REFLEXIS

Reflexis Appointments

ENSURE A SAFE, PERSONALIZED EXPERIENCE VIA INTELLIGENT APPOINTMENT MANAGEMENT

Customers' concerns and expectations are higher than ever. When customers enter a branch, they want a safe, personalized experience with knowledgeable and certified staff. But given disruption and outdated tools, many organizations struggle to provide pre-scheduled, personalized services. Creating a safety-compliant, connected, omnichannel experience can be almost impossible without a robust appointment solution. It should operate natively with the branch's forecasting, scheduling, and daily activity management systems and processes.

Reflexis Appointments™ enables you to offer seamless appointments, with intelligent booking and scheduling processes to connect clients with certified, qualified resources at the most appropriate times for the customer and bank. It enables banks to attract and serve new clients and engage customers with value-added experiences—account openings, consultations, workshops, personalized experiences, and more—executed by skilled colleagues. It enables your customers to book appointments in real time from your website or mobile app, while aligning employee schedules with real-time demand.

STREAMLINE BOOKING AND SCHEDULING PROCESSES

Empower customers to use Reflexis Appointments to simplify scheduling, planning, and preparing for appointments—including completing necessary documents, prior to any meeting. The solution also ensures qualified employees are scheduled and prepared to provide the best possible customer experiences.

Simplify the Customer Experience: Enable customers to book in-person, virtual, or web appointments from your website or mobile app, via an intuitive, branded portal. Clients can easily select appointments, at their convenience, by searching across service/product types, locations, and other variables.

Align Appointments with Staff: Automatically assign new appointments to available and appropriate colleagues who have the requisite skills or certifications. Leveraging the Reflexis ONE™ platform, enables incorporating appointment setting with demand forecasts, schedules and daily work activities—without creating additional integrations.

Improve Visibility: Allow branch managers and colleagues to quickly view all scheduled meetings via MyWork™ —an intuitive activity management dashboard. Managers can assign/reassign appointments to qualified colleagues, as well as review meeting details or add notes. In addition, the bank can easily integrate Appointments with existing CRM and other core systems.

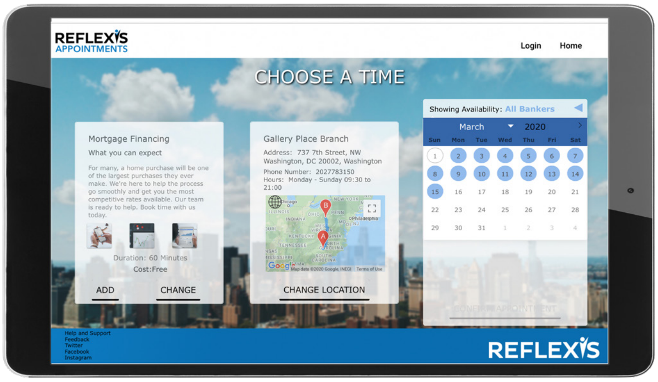
DELIVER GREAT ON-SITE CUSTOMER EXPERIENCES

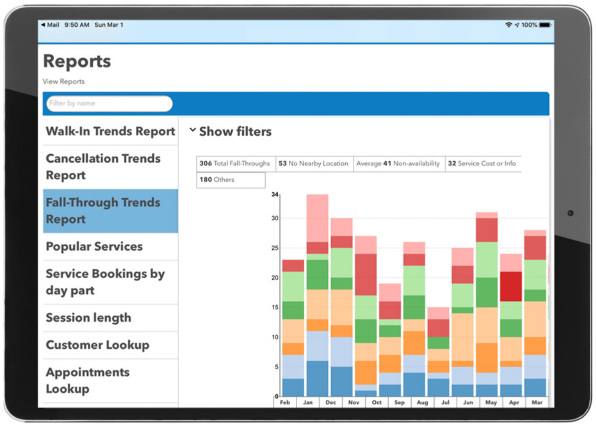
Ensure that customers who arrive at a branch for an appointment have frictionless, connected experiences. Eliminate long waits, crowded lobbies, and inadequate service. Let them leave delighted.

