Questions to Ask Before You Buy Scheduling Software
30%. That's how much consumer expectations rose in one year according to the 2014 Brand Keys Customer Loyalty Engagement Index. And it's the sharpest rise in 20 years.

So, naturally, you're looking for all possible routes to a better customer experience. And you want to start by making the changes that will offer the right balance of high customer appeal and low internal effort.

Online scheduling just happens to meet all the criteria. And it's not out of left field for you, either. You've noticed the signs:

- You've had customers ask for it.
- Your competitors already offer it.
- Your employees attempts at hiding their frustration with your paper-calendar system range from pathetic to nonexistent.

So you know what type of solution you're going to implement. Now comes the challenging part.

**Choosing a scheduling software vendor**

Not all online schedulers are created equal. And — thankfully — there's no "one size fits all" solution. Features, pricing, maintenance, and customer support vary widely. You need to find the one that will most effectively and efficiently complement your business.

So you compile a list of vendors and sign up for some free demos. You get a feel for what each application has to offer, and narrow down your list. And then . . .

*Stop. Don't pick up the phone yet.* Let's get straight which questions you're going to ask, and why.

While specific needs and requirements differ among organizations, there are some standard questions you'll want to start with. To help you choose the best software for your company, here are the **10 most important questions to ask when choosing a scheduling software provider:**
Does the software provide the functionality you need?

This is actually a multiple-part question. In order to get a complete answer, you'll need to do your homework first.

Make a list of all the functions that you a) absolutely need, b) really, really want, and c) think would be nice to have. Then use your checklist to evaluate each software offering.

Aren’t sure what you need?

First, the basics:

- Ability to schedule appointments online (duh)
- Automatic appointment confirmations and reminders, preferably via both email and text, so you can offer your customers a choice
- An interface that's easy to use, and easy for your customers to use.

Next, look for features specific to your business requirements:

- The software can integrate with other software you're already using. There's no point in getting scheduling software that can't function with the other programs you've invested in.
- Offers integrated payment processing. Even if you're not ready to implement online payments, the feature can allow you to collect payment information, which you can use to collect fees for no-shows or cancellations.
- Capable of supporting multi-location businesses. Don't have multiple locations? Okay, not now — but you can't predict the future. All you can do is be prepared for it by making investments in business solutions that can grow with you.
Finally, think about features that would make your life easier:

- The ability to pull appointment data to send marketing emails to your customers.
- Easy-to-download performance and trending reports.
- A range of customer support options, so you can find one to fit your needs and budget.

Your wish-list will be unique to your business model and your staff needs, so make sure you spend some time on this step. You need to be able to articulate your needs in order to ask a vendor if their software can meet them.

For some things, off-the-rack works just fine. But not when you’re creating your company’s reputation.
2 Can it be configured to match your specific needs?

We covered functions in Question 1. Now we're talking settings. The ability to configure the software's settings is an important consideration, especially for industries that may have unique scheduling processes.

Think in terms of your business vernacular — rather than "appointments," you may be scheduling "meetings," "interviews," "sessions," or "deliveries." What the scheduling app calls "customers," you might refer to as "clients," "students," "drivers," or "volunteers."

Then there's how your schedule works. Some businesses will run on straightforward, one-on-one appointments, while others will be scheduling multi-day and recurring events. Again, it's important for you to be able to clearly articulate all possible scenarios you'll need the software to handle.

Ask each provider about the different options their software includes, and whether the options you don't need or want can be disabled or hidden.

3 What is their customer support like?

If you have a problem at 2:45 am, can you reach someone by phone? You want to be sure your chosen vendor not only has online documentation to help you, but actual people you can communicate with when you need to. Having quick access to your provider's support team — whether that's by phone, online chat, or email — is paramount to getting issues and problems resolved quickly.
Is it cloud-based?

This is a big one, because business is no longer conducted only from inside a company’s walls. Your customers and staff need to be able to access their appointments from home. From the road. At the airport. Maybe even on the beach in Costa Rica.

When interviewing scheduling companies, ask if their software requires any installations, downloads, or additional hardware. True cloud-based scheduling software is accessible from any computer, smartphone, or tablet with an Internet connection.

How thorough is their training?

