RiverStar

EASING THE BURDEN OF TAX APPOINTMENT SCHEDULING:

5 WAYS LEADING VITA/AARP SITES ARE GETTING IT RIGHT

Every year, organizations across the nation spend thousands of hours scheduling tax counseling appointments. However, inefficient scheduling systems can cause over-bookings, under-bookings and no-shows. Here's how today's leading contact centers are automating the process.

APRIL 2019 - TAXES DUE

AUGUST 2018

MAKE SCHEDULING SELF-SERVE

Offer the ability to schedule by phone, online or via mobile, giving clients appointment options that align with available time slots.

SEPTEMBER 2018

GAIN APPOINTMENT VISIBILITY

Scheduling agents should have an up-to-the minute, accurate picture of all available time slots in every office to avoid over-bookings.

OCTOBER 2018

SEND APPOINTMENT REMINDERS

Automated appointment reminders via email or text with proactive confirmations dramatically reduce no-shows.

CENTRALIZE SCHEDULING DATABASE

Syncing all scheduling information in one central location will eliminate double-bookings or over-bookings.

STREAMLINE SCREEENING

Make the screening process easy for agents and clients alike to expedite scheduling and eliminate wasted time.

APRIL 2019 – TAX MONTH

REAL RESULTS. MEASURABLE IMPACT.

RiverStar's Appointment Scheduler solution has delivered proven results in several states, including:

UNITED WAYS OF CALIFORNIA

- 32,000+ total appointments scheduled
- 10,000+ appointments scheduled via mobile self-service application

MICHIGAN 2-1-1

- 66 tax counseling sites taking appointments across 16 counties
- 15,000+ total appointments scheduled

LEARN HOW TO AUTOMATE TAX APPOINTMENT SCHEDULING > riverstar.com/tax-scheduler