Seven companies that transformed how they schedule and manage appointments using **Microsoft Bookings**

Microsoft

What you'll learn

Scheduling clients and managing their appointments efficiently not only saves businesses time and money, but it also leads to improved customer satisfaction.

This e-book looks at seven companies in different industries and regions that use Microsoft 365, had significant external or internal scheduling needs, and decided to implement Microsoft Bookings. All found the scheduling solution to be easy to deploy, customizable to their needs, and straightforward for both employees and customers to understand. Customer feedback was positive in every case.

These stories suggest ways a wide range of organizations use Microsoft Bookings, and the resulting benefits. Consider what your company may gain from deploying this powerful and customer-friendly scheduling solution.

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Companies profiled

Government agency needed appointment scheduling apps for 115 service centers

Société de l'assurance automobile

Québec

Who: Société de l'assurance automobile du Québec

Type of business: Quebec government corporation responsible for licensing drivers and vehicles and providing public auto insurance

Stats: 115 locations

What makes the company tick

"Our mission is to protect individuals against the risks inherent in use of the road and to help enforce several laws and regulations."

What it needed

Due to COVID-19, the agency needed a way for residents to schedule appointments so they are served right away and safely.

"The [scheduling app] that was easiest to set up was Bookings, which was already included in our Microsoft 365 license. We had already evaluated it and knew the solution met our requirements of security and level of service."

—Mario Blouin, Technology Enterprise Architect, Société de l'assurance automobile du Québec (SAAQ)

Business need

Quebec governmental corporation Société de l'assurance automobile du Québec (SAAQ), which provides driver's license and vehicle registration services, shut down its service centers when the province's residents were confined to their homes due to the situation resulting from COVID-19. When SAAQ planned to reopen, the corporation needed to significantly reduce the number of people standing in line or waiting inside because of physical distancing guidelines issued by public health authorities.

"We needed a solution for scheduling appointments so we could deliver our services without people waiting in line," says Richard Fortin, Director of Customer Relationships. Each of the 115 centers providing SAAQ services needed its own appointment scheduling app.

"The one that was easiest to set up was Bookings, which was already included in our Microsoft 365 license," says Mario Blouin, Technology Enterprise Architect at SAAQ.

"We had already evaluated it and knew the solution met our requirements of security and level of service."

The rollout

"In the beginning, we started with just two service centers while we learned how to use Bookings. Then we implemented the solution at the other service centers. It was very easy to implement and use," says Fortin. SAAQ's 44 service centers were all online with Bookings within two weeks, and the 71 licensing agencies that also offer SAAQ services were online three weeks later.

A Quebec citizen or business can now go to their nearest center's website where they see the Bookings self-scheduling page embedded within the main SAAQ site, choose the service they need, and select a date and time to schedule their appointment.

The rollout was a big hit, both with users (citizens) and the SAAQ call center, which uses the same Bookings calendar to schedule appointments for citizens who call in.

"Users really like that they can make an appointment and don't have to wait when they come into the service center. They receive the services as soon as they arrive," says Fortin. Previously, users came in, took a number, and waited for their number to come up on a big board.

