



The Complete Guide to Appointment Reminders

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SECTION 1

The Age of Digital Distraction

Every business targeting modern buyers has to combat buyer “busyness”. With the world at our fingertips, there are simply too many things vying for your client’s attention. Appointment-based businesses rely on the timeliness and attention-span of their clients to show up on-time and prepared for each appointment. But in a world filled to the brim with distractions, how do you compete to stay top-of-mind with your clients?

NO-SHOW’S, UNPREPARED-SHOW’S, AND LATE ARRIVALS CREATE AN ANNUAL ECONOMIC LOSS TO THE U.S. WELL IN EXCESS OF \$150B.

U.S. businesses spend as much as 65% of their revenue on sales and marketing activities. Did you know it can be 25 times more expensive to acquire a new client than it is to keep the ones that you have?

But simply acquiring a new client appointment isn’t the hard part. Getting them to show up on time is the real challenge.



It can be 25x more expensive to acquire new clients than it is to keep the ones that you have.

15%-30%

THE NATIONAL NO-SHOW RATE

If your business focus is only on acquiring new clients you're letting profit leak through the cracks.

Digital Overload

U.S. adults [check their phone 52 times a day](#), on average. That's up from the 47 times per day in the previously conducted study by Deloitte. For years, [rumors have been floating around](#) that the attention span of humans is now shorter than that of goldfish, 8 seconds and 9 seconds respectively. Regardless of which data points you want to look at, the facts are clear: our smartphones have changed expectations on how we consume data.

Your clients are no different. It's time to take the necessary steps to communicate with your clients in a way that matches those expectations. Technology is moving at a breakneck speed, but that doesn't mean it has to be painful to keep your business up with the times.



Let's take a deeper look at the current state of digital adoption in the U.S.

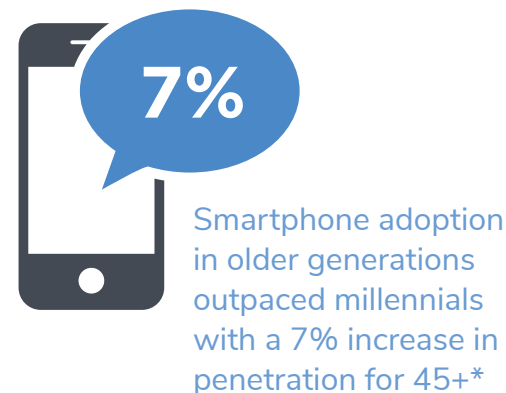
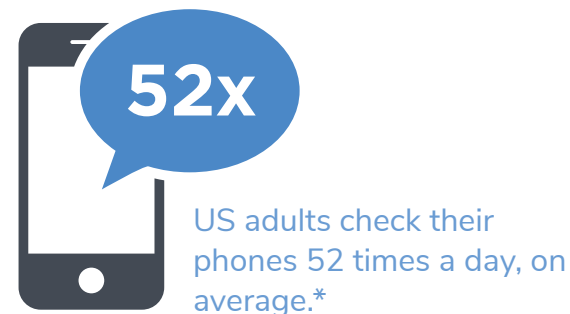
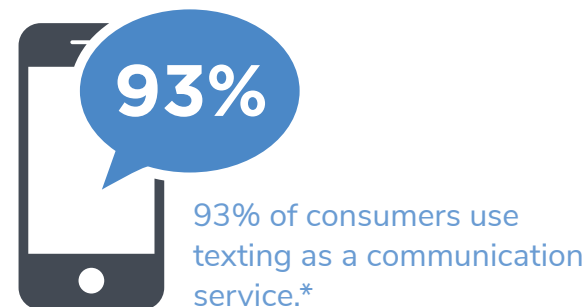
Digital Adoption Rates

The next time you run to grab a quick cup of coffee, look around. Notice something? Smartphones. Everywhere. Our daily experience makes it clear that smartphone usage is up across the board.

Those stats are fascinating, but don't really move the needle on how to manage your appointment-based business.

WHAT'S MORE IMPORTANT THAN *HOW OFTEN* THEY ARE USING THEIR PHONES IS *HOW THEY* ARE USING THEIR PHONES.

Knowing what your customers are using their phones for each day allows you to create a strategy to communicate with them in a way that matches (and exceeds) their expectations.



* [Deloitte](#)



Consumer Behavior Statistics for Appointment-Based Businesses

Working adults don't keep their cellphones in their desks all day. People have their smartphones out at work. While taking a personal phone call in a quiet office may be difficult, quickly checking and responding to a text is not.

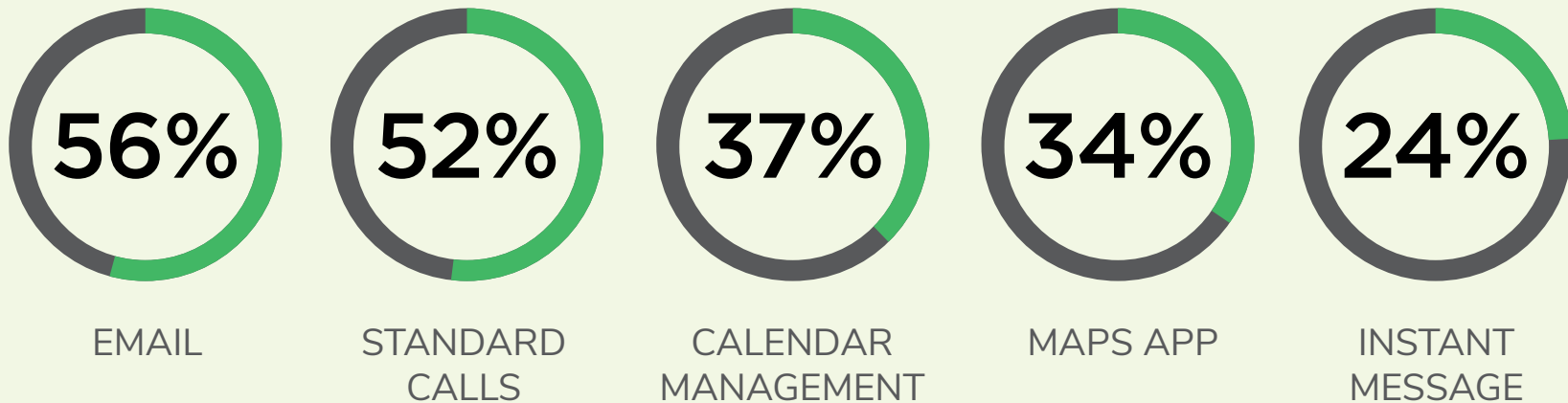
84% OF WORKING ADULTS USE THEIR PERSONAL PHONES DURING WORKING HOURS.*

Most employees don't have a "work phone". As unlimited data plan prices continue to drop and data usage for personal browsing increases, the BYOD (bring your own device) phenomenon isn't going anywhere.

