Introduction
Frank Cort, Founder

Welcome to Apptoto automated appointment messaging service. Apptoto's goal is to help appointment-based professionals set their business apart by automating the appointment reminder and messaging part of their business. Apptoto believes that seamless integration of this service with our customers' calendars will decrease no-shows, decrease overhead, and increase revenue and profit. Because of the ubiquity of the free Google calendar, Apptoto was originally developed to work with Google calendar, but can be used with other on-line calendars. Apptoto offers a valuable service at a relatively low cost that augments business tools that are available to many businesses of all sizes. The future of appointment-based businesses lies in maximizing the information contained in the calendar, and Apptoto extracts, stores and automate actions all from the calendar.

Apptoto software is a cloud-based service that can be accessed from anywhere. Users create an account. Once an account has been created, users can download the application and start using it with their Google, Outlook, Microsoft 365 or Salesforce calendar. Fees are based on the number of reminders and services included with the plan.

Apptoto automatically extracts contact information from the user's calendar. The user sets the schedule for messaging client with appointment reminders or other appointment related information. Users can schedule more than one reminder. Reminders can be sent as SMS text, emails, or voice calls. Our customers schedule the reminders which include a link that allows their clients to confirm, cancel, or reschedule the appointment. These customizable messages can include information about the appointment like location, directions, etc. Those receiving the reminder can then add the appointment to their calendar. Apptoto customers can actually customize the info included in their clients' calendar entry.

In this media kit you will find:

1. Company information

2. Apptoto appointment reminder service fact sheet

3. Apptoto review

4. Recent press publications and articles

5. White paper/sample article

6. FAQs

7. Brochure

8. Case study

For more information contact media@apptoto.com or frank@apptoto.com.

Company Information

Apptoto has been waging war against appointment no-shows since 2011. It began as a side project for founder Frank Cort after his barber complained about having to manually call clients the day before their appointments. Frank put together a mashup of Google Calendar and Twilio and posted it online and in a few forums. The response was extremely positive and soon Frank was focused on it full time. Since then Apptoto has helped thousands of clients in over 90 countries reduce no-shows and streamline client communication. Apptoto is based out of Dublin, CA.

Apptoto is a privately held company.

Fact Sheet

What is Apptoto?

Apptoto is a cloud-hosted appointment reminder messaging service.

How does Apptoto work?

Once you sign-in for an account, you download the application. Apptoto automatically extracts your client contacts from your calendar. You can then select who receives reminders, customize the reminder schedule and the reminder format (SMS text, email, voice mail). The reminder message can also be customized to include additional information such as directions.

Apptoto Features

Set up Apptoto once and it's off and running, automatically reminding your clients of their appointments and updating your calendar at the same time. No need for you to manually remind clients.

Google Calendar™ Integration
More and more appointment-based professionals are using Google Calendar™ to track their appointments. Apptoto integrates seamlessly with Google Calendar™.

Outlook Calendar™ Integration
Microsoft Outlook Calendar Microsoft Outlook is still used by more than 30% of appointment based professionals! Apptoto integrates seamlessly with Outlook Calendar™ (download required).

Office 365 Integration
A cloud-based service with business tools including calendars and scheduling, Office 365 goes with you everywhere on every device – cell phone, tablet, computer. Apptoto goes with it, working easily with all calendars on all devices.

Salesforce Integration
Apptoto works hand in glove with Salesforce, the leading customer relationship management software (CRM).

AUTOMATED APPOINTMENT MESSAGING SERVICE

FACT SHEET CONTINUED

Versatile and customizable reminder schedule

Set-up and customize when and how your clients are reminded.
Reach your clients by email, SMS, or voice. You can set more than one reminder per appointment to reach clients in different ways at different critical times. With voice messaging, your clients hear your voice when they are reminded of their appointments. Use the Caller ID feature so clients see your office phone number on their caller id when they are reminded!

Screenshot of Apptoto Portal Event showing "Calling Now":
https://www.evernote.com/shard/s4/sh/c9caa273-1980-417a-9d1d-6950b21d9f3b/8b72897b25fbd2b75e6457fb47336f9b/deep/0/Cursor-and-Automated-Appointment-Reminders-and-Reminder-Service—-Apptoto.png

Immediate Notifications

You can be notified immediately if an appointment cancels or reschedules through SMS or email. Apptoto also updates your appointment's status in your calendar.

