Virtual Visits with Microsoft Teams and Microsoft Bookings

Remote customer engagement more important than ever

"Virtual Visits" Scenarios

Healthcare: Telehealth Patient Video Visits

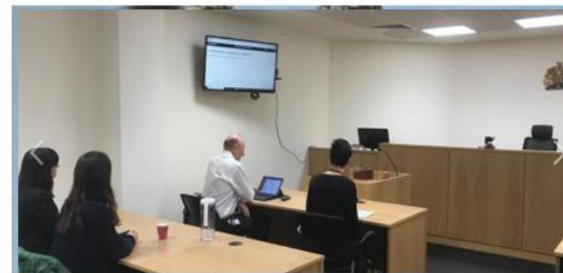**FinServ: Video Banking with Remote Advisor**
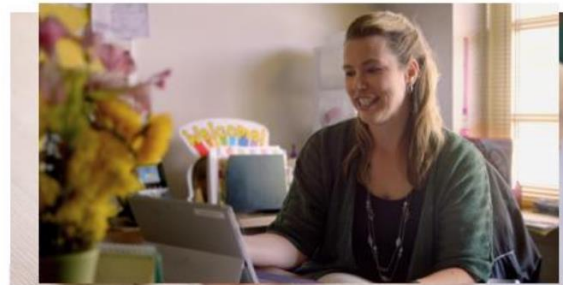
Small Business: Customer Connections

Retail: Customer Video Support

Interviews

Government: Virtual Courts and Corrections

Education: Parent-Teacher Meetings

Public Sector: Citizen and Field Services

Virtual Visits – challenges with Teams standalone

- Teams Meetings come from an individual, not a business
- Confusing Terminology: Meetings vs Visits, Consultations, Appointments etc
- No self-service for customers
- No reminders = no-shows
- Administrator/scheduler dependency
  - Scheduling
  - Rescheduling
  - Cancellations
  - Reminders
- Administrator/scheduler overhead
  - No templates etc
- Managing staff calendars
  - just because they're free doesn't mean they're available for customer appointments
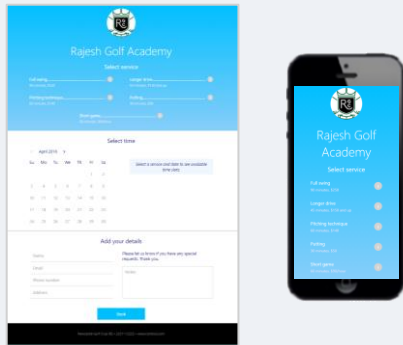
What is Microsoft Bookings

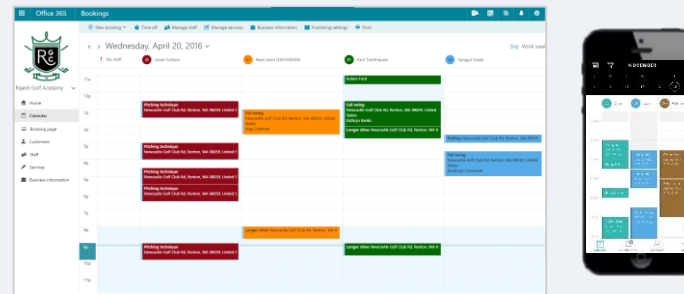## Customer

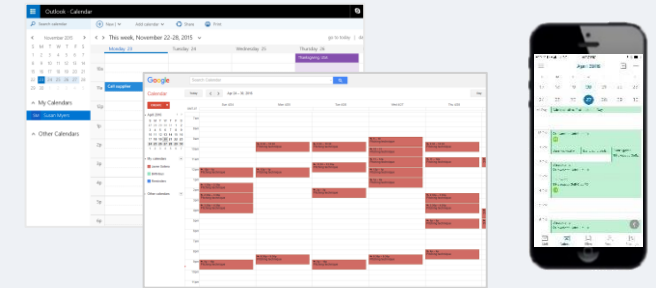## Administrators and Schedulers

Staff

Self Service

Customer books service on web page using their phone or browser and gets an email confirmation and reminders.

Scheduling Tools

Schedulers, administrators, or staff can manage bookings, record customer preferences, customise how services and staff are scheduled.
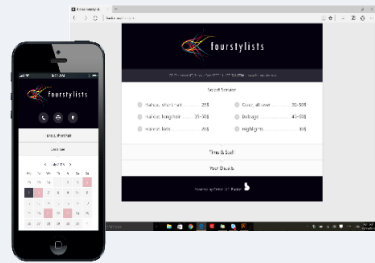
Staff schedules

Staff sees their bookings and gets reminders, even if they aren't on O365.

Benefits of Bookings w/ Teams
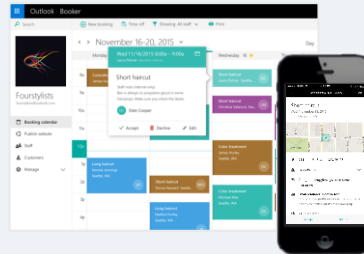
Customer

Delight customers

Customer books service on web page using their phone or browser and gets an email confirmation with a calendar invite and reminders.
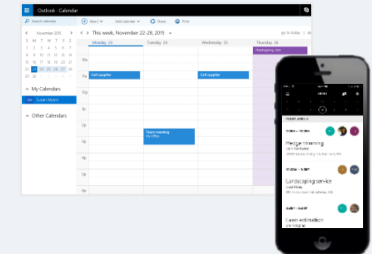
Administrators and Schedulers

Save time

Owner or staff can manage bookings, record customer preferences, customize how services and staff are scheduled.

Staff

Decrease no-shows

Staff members see their bookings in their calendar and get reminders, even if they aren't on O365. Customers get a calendar invite and reminders.

Bookings Licensing

- Schedulers require E3
- Staff require E1 or E3
- Customers don't require licenses

Enabling Bookings: https://support.microsoft.com/en-us/office/get-access-to-microsoft-bookings-5382dc07-aaa5-45c9-8767-502333b214ce?ui=en-us&rs=en-us&ad=us

Demo Time – Telehealth Scenario w/ Bookings and Teams