* [Source](#)

The top three work-related activities employees conduct on their cell phones are email, standard phone calls and calendar management. Appointment-based businesses need to take advantage of all of the screen time used for calendar management.

TOP 5 WORK-RELATED SMARTPHONE ACTIVITIES



Time spent managing calendars is on the rise. Most average adults manage 3 calendars: work, personal and family. Adults with multiple kids are managing even more than that. With the added complication of so many schedules to keep track of, it's easy to get lost in the noise. Without reminders, you run the risk of increased no-shows simply due to client forgetfulness.

Personalization and Brand Loyalty

“Personalization”. You’ve probably heard this buzzword floating around the internet, typically surrounded by articles about innovation and growth. Many businesses today are achieving customization, but not personalization. What’s the difference?

Personalization is “a means of meeting the customer’s needs more effectively and efficiently, making interactions faster and easier and, consequently, increasing customer satisfaction and the likelihood of repeat visits,” according to TechTarget.

Customization, by definition, is “the action (by a user) of modifying something to suit a particular individual or task.”*

The difference lies in who is making the alterations. Personalization is completed (typically through automation) by the product or company for the user. Customization is completed by the client or user.

* [Source](#)

per•son•a•liz•a•tion

noun:

a means of meeting the customer’s needs more effectively and efficiently, making interactions faster and easier and, consequently, increasing customer satisfaction and the likelihood of repeat visits

cus•tom•i•za•tion

noun:

the action (by a user) of modifying something to suit a particular individual or task

For example, Amazon personalizes their homepage for individual users using previous search and purchase history. On the other hand, if you customize your new smartphone, you, as the consumer, will choose screen size, memory, color, etc.

28%

BRAND LOYALTY AMONG MILLENNIALS INCREASES BY 28% ON AVERAGE IF THEY RECEIVE PERSONALIZED MARKETING COMMUNICATIONS.*

63%

63% OF CONSUMERS STOP PURCHASING PRODUCTS AND SERVICES FROM COMPANIES WHO PROVIDE POORLY EXECUTED PERSONALIZATION.*

Because of this expectation, your business has to adjust. It is either meet the expectations of your clients, or slowly become obsolete. Personalization may seem impossible to achieve without a supercomputer and a data scientist pulling strings behind a curtain, but it doesn't have to be. It can easily be achieved with a simple tool that is able to integrate with your applications that store client data.

For instance, if you keep appointment data and details in a CRM like Salesforce.com or simply in your calendar or address book, a client messaging system that can integrate with those applications makes personalization a breeze.

This ebook will take a close look at how to create and execute a reminder strategy that maximizes your client engagement and starts you down the path to eliminating no-shows.

* [Source](#)

SECTION 2

Beginner's Guide to Appointment Reminders

To break through the noise of their day, you need to send simple but informative appointment reminders to your clients. But how do you get started? Let's break it down into actionable bites.

Information to Include

Appointment reminders, by definition, are messages sent to your clients that contain details about their upcoming appointments. They usually include date, time, location and type of service.



Reminders should be customized to fit your clientele, but here are some general guidelines:

INFORMATION TO INCLUDE IN YOUR APPOINTMENT REMINDERS

ALWAYS INCLUDE:

Date | Time | Timezone

INCLUDE MOST OF THE TIME

Name of your Business | Service or Appointment Type

Confirmation & Reschedule Request Instructions

Location & Address

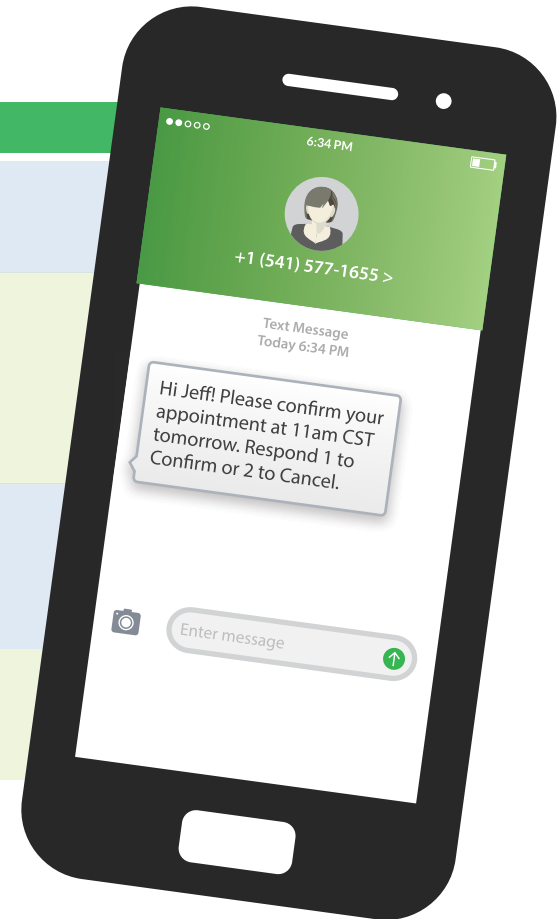
INCLUDE SOME OF THE TIME

Name of Person Providing Service | Parking Instructions

Things to bring like complete forms, proof of insurance, ID etc.

INCLUDE WHEN APPLICABLE

Cancellation Policy



How Do Appointment Reminders Work?

There are several ways to send appointment reminders to your clients. Let's take a closer look.

MANUAL

To send messages manually, access your client's information and appointment details, and then send those details through their preferred method of contact. It might be text, email or through phone calls. To complete the text messages, either use your own personal mobile phone, or work with a vendor who can provide a business texting number. If you choose to setup a new number, you can avoid your clients texting you on your personal number.