Screenshot Google Calendar shows "[REMINDED]" and "[CONFIRMED]": https://www.evernote.com/shard/s4/sh/0081f315-aee3-4733-b83f-b3888f6b1fc2/0dbe8fcb77d531050bda9966b9970007/deep/0/Cursor-and-Google-Calendar.png

Multilingual messaging

Record or create messages in any language.

¿Se habla español?

Use pre-recorded or pre-written voice or message templates in Spanish.

Multiple Calendars

Do you have associates that schedule appointments? Apptoto can connect to their calendars and remind their clients as well!

Schedule Follow-Up Reminders

Remind clients when it is time to schedule their next appointment.

Screenshot of Apptoto's fully customizable message content: https://www.evernote.com/shard/s4/sh/31e9f19d-ce3c-42aa-a707-36da38fc2984/615a0d7b7d197764316414fdde5ce7d8/deep/0/Cursor-and-Automated-Appointment-Reminders-and-Reminder-Service—-Apptoto.png_

FACT SHEET CONTINUED

Conditional Messages

Create conditional messages that sends different information depending on their response. Use to streamline rescheduling to a different location or to set-up clients to receive different types of information (for example, send a first-time client new client paperwork).

Contact Information Extraction

Automatically extracts contact information from your calendar for easy set-up

CSV Import

Import your appointment contacts from CSV files for easy set-up and use.

Custom "add to calendar" content Help your clients remember the appointment and all the details with custom "add to calendar" content.

https://www.evernote.com/shard/s4/sh/9a8019e1-fed7-4423-a42f-258fe9bf010f/4cbd4081abb207ec89459a 808ee2bb41/deep/0/Cursor-and-Apptoto—-Your-appointment-receptionist!.png

Custom "Appointment Page"

When your clients see your reminder they can clink on a link that sends them to a customized page with additional information such as directions, links to Google maps, etc. This can then be added to their calendar displaying the information you think they need for their appointment.

AUTOMATED APPOINTMENT MESSAGING SERVICE

apptoto

REVIEWS

9 total reviews, 4 verified

Great Service... Reduces No shows....
by Basem Shlewiet

Verified user
September 02, 2012

I am very satisfied with every aspect of this App. SMS, Email, and Call reminder to clients. Also marks your calendar with confirmations, or cancelations....etc.
Report this

5 star(s)
Excellent Product and Service
by Debby Knapp

Verified user
August 04, 2012

Helpful product to help remind my clients of up coming appointments. When I'm to busy it never forgets to call.

5 star(s)
Absolutely Brilliant.
by Mark ANSON

Verified user
August 30, 2011
Have been trialling this app for the last month. Am now using it to support clients for a team of 20. Sending 500 reminders per week. Nothing is too much trouble for the support.team. They are quick to respond and if you need a change.... ..no problem. It is user friendly and incredibly easy to set up. I highly recommend this app if you need to cut down no shows and last minute cancellations etc.
Needs to be easier to find in the marketplace. I searched for months for some sort of app to link to the info in Google Calendar to remind customers and I stumbled upon this whilst looking for something else. Pricing actually makes it an economically viable proposition to use. WAS A DIAMOND FIND HOWEVER AND WELL WORTH THE SEARCH.

www.apptoto.com

AUTOMATED APPOINTMENT MESSAGING SERVICE

REVIEWS CONTINUED

5 star(s)
Awesome Service--Fanatical Support--been fanatical!!!!!
by Jeffrey Katz

July 05, 2011

AppToTo: rocks. We didn't think we could afford a reminder service-- but our overall AppToTo experience has shown us that we can't afford not to have it. Our no show rate has plummeted, and our clients now think we are technically savvy.... Not only do our clients get an automated phone call confirming their appointments, but they also get a SMS message on their phone reminding them of the appointment. These guys even send us a text message when clients cancel their appointments.

While the interface on line seems overly simplified, the real genius of this software is the people who run it. They have been great about customizing the service to fit our needs. The overall customer support has The biggest problem with the service is that they don't make it apparent how customizable it is. Hopefully, they'll revamp the web site to include greater emphasis on how to reach customer service, and make it more obvious that this product is the "swiss army" knife of reminder services.

www.apptoto.com

AUTOMATED APPOINTMENT MESSAGING SERVICE

Technibble Article

Avoid Missed Client Appointments with Apptoto
by Dave Greenbaum

If your clients are anything like mine they often forget their appointments. Sometimes they'll blame us for recording incorrect information. Other times they'll just forget to write it down or check their calendar. No-shows or "sites not ready" cost us all money. Apptoto is a cost-effective solution for computer repair businesses to prevent missed appointments.