You’ve heard the horror stories — a customer is sold on a great new software solution, but no sooner than the first payment is made, the customer is left in the dark on how to use it. Unfortunately, this scenario is more common than many realize.

A reputable SaaS vendor will offer new-client coaching to walk you through the software's functionality and best practices. They’ll make sure you have a good understanding of the software before they leave you to your own devices. And they’ll provide a way for you to throw up a flag should you need help down the road.
How dependable is the software (and the developer)?

It takes experience to be really good at what you do. Ask your potential software provider:

- **How long the platform has been around.** Yes, how long the business has been around is important. But far more important is how long the software has been in existence. The length of time a provider has been offering their online scheduling software will tell you a lot about its dependability.

- **How the software has changed over the years.** You’re trying to determine if the software’s development has been strategic. As in the stock market, past performance won’t guarantee you what’s to come. But it’s a fairly safe bet that if past upgrades and overhauls were strategically sound, anything that comes at you down the road will be advantageous.

- **What features have been created in response to customer demand.** You want to know you’re dealing with a company that listens to its customers.

- **What new features are in development.** Be sure to focus on what’s actually being developed right now. Don’t go down the path of “What do you plan to release over the next few years?” or “When are you going to offer X?” You can’t base your decision on maybes.

What is the average downtime?

Don’t believe any company who claims to have zero downtime. Every software application must occasionally deal with technical glitches and minor issues. However, reputable software providers take the appropriate precautions to dramatically reduce the probability of unexpected monkey wrenches.

Compare average downtime rates. Then ask what processes are in place to notify users of planned outages.
What do their other clients think?

Can the company provide references, testimonials, or case studies from your peers or competitors? Businesses in your industry may use the scheduling software in a similar manner, so it's a good idea to see examples from these clients. A real-life example can paint a clearer picture of the software’s utility than a fictional scenario.

If possible, contact another client and inquire as to how they use the application. If you can't do that, scour the vendor's website for customer testimonials, like this one about AppointmentPlus from Crescent Crown Distributing:

Is my data secure?

What safeguards does the vendor have to ensure your data isn't compromised or lost? Your company and customer data will be stored online in the cloud-based scheduling software application, so security should be taken very seriously. Inquire about the provider's standard security practices, its server database, data storage and backup procedures, and processes related to failover and federal regulations, if applicable.

You can never be too careful or ask too many questions about data security.
What's this gonna cost me?

The cost of online scheduling software can vary as widely as the features and functionality offered by each provider. Some are free, while others charge a monthly fee for their service.

You know the saying: You get what you pay for. Well, it generally holds true, particularly when it comes to cloud-based scheduling applications.

Most free applications are basic and do not offer the functionality or support needed by many operations. Those that charge a monthly fee are typically more robust, offer extensive features, and provide customer support.

You know what they say about an ounce of prevention

Selecting online scheduling software is a task that shouldn't be taken lightly, given the important role it will play in your operation of your enterprise. The work you do upfront to determine all your company’s needs and wants will ensure you choose the system that is the best fit for everyone who will be using it.

Of course, unknowns will pop up during any type of software search. But a little advance preparation can help you effectively examine the pros and cons of each scheduling system you're considering.
NEED MORE INFO?

Learn more about the 3 ways to make a SaaS application “your own,” and about the dangers of creating a custom branch from the base code:

Added bonus: Find out how an IT professional is like a tightrope walker. Plus, there are donuts. Mmmm, donuts.

Download free eBook

About Kendall E. Matthews

Vice President of Global Marketing and user of “The Force.” I’ve been a growth hacker since 1995, producing like a ZILLION inquiry leads (ok . . . a couple hundred thousand). Also good at taking 2 pm naps.

About AppointmentPlus

AppointmentPlus scheduling software is a configurable, rules-based, pure SaaS product. Our software — combined with our deep product integration knowledge, customer experience focus, and amazing ability to both analyze synergies and synergize analogies — has made us the vendor of choice for many Fortune 500 companies.

Since 2001, AppointmentPlus has been working with businesses to automate their complex customer, staff, and resource scheduling rules. And our Scheduling Cloud™ API has helped more than 215,400 locations worldwide schedule more than 54 million appointments.

Who else wants some awesome-sauce?