PROS: No monetary cost unless you set up a business texting number. DIY which means limited time spent learning a new tool.



CONS: This is the most time-intensive option. This method requires you to spend your personal and family time sending appointment reminders. (see Best Practice section)

HERE ARE SOME
VENDORS TO CONSIDER
FOR A BUSINESS TEXTING
NUMBER:



app**toto**

ADD-TO-CALENDAR

Many calendars and scheduling systems are beginning to add an automated booking message that is triggered when the appointment is created. Clients can then add the appointment to their own calendar and receive reminders from their own calendar.



PROS: Very little setup. Easier for client to 'add to calendar' when the appointment is created due to the triggered notification.



CONS: The challenge with singular trigger-based reminders is that they don't solve the issues of forgetfulness and distraction on the day of the appointment. One reminder isn't enough to truly eliminate the problem of no-shows.



62% of
no-shows
occur simply
because the client
forgot.

FULLY AUTOMATED

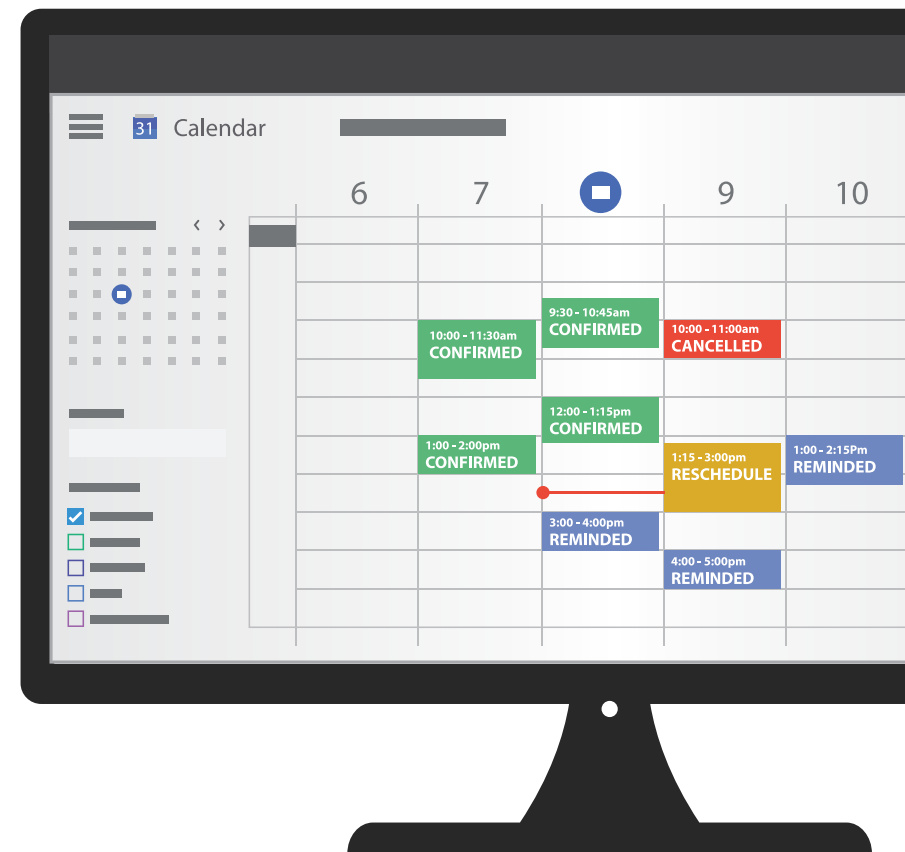
With a fully automated appointment reminder system, you can 'set it and forget it'. Meaning, that after your initial configuration, appointment reminder cadences will be triggered as appointments are added to your schedule. With a fully automated service, you can even translate reminders into multiple languages based on the preferred language of your client.



PROS: This option is the most customizable and reliable, allowing you to choose frequency and timing of messages, as well as tailor the content of the messages for your clients. Your clients can also provide you with their real-time intent to attend your meeting, which then shows up on your scheduling calendar.



CONS: To achieve a fully-automated solution, you will need to invest in an appointment reminder system.



What capabilities you should look for in a reminder system:



Rules-Based - Reminder sequences should have the ability to be differentiated based on the types of appointments you offer (ex. initial consultation, annual check-up, etc), which offers a personalized approach for each client and lets them know you are expecting their arrival - or what they should be expecting with yours.



Calendar Integration - Should be able to work with and enhance your existing CRM, calendar and address book - eliminating double entry and saving time. Wholesale scheduling system changes can have lengthy implementation and training processes and often require you to deviate from the scheduling workflow that is in place and working for your business today.



Multiple communication formats/options to match your client's needs
- Options to use SMS text, email and voicecall. Features to customize language and preferred method of contact should be available.

Why send appointment reminders?

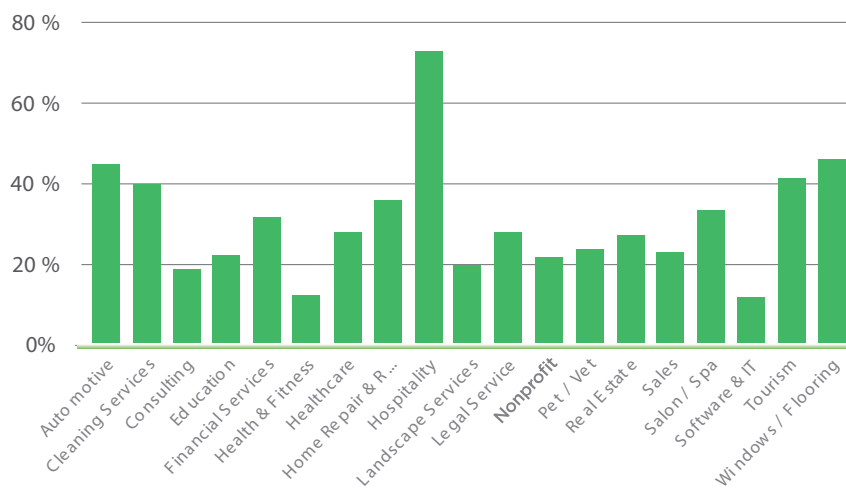
With a national average no-show rate of 15-30%, the challenge for appointment-based businesses doesn't end when a client schedules an appointment. The hardest part is getting them to actually show up, and preferably, arrive on time and prepared. Many businesses walk a fine line between spending countless hours and hiring additional staff to handle appointment reminders versus accepting a higher no-show rate.