How it Works

Apptoto is a web-based service that reads your Google Calendar or your Outlook 2007 (with plug-in). Once you put the appointment on your calendar, Apptoto automatically reads key information like date, time, email addresses and phone numbers. Beyond those basics you can add fields like location and the name of the calendar. You can also add key custom fields. For example, I have a REMINDER field that tells clients to bring a power cord to the appointment if they have a laptop.
I've got many technicians on my team and Apptoto can read all the calendars directly from Google. We name the calendars based on the technician doing the service, so Apptoto reminds the client of the technician's name. Here's an example of the customized email reminder we send out.
"Subject:
Service call Reminder: DoctorDave Computer Repair {DAYANDTIME} at {LOCATION}
Message:
Hi {NAME},
This is a reminder for your appointment with DoctorDave Computer Repair {DAYANDTIME} with {TECHNICIAN} at {LOCATION}.
{REMINDER}"
At the end of the email is instructions how to confirm, cancel or reschedule as well as our contact information and cancellation policy.
The phone message and SMS reminds them of the date and time and asks they confirm the appointment.

Reminder Options

Once you have your appointment in the system, Apptoto can remind clients by email, phone, SMS. You can record your voice on the phone reminders or let Apptoto use its computer generated voice. Older clients sometimes have trouble understanding the message, but I've had no problems. Phone calls show your caller id information.
Apptoto lets you specify how far in advance the reminders go out and at which times. I've got it set to remind clients by email one day before an appointment. Reminders go out between 9am and 8pm. If they don't respond, they get a phone call and an SMS reminder four hours in advance. They can confirm, cancel or request rescheduling. If a client contacts you before the Apptoto reminders go out, you can cancel the reminders. You can also tell Apptoto not to remind certain clients. That's handy if it's a standing appointment or you don't have to worry if the client will show up.

Pricing

If you use the pay-as-you-go plan, reminders are 25 cents each. Reminders are based on individual appointments, so if you use phone, email, and SMS they only count as one reminder. Most technicians will pick a monthly plan starting at 60 reminders for $9.99.

Support

I've been a customer of the system for a year and the owner, Frank, has always been responsive. Usually I get a response within 24 hours if not sooner. The system is easy to use, but I've had a few glitches at the beginning due to some ignorance on my part.

Client Reaction

Clients love this system. They say it's just like their doctor's office. They're used to these types of systems and appreciate the reminders. Not only do we remind them of the appointment, but we confirm key information about the call. If they don't show up to the appointment, it's easier to bill them for a missed appointment. We've document they confirmed and agreed to our policies. Emergencies happen with clients, but we've eliminated most missed appointments using this system.
One interesting side-effect of this reminder system is that when clients have follow-up questions, they'll respond to the email confirmation. We're already in their inbox, so why not? It's a great way of reminding them that your company is their computer repair provider.

Final Opinion

Clients who don't show for their appointments cost computer repair companies not just money, but the relationship with the client. Implementing a system like Apptoto keeps your technicians busy and billable.

Affiliate link (supports the author)
Full Disclosure: I do make some money if you purchase through my affiliate link above. However, I use and believe in the product and it doesn't make it any more expensive for you.

Cloudshifters article

http://blog.cloudshifters.com/2013/03/apptoto-google-calendar-automating.html

Apptoto + Google Calendar: Automating customer reminders for your business

Automating customer reminders for your business
It is somewhat common knowledge by now that you can set up SMS (text message) reminders in Google Calendar to alert you in advance of upcoming events. Along with email and pop-up reminders, SMS messages are a great way to keep track of upcoming appointments in a busy world. What if you could also remind the people that you invited? With Apptoto, you can. Voice reminders? Check. Email reminders to any domain? Check. Apptoto also lets you give customers the ability to confirm, reschedule or cancel appointments.

As a Google Apps for Business reseller, we are sometimes approached by businesses seeking a fully automated reminder system. They love working in Google Calendar but are looking to reduce the administrative overhead of continually reminding customers via mail, phone, email, etc. None of these tasks are part of their core business, but they are crucial to ensuring utilization and reducing no-shows. There has to be a better way. At cloud shifters, we highly recommend Apptoto, a Google Marketplace app that integrates with Google Calendar and Google Apps for Business.