Enable Capacity Management: Appointments allows you to check customers in when they arrive and out again when they leave, to control traffic on-site.

Accomodate Walk-Ins: Managers have real-time visibility into both scheduled and walk-in appointment queues making it simple to add walk-in meetings and capture all relevant customer information.

Reduce Wait Times: With better alignment with labor schedules and real-time visibility into both pre-booked and walk-in meetings, Appointments makes it simple to have enough skilled associates available to meet demand, keeping wait times short.





DRIVE ADOPTION, ENGAGEMENT & CROSS-SELL

Reflexis Appointments offers dynamic, easy-to-use dashboards and reports in key categories. Identify trends and adjust forecasts, and schedule staffing based on:

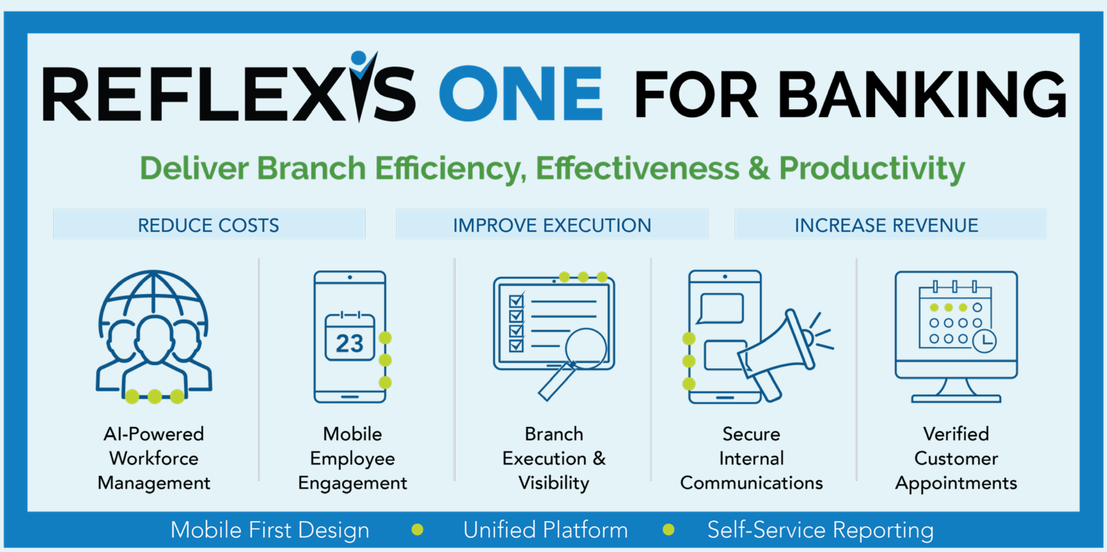
- Improvement in experience scores for visits Understanding experiences for offered services Evaluating cross-sell metrics
- Scheduling meeting times Reducing cancellations/no-shows
- Capturing/identifying types of walk-ins
- Optimizing meeting length according to different services

You can evaluate overall appointment efficacy and make adjustments to improve customer satisfaction levels, drive operation excellence, and increase sales conversions.

MAKE APPOINTMENTS PART OF YOUR BRANCH OPTIMIZATION & OMNI-CHANNEL CUSTOMER ENGAGEMENT STRATEGY

Customers expect a seamless experience—it doesn't matter if they interact with your organization online, from a mobile app, or in a branch. Reflexis Appointments allows customers to move effortlessly from your digital channels to your physical locations. They can easily select a guided salesexperience, expert advice on complex financial matters, or other personalized services.

Reflexis Appointments can be implemented in a matter of weeks and easily integrates with your CRM platform, calendaring tool, or other third- party systems. The solution helps you ensure customers receive a powerful, engaging experience at every touchpoint.



The Reflexis ONE™ intelligent work platform is used by our customers across the globe to simplify execution, improve communication and optimize labor decisions.

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To learn more about Reflexis Appointments, visit www.reflexisinc.com.
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