Many appointment-based businesses rely on reminders and confirmations via phone call. But, data shows that text message reminders have an average 53.5% higher response rate than voice call reminders. See how your industry compares.

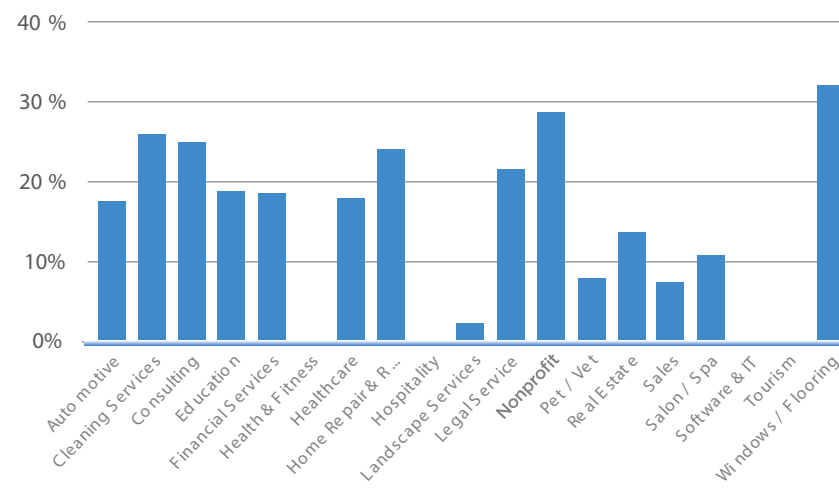
53.5%

TEXT REMINDERS
HAVE AN AVERAGE
53.5% HIGHER
RESPONSE RATE
THAN VOICE CALLS.

SMS RESPONSE RATE BY INDUSTRY

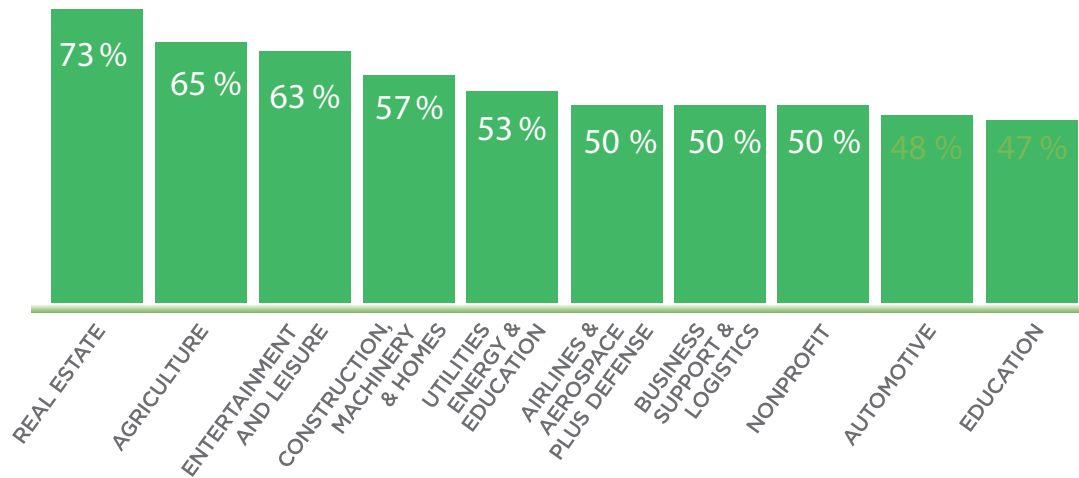


VOICE CALL RESPONSE RATE BY INDUSTRY

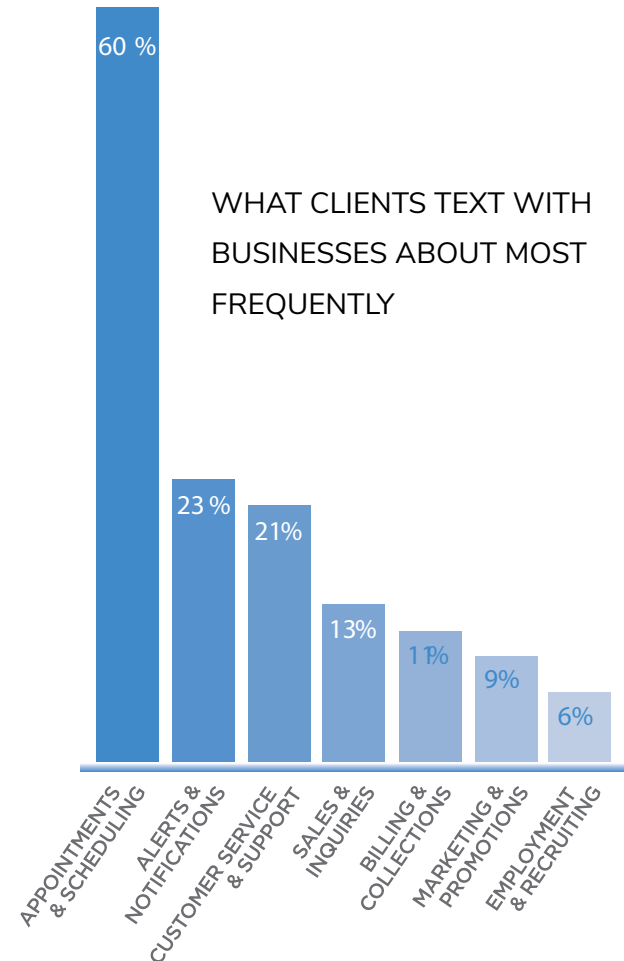


Worried that your clients aren't open to texting with businesses?
It's already happening in every industry.

TOP 10 INDUSTRIES THAT REPORT TEXTING WITH CLIENTS



WHAT CLIENTS TEXT WITH BUSINESSES ABOUT MOST FREQUENTLY



But what are they texting about? An overwhelming majority of business-to-client texts are sent regarding appointments and scheduling. That means that appointment reminders and online scheduling options are no longer “nice to haves”. They are expected by your clients.