3 reasons why Apptoto is right for your business
1. Apptoto is simple
Apptoto is easily added to Google Apps for Business and configuration is a snap. Once you enter your contact information, it's as easy as selecting which calendars you want to use -- Apptoto will then automatically send reminders on your behalf. You can choose email, voice, SMS or any combination of the three. You can either enter the email or phone number directly in the Google Calendar entry or configure Apptoto to pull contact information directly from your Google Contacts.
2. Apptoto is interactive
What is worse than having to remind your customers of their appointments? Not knowing whether or not they got the message. Unless you get a live person on the line, you have no way of knowing if they received the reminder. Apptoto will continue to notify your customers until they confirm. There's even a status displayed in your calendar to let you know whether or not an appointment has been confirmed. Plus, Apptoto can be configured to allow your customers to reschedule or cancel their appointments. In fact, Apptoto guarantees to reduce no-shows, saving your business both time and money.
3. Apptoto is priced right
With Apptoto, there is no up-front investment in software. You get 30 free reminders and then you only pay for what you use ($25 for 100 reminders). Apptoto considers notifying one person for one appointment a reminder, it doesn't matter how many calls, text messages or emails it takes. There are also a number of monthly subscription plans available. Want to remind your customers of their Monday appointments? Because the service is automatic, you can even configure it to send reminders when your business is closed.

Putting it all together
At cloud shifters, we highly recommend shifting your business to the cloud with Google Apps. No matter what your business does, be it salon, dentist, chiropractic, real estate or something else, if you want to reduce customer no-shows you owe it to yourself to try Apptoto. Contact cloud shifters to get started today.
Posted 25th March 2013 by Chris Channer

AUTOMATED APPOINTMENT MESSAGING SERVICE

Four Business Goals Your Appointment-Based Business Can Reach to Increase Revenue, Decrease Operating Costs and Grow

by Frank Cort, Apptoto

Whether your business is auto repair, beauty services, driver's education, counseling/therapy, health services, legal services, pet care, or tax preparation there is one thing held in common - you live and die by your appointment calendar. You may have kept your costs down by using a no-cost calendar service such as Google Calendar™, but there are still three key steps you can take to increase your revenue and your profit.
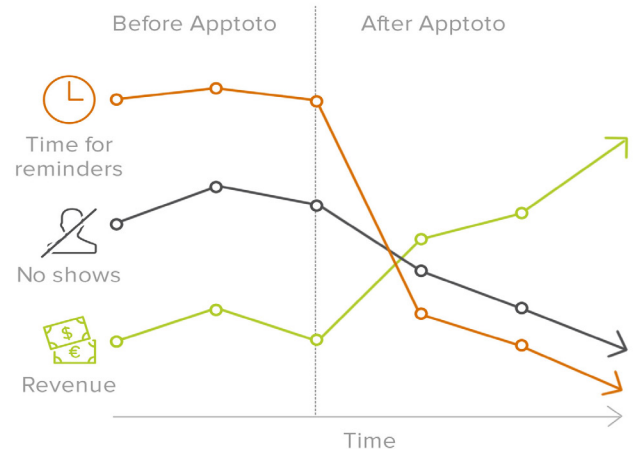
Reduce no-shows

It seems obvious, but your client has to show up for you to make money. Even if you charge clients for no-shows, that can be tricky to enforce. It can damage the relationship between service provider and client. Even if you are paid for the missed appointment, you have the opportunity cost. Maybe a new client didn't schedule with you because your calendar looked full.

Decrease office costs

The amount of time your staff spends reminding clients of their appointments varies based on the number of appointments you have per week, but the average appointment-based business estimates as much as 10 hours of staff time spent contacting clients, rescheduling, and giving out repetitive information such as location, directions, where to park.

Increase return visits

Your clients remembered the first appointment - but do they remember to schedule the next one? Sometimes a client has to walk out the door without making their next appointment. Don't lose that client when a simple follow-up schedule the next appointment reminder will bring them back.

Before Apptoto — After Apptoto

Time for reminders

No shows

Revenue

Time

Build instant rapport with your clients

No-one wants to feel like they made a mistake. Everyone is busy, rushed, and worried. Take one thing off your clients mind - remind them the way they like to be reminded - voice, text message, or email - of their appointment and provide them with critical appointment-related information. They will remember that you helped them take the first step to a successful visit with you - just by showing up!

Achieve your goals

There is always a lot to do when you are running an office, but achieving these four goals is simpler than you think. Use an automated appointment reminder service that works with your calendar to remind your clients of their appointments. Most plans cost tens of dollars per month and often offer a free trial so you can make sure it works for your calendar application. If you think you can't afford to try an appointment reminder service, ask yourself, can you afford not to?