In its first full month, Quebec citizens scheduled more than

100,000
appointments using Bookings
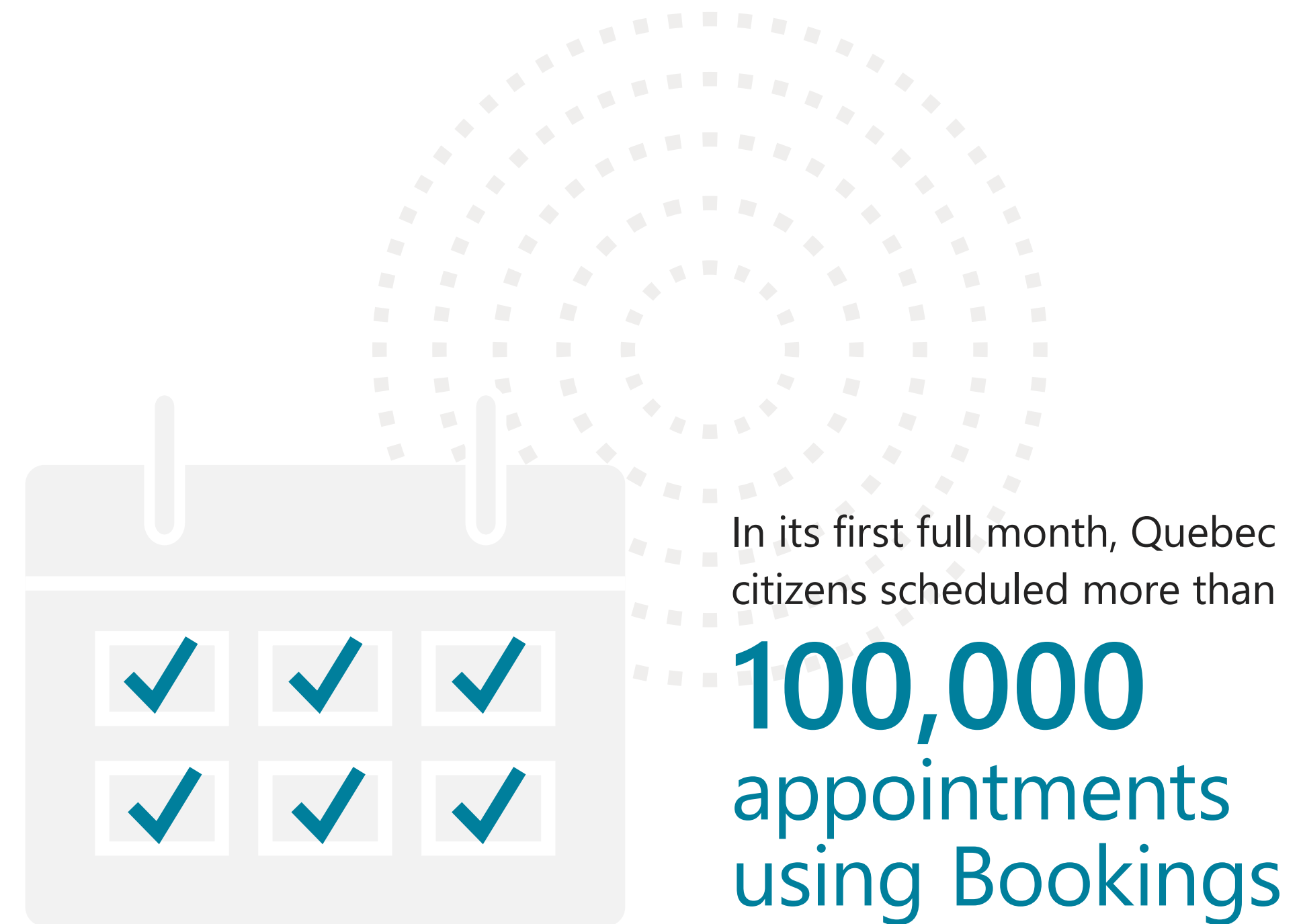
Impact

In its first full month, Quebec citizens scheduled more than 100,000 appointments using Bookings. Once someone makes an appointment, they receive an email confirmation and SAAQ officials like that they can customize that confirmation. "When they passed a law in Quebec that you need to wear a mask in public places, we were able to write, in the confirmation email, 'Don't forget your mask,'" says Fortin. The user can also reschedule or cancel the appointment online, which reduces calls into the call center and no-shows.

Both users and employees are very satisfied with Bookings. While SAAQ initially implemented Bookings to handle capacity and social distancing guidelines related to COVID-19, they plan to continue using the solution due to positive feedback and improved efficiencies. The SAAQ team has already recommended Bookings to another city agency, which also needed a scheduling app for citizens to book appointments.

"The success story of this implementation is being able to build out a solution and implement a new solution in only a few days without it costing a lot of money," says Blouin.

Takeaways

Technology allows businesses to rethink work processes and become efficient in ways that save a significant amount of time and effort. Does your organization have scheduling procedures that could be made more efficient?

Global insurance company discovered efficient way for customers to schedule online appointments

Stories:

Who: Zurich Insurance

Type of business: Insurance company that provides property, casualty, and life insurance products and services to individuals, small businesses, mid-sized and large companies, and multinational corporations

Stats: Serves more than 215 countries and territories

What makes the company tick
"Putting 'you' at the center of all we do."