90%

90% OF TEXT MESSAGES ARE READ
WITHIN 3 SECONDS OF BEING DELIVERED

After analyzing millions of appointment reminders sent via text, voice call and email, the data is clear. Appointment reminders are crucial to the success and efficiency of your business. And text reminders are the king of the reminder world.

In the next section, we will take a look at how to write and send effective reminders.

SECTION 3

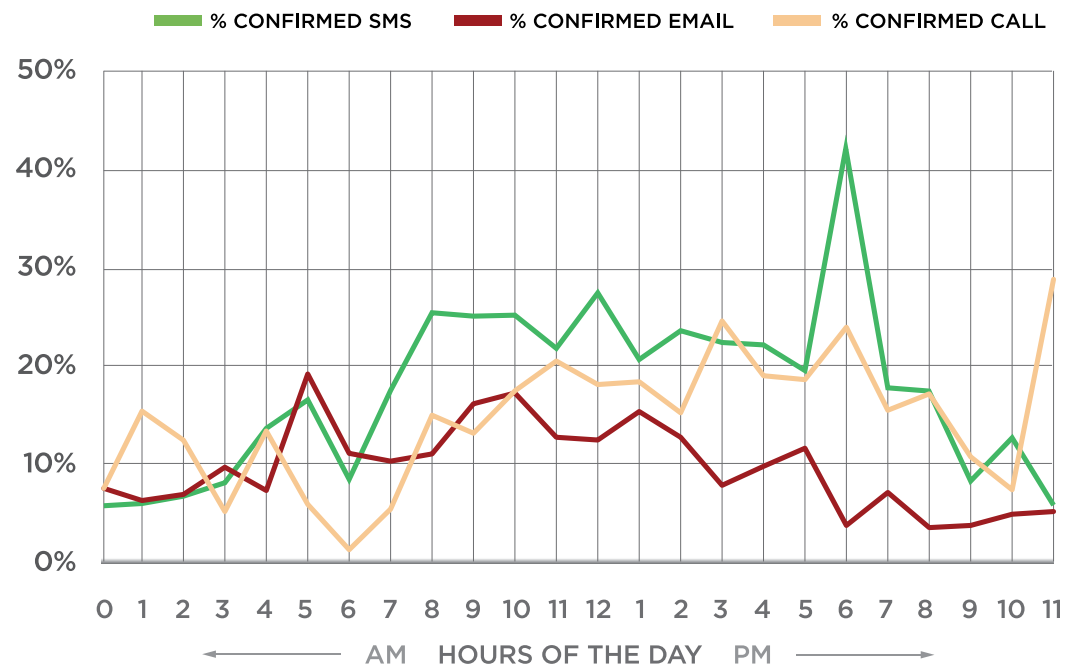
Best (and Worst) Practices

Though there are several ways to send appointment reminders, if you aren't following best practices, messages may be slipping through the cracks. No one likes to waste time. Follow these easy best practices — and avoid common pitfalls.

When to send appointment reminders

Without an automated system to send appointment reminders, oftentimes reminders get sent when it's convenient for you and your staff but not optimal for your client. Maybe your receptionist does all of his calls when he gets in each morning? Or perhaps the only chance you have to send a quick text to your next-day clients is each evening after you've wrapped up your other tasks.

CONFIRMATIONS FROM REMINDERS: SMS V EMAIL



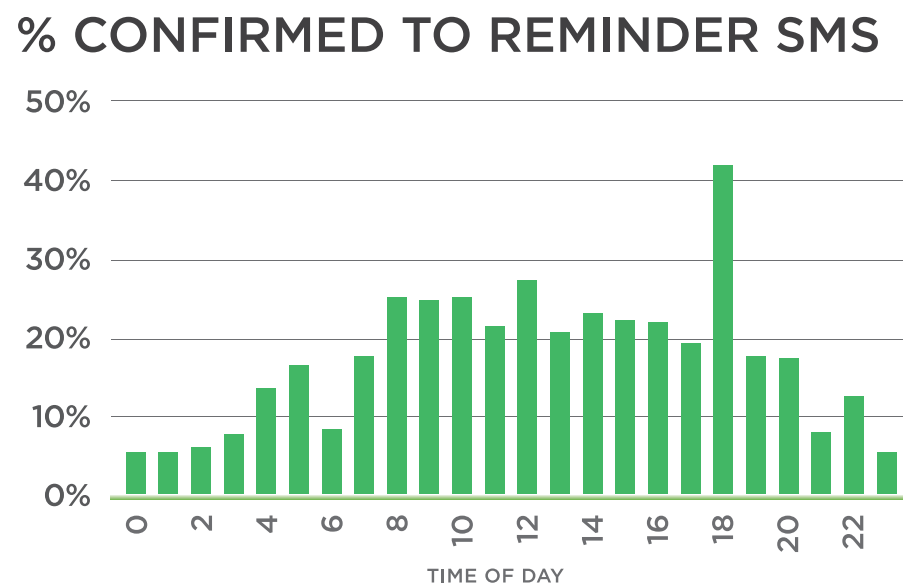
Whether you choose to send your reminders via text, call or email, make sure to send your reminders at the best time of day to receive a confirmation from your client. If you have a strict cancellation policy, this practice is even more important.

Tracked logs of your reminders and client confirmations provide the necessary accountability and proof to act on any late arrivals or cancellations. (See more in the Cancellation Policy section of this chapter!)

When sending SMS reminders, the two best times to send those messages are at noon and 6pm, with 6pm being the clear winner.

SMS TEXT REMINDERS SENT AT 6PM HAVE A 41.4% HIGHER CONFIRMATION RATE THAN SMS REMINDERS SENT AT NOON.

During those two hours of the day, your clients are most likely to pick up their phones and confirm. Sending at any other time of the day could potentially bury your text among others that they need to respond to, lowering the confirmation rate.

