

Intelligent Appointment Scheduling for Salesforce

Connect with customers in a whole new way

Scheduler for Salesforce helps you seamlessly manage high touch personalized interactions with every prospect and customer throughout the entire buyer journey. Drive more qualified leads, expedite sales cycles, increase pipeline, and retain more customers while never leaving Salesforce.

Drive meaningful customer interactions at every stage – through each department

MARKETING

Drive attributable marketing qualified leads directly to the right person or people on your sales team. Book confirmed meetings from your inbound and outbound marketing programs. Turn your website, emails, digital ads, PPC and social media programs into appointment generating machines.

SALES

Generate more qualified opportunities, increase pipeline, and expedite sales cycles. Schedule meetings with prospects and customers instantly through sales engagement platforms, directly through emails, or from right within the Salesforce record. All activities are captured in Salesforce eliminating the need for manual data entry.

SUCCESS

Expedite deployments and increase customer lifetime value. Automatically offer on-boarding meetings once opportunities are closed in Salesforce. Proactively offer meetings for customer milestone and account check-ins. Integrate with Salesforce Cases to easily schedule meetings to resolve support inquiries and boost customer satisfaction.

**Connect with
customers on
every channel.
Let them decide
how to engage.**

-  Website Scheduling
-  Social Scheduling
-  Mobile Scheduling
-  Call Center Scheduling
-  Email Scheduling

WHO IT'S FOR

-  Financial Services
-  Software and Technology
-  Service Companies
-  Higher Education

KEY FEATURES AND BENEFITS

Schedule meetings without the back and forth

Easily see team availability and schedule appointments with prospects and customers right from their lead, contact, or person record in Salesforce. Prefer to schedule later? Invitations can be sent instantly from the record allowing the prospect or customer to schedule at their leisure from any device at any time and view true live availability from all required attendees. They can schedule the right meeting with the right staff member on your team at a date and time your customer chooses from their phone, tablet, or desktop.



KEY FEATURES AND BENEFITS (continued)

Meet with a group – or 1 on 1

Easily schedule meetings 1-on-1 or with multiple people. Available appointment times reflect availability for all required participants on one consolidated calendar. Every invited attendee receives confirmation and reminder notifications and appointments are automatically added directly to their Salesforce and personal calendar.

Book the right person for the meeting – every time

Drive prospects and clients to the right team members from one easy to share calendar with Advanced Appointment Routing and Smart Matching. For inbound new leads, ask custom questions such as product interest, location, business size, and more to properly match the prospect and customer needs to the representative who is best qualified.

For known, targeted prospects and contacts, easily offer appointment scheduling through outbound marketing campaigns, Salesforce email templates, and prospecting cadence software. Dynamically route prospects, leads and contacts to meet with the right employee based on assignment and ownership rules from Salesforce using one intelligent scheduling link.

Always have a place to meet

Built-in web conferencing integrates with your virtual meeting platform including Zoom, GoToMeeting, Webex, and Join. me. Schedule online meetings with unique private links. Virtual room dial-in details are automatically included in your confirmation and reminder notifications.

Make double bookings a thing of the past

Sync your personal calendar availability directly with Engageware. Integrate directly with Outlook, Office 365, Exchange, Google, and Salesforce Calendar to ensure you are never double booked. Appointments automatically sync to your teams connected calendars.

Capture actionable insights

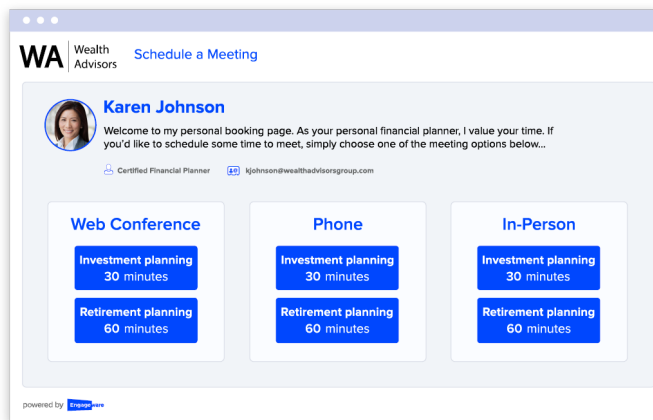
Understand the impact appointments have on leads, opportunities and customers. Appointments scheduled through Engageware are captured directly in your organization's Salesforce reporting. Review past and upcoming appointments, see appointment show rates, check-in, and start and end times associated with each appointment. Drive better business decisions by understanding the impact Intelligent Appointment Scheduling has made on your business.

Powerful alerts to reduce no-shows

Automated appointment reminders and notifications via email and text messaging greatly reduce no-shows. Engageware customers enjoy up to 90% client show rates for scheduled appointments.

Personal Booking Pages

Increase client engagement with simplified booking experiences through Scheduler for Salesforce. Personal Booking Pages empowers users to create personalized booking experiences within Salesforce that display all appointment offerings in one place without the assistance of a Salesforce Administrator. The end result is a seamless experience for clients and prospects that allows them to more easily find and select an appointment that best suits their needs whether it is face-to-face, over the phone or using a supported web conferencing provider.



WHY YOU NEED IT



4x

increase in lead conversions



45

minutes saved each week per representative



60%

decrease in back and forth calls and emails



Appointment Scheduling | Learn more at engageware.com

Engageware