What it needed
An easy way for customers to book appointments online

"Bookings doesn't require a lot of people or other resources to set up, and the benefits are big. That, to me, is the description of a perfect application."

—Raid El Badarin-Deriy, Digital Workplace Technical Lead, Zurich Insurance, Germany

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Business need

Zurich, one of the 10 leading insurers in Germany, is part of the Zurich Insurance Group, which offers insurance products and services in 215 countries and territories worldwide. With its strong customer focus, Zurich in Germany needed a way for customers to easily schedule online appointments with their local sales organization. Whether a new or existing customer preferred an online consultation or in-person meeting, the goal was to make scheduling it fast and easy.

Prior to implementing Bookings, the company had been using a third-party scheduling app which was costly and did not integrate with Microsoft 365 or Outlook, says Raid El Badarin-Deriy, Digital Workplace Technical Lead at Zurich Insurance, Germany.

Zurich is also interested in trying out an online booking app at its Customer Service Centers. "In Germany, our Customer Service Centers receive more than 2,000 phone calls per day," explains El Badarin-Deriy. "Our customers and agents can save a lot of time by using a booking app. "

The company decided to try Microsoft Bookings. "It was very surprising that this great app is included in Microsoft 365 at no extra cost," he says. "And the most important thing from an insurance company's perspective is security." It liked that it was integrated with and a part of Microsoft 365, which has enhanced security capabilities it was already familiar with. Leadership also liked that it worked, right out of the box, with the company's existing Microsoft applications.

The rollout

El Badarin-Deriy says the staff didn't receive—or need—any training on setting up Bookings. When employees explored the solution, it only took "a few minutes to see exactly how it works" and they were ready to get started.

Because Bookings is entirely online, customers can access the scheduling tool from any device via a web browser, making it simple to use. "A customer just clicks on the URL, chooses the service they want and the appointment time, adds their name and email address, and that's it. They can complete an appointment in less than 20 seconds. If it's an online consultation, they automatically get an invite for a Teams meeting or else they get a meeting reminder to see a person at an agency."

In the first week of the pilot period, many customers scheduled online appointments. The number of bookings quickly increased in subsequent weeks as more locations rolled out the new scheduling tool. Feedback from both existing and new customers was positive, meaning Bookings is contributing positively to both the loyalty of existing customers and the building of strong relationships with new ones.

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Impact

Soon, Zurich Insurance will roll out Microsoft Bookings across all of its sites in Germany. "That's more than 1,000 agencies and 1,000 sales locations," says El Badarin-Deriy. "Each location will have its own Bookings site." After that, the company will introduce the web app throughout Switzerland, Italy, and Argentina.

"When we meet with teams and tell them they only need some legal text and a team to implement the new sites, they say, 'That's it?' They're expecting a big project with a lot of people involved. But Bookings doesn't require a lot of people or other resources to set up, and the benefits are big," he says. "That, to me, is the description of a perfect application."

The company will also start using the Bookings app in Microsoft Teams internally in the near future. "It is the right decision to have internal use of Bookings in combination with Teams," he says. "Teams will become the single point of application with our appointments, our calls, our chat communication, and our data transfer."

El Badarin-Deriy says he definitely recommends Bookings to other companies. "If you want to have more transparency and availability of appointments for your organization, and also within your teams, use Bookings. For both use cases, it's very easy, a big benefit, and an exciting application."

Takeaways

Many companies, from large enterprises to small businesses, already have access to Microsoft Bookings as part of their Microsoft 365 subscription. Have you investigated all the options available to you within the Microsoft suite? Are you paying for additional unnecessary apps?

Online school needed state-of-the-art technology for interactions between teachers, students, parents, and staff

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Stories:

Who: Florida Virtual School

Type of business: Educational institution

Stats: Offers more than 190 online courses to K-12 students across the nation

What makes the company tick
The organization started 22 years ago as a progressive initiative seeking to explore innovative teaching models based in online learning

What it needed
An efficient, easy way to schedule online meetings between administrators, teachers and students

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"We wanted something that's very easy for students to figure out. Otherwise,the teacher gets lots of phone calls about the system, and that's not efficient. Bookings was already part of our Microsoft 365 license, and it has really been a timesaver."