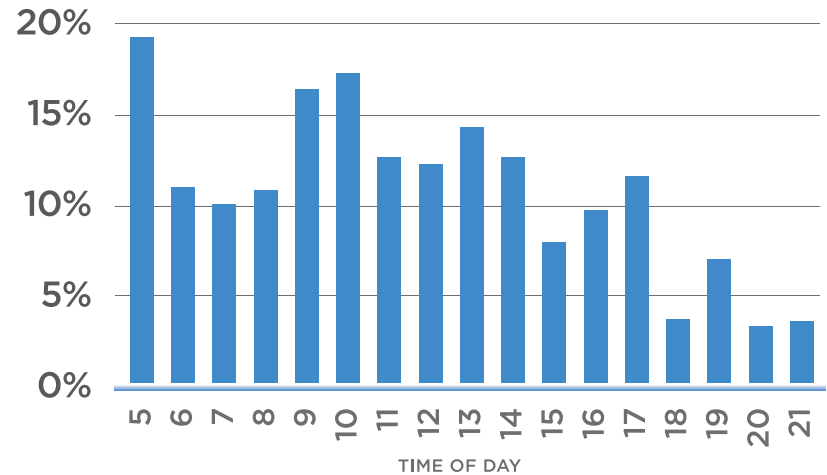


Interestingly, there is a very different story with reminder emails. Though the average confirmation rate from emails is lower than text messages by over 65%, many clients find value in sending email reminders due to the additional space and formatting options versus an SMS text.

WITH EMAIL APPOINTMENT REMINDERS, CHOOSE TO SEND YOUR REMINDERS EITHER AT 5AM, 9AM OR 10AM TO GET THE BEST RESULTS.

When using reminder calls rather than written

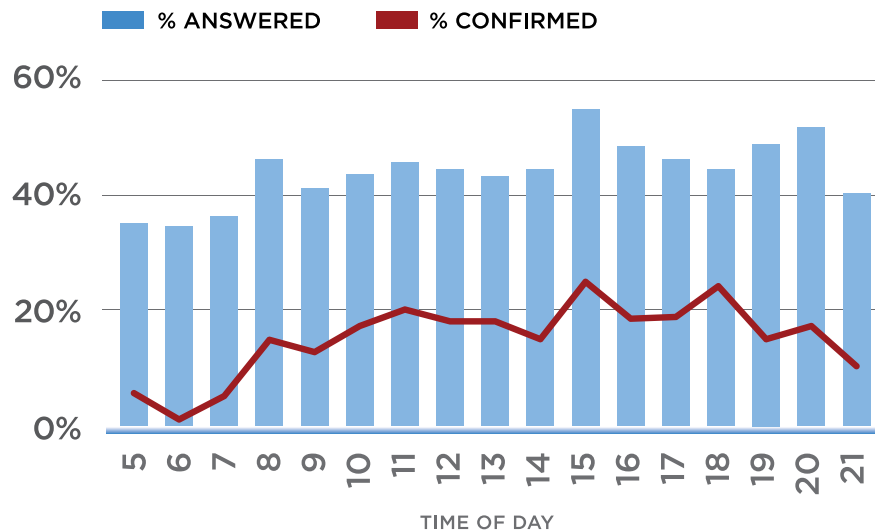
% CONFIRMED TO REMINDER EMAIL



communication, calls should be placed at 3pm to get both the highest answer rate as well as confirmation rate.

DATA SHOWS THAT OVER 55% OF REMINDER CALLS PLACED AT 3PM WERE ANSWERED AND OVER 24% WERE CONFIRMED.

% ANSWERED AND % CONFIRMED FROM REMINDER CALLS



REMINDER	PERCENT CONFIRMED	BEST HOUR OF DAY TO COMPLETE MESSAGE
SMS TEXT	42%	6:00 PM
PHONE/VOICE	25%	3:00 PM
EMAIL	19%	5:00 AM

When to Send Initial Booking Confirmations

Initial booking reminders are the notifications that are sent when someone books time with you. These typically include a confirmation button, as well as a reschedule and add to calendar option. It may seem counterintuitive, but not all initial booking messages should be sent immediately after the booking takes place.

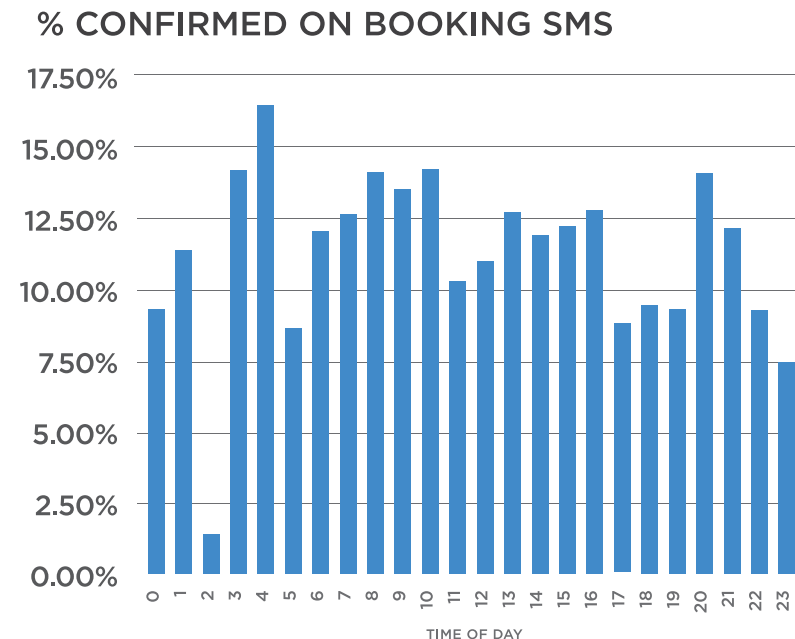
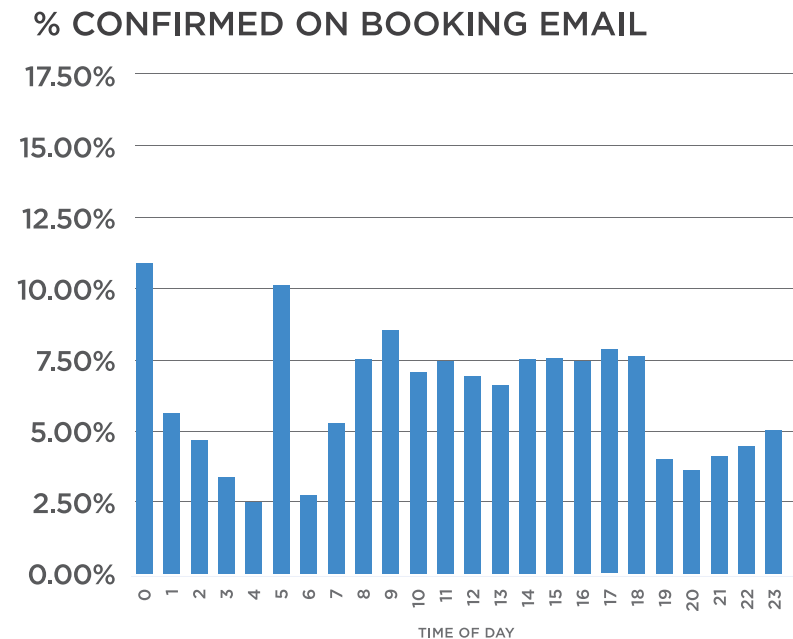


Send Immediately: If an appointment is booked online, send an immediate confirmation. Without any sort of immediate communication, many clients will think that the appointment request didn't go through, which will ultimately lead to more work for you and your staff.



