not adopted an online software system to handle appointments and arrival management face many operational challenges. EZappt can supply an online scheduling and tracking system tailored to the way your organization operates. Agencies benefit by saving costs, improving customer service, while offering new levels of visibility to management. Let EZappt know when it is time for your agency to streamline your processes by moving away from your paper based solution to an online software solution.

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References

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