—Regina Collins, Global School Principal, Florida Virtual School

Business need

Florida Virtual School (FLVS), which enrolls K-12 public, private, charter, and homeschool students who want to supplement their education with individual classes or attend school virtually full time, recently saw an enormous increase in new student applications. The FLVS leadership team sought a solution that would help the nationwide organization quickly scale and provide state-of-the-art technology to students at all its online schools.

Not only do FLVS administrators and teachers meet online, but the organization's thousands of students and teachers do, as well. "Our students meet virtually with teachers multiple times per week for guidance, assessments, and course support such as tutoring, progress checks, and discussion-based assessments," says Regina Collins, Global School Principal at Florida Virtual School.

FLVS needed a way to support online interaction between its thousands of new and existing students and its instructional staff and wanted a solution that was versatile, easy to use, and saved time and money.

The rollout

To get started with the scheduling app, FLVS administrators and teachers watched online Microsoft Bookings tutorials on how to create various meeting types. "The simplicity and ease-of-use were very attractive to our team," says Collins. "We just downloaded the app, signed into Bookings, and started creating new meetings for our students. Teachers put time limits on each meeting based on what's appropriate for the students' age group. Then they select their preferred days and times, so students can only book when the teacher is available to meet with them. They click save and publish, and it's done. Then we share that booking page link with the students."

"Some of our teachers were already using Bookings," says Collins, "and others have joined more recently. The app has spread throughout the organization organically as teachers tell each other, 'Hey, this is really a timesaver.'"

Teachers also like that students, who range in age from elementary to high school, find it user friendly. "They just click on the type of appointment they need, fill out their name and contact information, and select 'book,'" she says. "We wanted something that's very easy for students to figure out. Otherwise, the teacher gets lots of phone calls about the system, and that's not efficient." FLVS has found that students find Bookings straightforward and easy to use

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FLVS needed a versatile and easy-to-use way to support online interaction between its thousands of students and its instructional staff.

Impact

FLVS teachers appreciate how Bookings helps them save time, such as when the scheduling program automatically adds appointments to their Outlook calendar. "With some other platforms, when you schedule an appointment, you have to add it to your calendar manually," says Collins. "The fact that Bookings does it for us automatically is a huge plus."

Another significant benefit is that Bookings was immediately available and at no additional cost to the organization. "Bookings was already part of our Microsoft 365 license, and it has really been a timesaver," she says.

The school's principals also find Bookings to be user friendly, and like that it saves them the time and clerical work of having to create meetings and email them to teachers. "Our teachers cannot be accidentally double-booked with Bookings," she says.

"It's a very smart, real-time system that works."

Takeaways

Microsoft Bookings is straightforward and easy to use, for both those setting up the tool and the end-users booking the appointments. Are your scheduling processes simple? Does your scheduling app make your work day easier and more efficient?

Bank achieved business continuity while transitioning to appointment-only services

Stories:

Who: Umpqua Bank

Type of business: Financial institution

Stats: Nearly 250 branches in five Western United States

What makes the company tick
Pushing the boundaries of what banking can and should be

What it needed
An efficient, immediate way to schedule all banking appointments to keep customers and associates safe during the COVID-19 crisis

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"We successfully deployed Bookings at enterprise scale in just a week with only a couple of people working on the project. That's unheard of."

—Robert Walters, Senior Vice President – Director of Technology Operations, Umpqua Bank

Business need

Following the onset of COVID-19, Umpqua Bank realized it needed a way to maintain operations as an essential business while keeping its branch staff and customers safe. The bank decided to switch its nearly 250 branches to a "by appointment only" system.

The idea was that customers could book two kinds of banking appointments. The first type, most often used by merchants, is for those needing to see a teller to make deposits. The second type, lobby appointments, is for customers who need to open a new account, sign loan documents, or conduct other transactions that require an in-person presence.

Umpqua Bank needed to find a smart scheduling solution that was easy to implement at scale and avoided a traditional call center that books appointments manually, which is less desirable because

it can be cumbersome and time-consuming. Bookings, which was tech ready and easy to implement, proved to be a perfect fit.

The rollout

The bank already used Microsoft Office 365 E5, which includes Bookings. Robert Walters, Senior Vice President – Director of Technology Operations at Umpqua Bank, says he was initially interested in using the Bookings app because Office 365 had already passed the bank's security checks, and there was no additional cost for the scheduling platform.