Wait 3-4 Hours: If someone books a meeting in person, wait 3-4 hours prior to sending out the booking confirmation. That allows your client a chance to reflect and potentially remember any existing conflicts that they had. In an ideal world, when they booked in person, each client will check to make sure there are no conflicts. But we've all been there. You get in your car and continue with your task list and remember that you booked dinner with your in-laws, or have an all-day meeting that you can't move. Waiting to send that initial reminder will decrease last-minute cancellations or reschedules.

Booking messages have a lower confirmation rate than reminders.



That means that if you truly want to lower your no-shows, relying on systems that only send initial booking messages is not enough. Many of the online scheduling tools that are on the market today only send initial booking emails, but do not have the functionality to be able to send any custom-timed reminders leading up to the appointment and most certainly not by phone, text and email.

Tracking No-Show Rates

One of the most important best practices for running your business is tracking no-shows and late arrivals. No-shows cost you money, and late arrivals cost time, cause your entire day to run behind and can ultimately lead to brand degradation (no one wants to do business with someone who is habitually late).

Tracking your no-show rates allows you to do two things:

- 1 Accurately Forecast:** You have a better understanding of incoming revenue which leads to better forecasting, as well as predictable and reliable planning for the number of appointments you truly need to hit your growth goals.
- 2 Hold clients accountable:** If you have a cancellation policy, it is imperative that you have accurate records. Inevitably someone is going to try to refute a cancellation fee. With an accurate system of record, you can easily defend your policy and your fee.



No-shows
cost you money.

Late arrivals
cost time.

Another accountability factor to consider is the need to “fire clients”. Though it may seem harsh, a client who frequently does not show up or is commonly late to appointments is not always a good fit for you or your business. One Apptoto healthcare client combatted “habitual no-shower’s” by setting a threshold of no-show’s or late cancellations they were willing to accept from a patient, and once that threshold was exceeded, that patient was moved to a drop-in only facility.

Though that may not work for all industries, or for your business, keeping an accurate count of your no-show rate is imperative to running an efficient and profitable business.



Cancellation Policies

Cancellation policies are a touchy subject. While some industries like salons, spas and fitness gyms have a high adoption of strict cancellation policies, others like automotive or home services are shying away from them.

If a cancellation policy is right for your business, make sure it meets these three criteria:

1 It's clearly communicated

Display the cancellation policy in all the places your clients will visit. Your cancellation policy should be displayed on your booking notifications, reminder messages, at your office, and on your website.

2 It's easily documented

You must be able to document that the policy was communicated and that a violation occurred. Both initial booking notifications and reminder messages are written documentation that the cancellation policy was communicated. If your no-shows are well-documented, you have everything you need to handle any disputes from your clients.

3 It's consistently upheld.

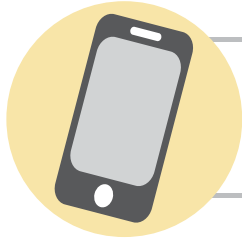
Consistency is key. Avoid any potential issues by treating each client the same. If you feel like this is going to be an issue, a strict cancellation policy may not be the right solution for your business, which is okay!

DO YOU WANT
TO CREATE A
CANCELLATION
POLICY BUT DON'T
KNOW WHERE TO
START?

START HERE

Ideal Length of Message

For the highest response rate, follow these guidelines for the overall length of your message.



TEXT:
BETWEEN 140 - 175 CHARACTERS



VOICEMAIL:
LESS THAN 30 SECONDS



EMAIL:
BETWEEN 50 - 125 WORDS

Local Caller ID

People want to do business with someone local to their area. Localization is important for all areas of your business, not just your appointment reminders. In fact, Google reported a 500% growth in “near me” mobile searches with an intent to purchase.*

That search data shows us that your clients have a strong intent to do business with, and spend their money on, products and services that are close to them. As a business, you can take advantage of that intent by sending all of your communications from a local number. Using Caller ID data, you can make it clear that all of your reminders are coming from a local business.

This also matters because your clients will respond to the number they receive reminders from. It is quite common for clients to shoot a quick text to the reminder text thread saying they will be 5 minutes late or don't know where to park. Make sure to choose a reminder service that allows you or your staff to receive and respond to those messages, and use a number in your area code or enable your current landline number to be used to send reminders.

* [Source](#)



Google reported a 500% growth in “near me” mobile searches with an intent to purchase.

3 Common Mistakes and Easy Solutions

1 Focusing on no-shows more than late-shows

If your first appointment of the day is 30 minutes late, your entire day is off. The ripple effect of a late client can change the perception of your business for an entire day's worth of clients, not to mention causing you to be rushed for the rest of the day which increases mistakes and stress. Also, late arrivals cause more late arrivals. If you clients believe you are always going to be running 10-15 minutes behind, they will start to arrive later and later for their scheduled appointments, believing they have some wiggle room.

Solution:

If you are running late, send a quick text to all clients who will be affected notifying them of the new time to allow them to plan accordingly.

2 Failing to customize timing based on best practices

It's really easy to simply set a reminder "24 hours prior to the appointment". But using default settings rather than timing your messages based on data gives you lower confirmation rates. Take the time to schedule them properly.

Solution:

Set your reminders to take place at the time they will be most effective. Follow the easy chart below.

