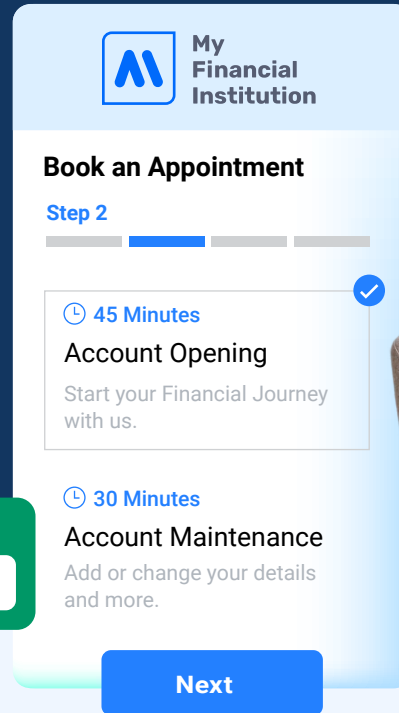




# Appointment Management

## Simplify Appointment Bookings



Eltropy Appointment Management module is a full-featured end-to-end appointment management solution designed for Credit Unions, Community Banks and other financial institutions.

Bring new efficiencies to your In-Branch and Virtual Video and Phone Appointments with the Eltropy Appointment Management module—a part of Eltropy All-In-One Digital Communications platform.

Set up service categories, services & branches, appointment channels, appointment durations, and much more, all from the UX already familiar to users. Connect with your existing calendar (Outlook or Google) for two-way sync.

Control pre and post appointment messaging to fit your brand. Set reminders for staff and members to prevent no-shows. Allow members to select their preferred language to be serviced in.



Support for multiple branches and services



Integration with Google & Outlook Calendars



Ability to view & book from team availability calendar



Skill Based Routing to assign bookings to users with the right services & language skills.



Allow agent to accept or reject appointments during working hours



Automatically distribute bookings to available agents during offline hours



Allow customers to choose channels (Video, Voice, In person) and service.



Configurable automated Text and email reminders



Follow-up with Text and email links to survey or online reviews



Send Personalized Links to members via Text from Eltropy Messenger

# Benefits

## Improve NPS Score

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

An easy-to-use appointment scheduling UX that integrates into your website with your branding that Members can use their desktop or mobile devices to set appointments.

Allow members to set appointments with any qualified Users, or select their favorite one. (Members can also select the language of their choice for the appointments)

## Lift Conversion Rates

Using Skill Based Routing, match members with perfect users that can best serve the customer.

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

## Reduce No-shows

Easily incorporate timely reminders via Text and/or Email to prevent no-shows.

Use Video meetings with members that can't make it to the branch.

## Reduce Cost

Centralize loan officers, financial advisors, notary officers and other Subject Matter Experts (SME) and make them available via virtual or in-branch video meetings.

Prevent downtime for Subject Matter Experts (SME) by smart reminders to members and reducing no show.

## Optimize Workforce

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

**3x**

Higher  
Close Ratio

**13%**

Increase in  
Appointments

**23%**

Drop in  
No-show



Book a Demo



[www.eltropy.com](http://www.eltropy.com)