He asked the chief architect of Office 365 at Umpqua Bank to set him up with a test site. "In about 20 minutes, I had a functional prototype," he says, "and it was so easy to use. If it hadn't been, we wouldn't have been able to get 300 associates to use it and become effective administrators of it in just a couple of days."

The bank set up a Microsoft Teams channel to help with implementation, where they included a tailored Bookings user guide and created tabs with answers to frequently asked questions. Because the product is so easy to use and administer, the bank's help desk received few calls asking for assistance, which is rare when deploying a new solution. "The feedback has been good," says Walters. "I haven't heard anything negative about it."
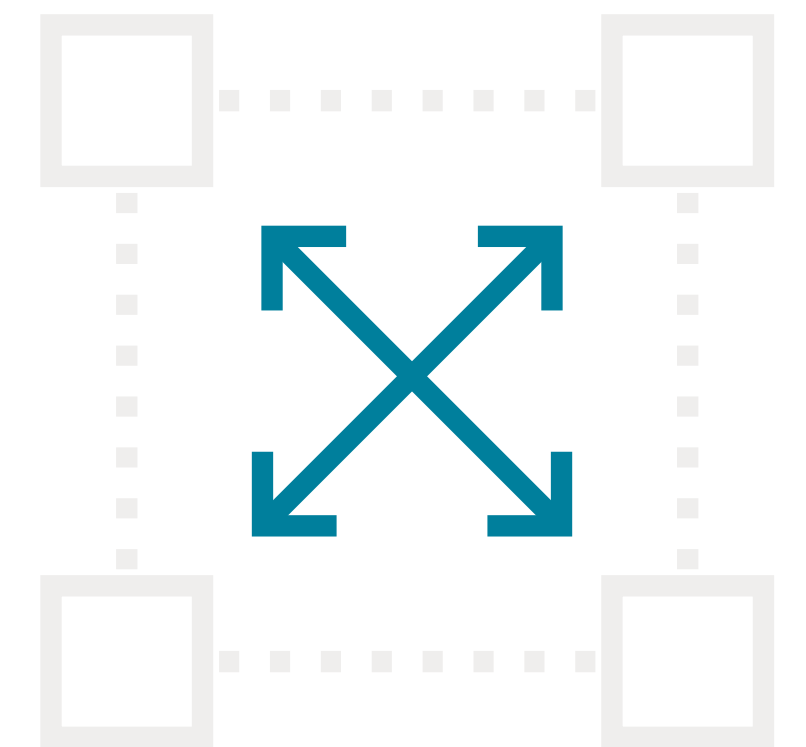
In 20 minutes,
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300 employees
were using effectively in just two days.

Impact

"I can't think of another example where we were able, at enterprise scale, to deploy a solution that was so effective in such a short time and involve so many people who are not technologists," says Walters. "We weren't asking developers to figure out how to use the Bookings administrative panel. We were asking bankers and tellers, where technology is something they use, but it's not their job."

Not only were customers easily scheduling their appointments, but branches also quickly saw ways to provide even better customer service by customizing the tool to cater to different customers' needs so the experience felt unique to them. They even created a QR code of the Booking web address, so walk-ins could point their smartphone and make an appointment right at the bank's door.

"The speed to deployment and speed to success were about as fast as anything I've ever seen," Walters says. "It was an amazing success."

Final thought

"For anybody who's on the Microsoft 365 platform, whether at an E3 or an E5 level, Bookings solves a universal business problem in a very effective way," says Walters. "We've all had that six-email chain where you go back and forth just trying to schedule a meeting. It solves that problem in a simple and easy-to-use way. If Bookings is in your portfolio suite and you need a scheduling tool, it's a no-brainer."

Takeaways

The best software apps are the ones that are quick to set up, even for people who don't work in tech, and easy for anyone to figure out and use. Does your business need a scheduling app you can get up and running quickly? How would it help you to allow your customers to schedule their own appointments online?