REMINDER	PERCENT CONFIRMED	BEST HOUR OF DAY TO COMPLETE MESSAGE
SMS TEXT	42%	6:00 PM
PHONE/VOICE	24.6%	3:00 PM
EMAIL	19.2%	5:00 AM

3 Only sending one reminder

One reminder isn't enough. You need to send 3 appointment messages: an initial booking confirmation, a reminder a day before and a reminder 1-2 hours before depending on your business.

Solution:

Send 3 appointment messages and reminders.

By following these best practices and avoiding the common mistakes, you are guaranteed to optimize your appointment-based business to run more efficiently. Not to mention saving yourself quite a bit of time.

SECTION 4

Getting Started with Appointment Reminders

It's clear that appointment-based businesses need to stay top-of-mind for their clients leading up to a scheduled appointment. [Get started](#) down the path to eliminating your no-shows, and saving you and your staff hours each week.

How to Send Appointment Reminders

1

Connect your current appointment calendar to your appointment reminder system.

With a few clicks, integrate your current calendaring process to an appointment reminder system. Learn more about [Apptoto's integration capabilities](#).

2

Data is extracted from your current calendar

Once connected, the appointment reminder system will extract appointment details like client name, date & time of the appointment, appointment type and more. With systems like Apptoto, you can even include custom details in the body of the appointment to be used in your rules-based messages. For instance, notate language preference like Spanish, or add in additional appointment attendees who also need to receive reminders.

3

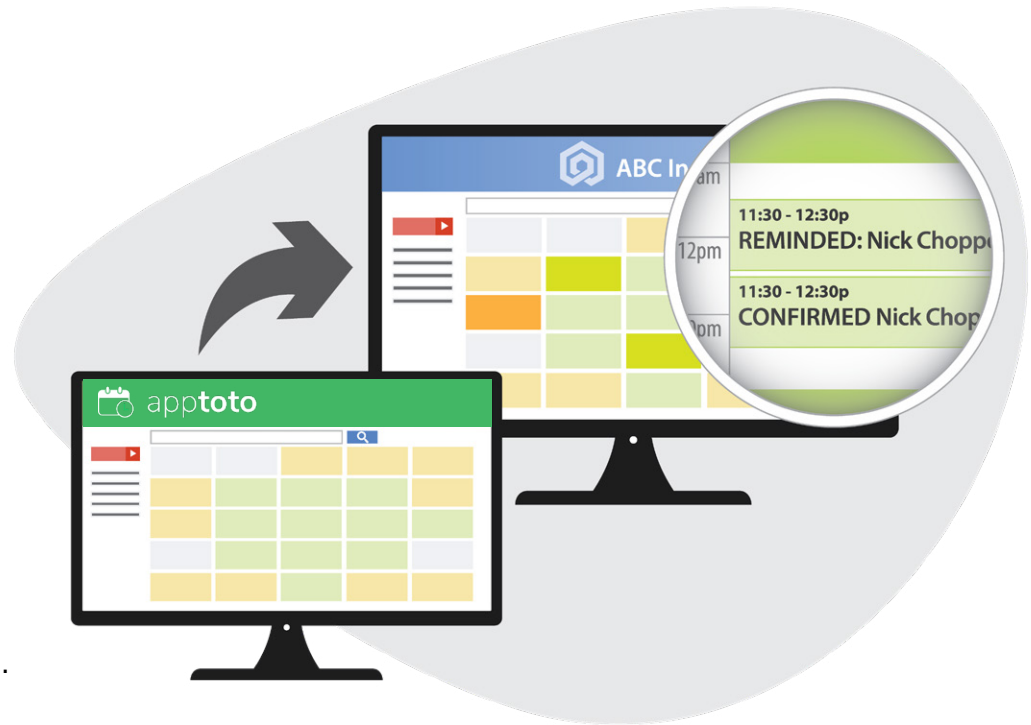
Create and customize your reminder messages

Download our templates below, or start from scratch to set up and customize your automated reminder messages.

4

Start reminder cadence

Once you create your customized reminder messages, turn on your cadence to begin automatically reminding clients as appointments are scheduled. Make sure to use the best practices discussed in Part 2. With Apptoto, as appointments are sent and clients respond, your calendar is automatically updated to help you keep everything organized.



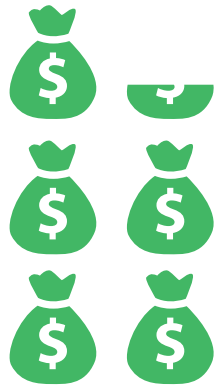
NEED INSPIRATION? WE HAVE
INDUSTRY-SPECIFIC REMINDER
TEMPLATES TO GET YOU STARTED.

**DOWNLOAD
NOW**

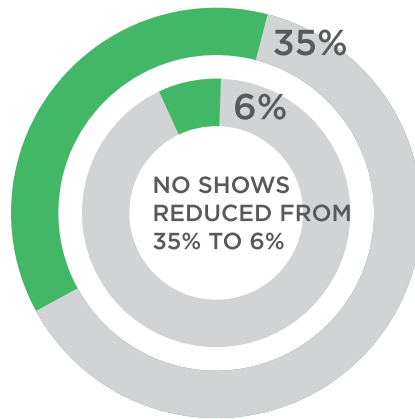
SECTION 5

Case Study

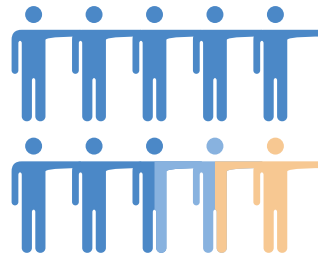
Healthcare Clinic: \$5.2m Annual ROI After Using Apptoto



5.2M ANNUAL ROI



75% - 85%



CANCELLED APPOINTMENTS
REPLACED WITH WAITLISTED

BUSINESS PROFILE:

- 200-300 SCHEDULE APPOINTMENTS PER DAY
- MULTIPLE CLINICS AND LOCATIONS

RESULTS:

- REDUCED NO SHOWS FROM 35% TO ONLY 6%
- 75%-85% CANCELLED APPOINTMENTS REPLACED WITH A WAITLISTED PATIENT
- \$5.2M ANNUAL ROI AFTER USING APPTO

Do you want to know what Apptoto could save you and your business? Based on your industry and hourly billing rate, you can see exactly what our appointment reminders could mean for your bottom line.



Email: sales@apptoto.com

Call: 888-318-3765