Three healthcare scenarios: Distributing face masks to an entire city, managing and conducting virtual healthcare visits, and reducing missed appointments

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Stories:

▷ Société de l'assurance automobile du Quebec (SAAQ)

▷ Zurich Insurance

▷ Florida Virtual School

▷ Umpqua Bank

▽ Three healthcare-related scenarios

Who:
Suresnes City Council

Calderdale and Huddersfield NHS Foundation Trust

Confluent Health

Type of business: Healthcare, Government

What they needed

- A city council in France needed to distribute tens of thousands of face masks

- A large healthcare system in northwest England wanted to better manage scheduling and decrease the number of missed appointments

- A healthcare provider in the United States needed to provide physical and occupational therapy across the country

These three organizations, like many companies worldwide, have found Microsoft Bookings easy to use and efficient in a variety of healthcare situations.

Suresnes City Council

When the city council of Suresnes, France wanted to distribute face masks to the town's residents in a short time—efficiently and without causing long queues—they decided to use Microsoft Bookings to schedule a pick-up time for every household in the city.

The council created multiple Bookings calendars for the project and ran them simultaneously, which allowed residents to easily schedule appointments using a phone, computer, or tablet. When they entered their address, the city's Geographic Information System determined their nearest pickup location. It then directed them to a booking page to schedule their appointment. After booking, people received personalized confirmation messages, programmable automatic reminders, and had the ability to reschedule or cancel online if needed. Bookings also helped the city council comply

with European Union (EU) data protection laws by ensuring users consented to relevant terms during the scheduling process.

The city also established a call center where people could phone in for appointments. At the call center, up to eight employees booked 478 appointments. With Bookings, only one employee was needed to handle nearly 12,000 appointments. The city of Suresnes successfully distributed nearly 23,000 masks in four days.

Calderdale and Huddersfield NHS Foundation Trust

Calderdale and Huddersfield NHS Foundation Trust (CHFT), in West Yorkshire, England, is another large operation using Microsoft Bookings. In 2019, the health service cared for more than 100,000 people in its two hospitals, handled 400,000 outpatient

appointments, and delivered approximately 5,000 babies. When CHFT wanted to implement a new appointment booking system to help manage scheduling and reduce missed appointments, it started by rolling out Microsoft Teams and Bookings in its oncology and child epilepsy units.

Previously, a patient needing a follow-up appointment was flagged in the hospital's system, and an administrator would mail a letter with a time and location. The process took up to a week. Now, with Bookings, the new booking is handled in seconds at the end of an appointment.

CHFT is experiencing reduced costs, fewer missed appointments, and its patients are receiving more timely care. "Our goal is to be as digital as we can be," says Chief Technology Officer Keith Redmond. "This means digitally empowering clinicians to carry on delivering care in more efficient, patient-friendly ways."

At the call center, it took up to eight employees to schedule 478 appointments. Using Bookings,

one employee handled nearly 12,000 appointments

Confluent Health

When the COVID-19 heath crisis struck, Confluent Health—a family of physical therapy and occupational therapy practices that provides shared services and professional development to more than 25 partner organizations across the United States—started using Microsoft Bookings and Teams to schedule and conduct virtual visits. Over video, a patient recovering from knee replacement surgery, for instance, can practice their exercises at home while a Confluent Health partner therapist watches and gives feedback in real time.

The healthcare services provider needed an easy way to schedule and manage these virtual appointments and started using the Bookings app in Teams. Schedulers can see appointments right alongside helpful information kept in channels and chats. They can check a "cheat sheet" stored in Teams to access information about a specific clinic, or easily chat with a clinic if there are questions. Bookings also automates patient notifications, meaning patients receive customized and automatic appointment confirmation emails showing the time, date, and therapist's name.

"We've been working with each partner to get them on board, and the centralized scheduling of appointments has generated great feedback," says Brooke Mugavin, Vice President of Operations at Confluent Health. "Everyone has commented on how easy it is to use for the virtual visits."

Takeaways

Healthcare organizations have used Microsoft Bookings to distribute personal protection equipment throughout an entire city, quickly book follow-up appointments, and, in conjunction with Microsoft Teams, schedule and virtually conduct physical and occupational therapy appointments. Are there ways your healthcare organization can use Bookings to make procedures easier and faster? How can you reenvision your scheduling processes to make them quicker and more efficient?

Microsoft

Learn how you can simplify scheduling tasks and save time with [Microsoft Bookings](#).