Selecting an Automated Appointment Reminder Service

Calendar compatibility

The most important factor in selecting an appointment reminder service comes down to your calendar and scheduling application. If your scheduling software/application includes reminders with the features below, you work is done. However, one of the most cost-effective choices for calendar software (yep, free!) remains Google Calendar™. Google Calendar ™ will allow you to create multiple calendars for multiple locations and multiple associates. You can set up your appointments to automate reminders by email, but Google does not offer software for automating confirm, cancel or reschedule, nor does it offer SMS text or voice reminders. Microsoft Outlook® is still used by 30% of appointment-based professionals, and it also can automate initial reminders by email and confirmation, but it does not offer features like SMS text and voice reminders. Salesforce, the leading customer relationship management or CRM software stores contact information and appointments, but does not have a mechanism for automating client reminders. Office 365® now available on mobile devices free has the same reminder gaps as Outlook®. So regardless of your calendar, you will need an automated reminder service to work with your calendar application if you want to get the most out of your business.

Easy to use

One of the critical aspects of implementing an automated appointment reminder service is its simplicity and support. Look for services that allow you to try it first so you can test out both set-up and implementation. For a fast launch, your service should automatically extract your clients' contact information from your calendar. Services should also offer 24/7 email support in case you get stuck. Plan on fifteen minutes to get up and running with minimal customization, but allow more time, maybe as much as one hour, if you want to more carefully construct your reminder schedule, content, and follow-ups.

Versatile and customizable

Your clients are unique, and you will soon learn that they need different types of reminders to be effective. Most elderly people and students have cell phones, but don't check email. They are happy to receive reminders by SMS text. For those clients who prefer voice, they will only accept a call if they know the number, so having the service caller id number show as you number is important. Your reminder messages should allow clients to confirm, cancel or reschedule.

Often clients need more than reminders - they need information like the address, parking instructions or directions. If you don't volunteer the information, they will call your office, contributing to your office overhead. The best automated appointment reminders will allow you to include additional information. Look for other helpful features such as the ability to set conditional messages and schedule reminders for clients to make their next appointment.

Many businesses serve a mainly Hispanic client-base and are best served by sending messages in Spanish rather than English. The ideal service will offer messages in Spanish or English and allow you to customize for any language.

Instant notification

An automated appointment reminder service is not complete until it has automatically updated you calendar and notified you of your appointment's status. Look for applications that offer both SMS text and email notifications, as well as automatically updating your calendar.

There are many choices for automated reminder services out there. Keep these factors in mind and anything else unique to your business as you evaluate services. Your best bet - give the product a try. Most services believe in their product and will allow you to give it a trial run for free. Look for services that don't require a credit card to sign-up. Find more information visit www.apptoto.com.

apptoto

www.apptoto.com

Sign up for Apptoto today at no obligation.
Free trial available.
No credit card required.

AUTOMATED APPOINTMENT MESSAGING SERVICE

How does Apptoto know who to call or SMS?

Apptoto reads your Google Calendar™ or Outlook Calendar™ and looks for upcoming appointments that have phone numbers including area code in the title or body. e.g. "Fred 9254111212" or "Wilma (925)-411-1212". If it finds an appointment with a phone number then it will automatically call/sms that person based on the schedule you define (by default it will call the day before the appointment).

Apptoto can also pull phone numbers from your Google Contacts, but this feature is turned off by default. If you are interested in enabling this feature for your account, please contact support@apptoto.com

 Which calendars does Apptoto support?

Apptoto currently supports:
1. Google Calendar™
2. Microsoft Outlook™ (Apptoto plugin supports Outlook 2007, 2010, and 2013)
(download and installation required)
3. Office 365

However, we are working on support for other calendars. If you have one in mind, please email us at sales@apptoto.com. If Microsoft Exchange is what you have in mind please visit this page to tell us which provider you use.

How does Apptoto know who to email?

Just like phone numbers, simply include the email address in the title or body of the appointment. e.g. "Fred fred@yahoo.com".

Apptoto can also pull email addresses from your Google Contacts.

How do Apptoto Reminders work?

The Apptoto Reminder system is designed to reduce no-shows. It does so by calling, SMSing, and/or emailing clients and reminding them of their appointments based on a schedule you setup (e.g. call clients between 3pm and 8pm the day before appts). A client can confirm or cancel the appointment when they receive the call, SMS, or email. The call can appear to come from your caller id, and the client can hear your voice.

How does the Caller Id feature work?

For voice reminders, your clients will see your number as the Caller Id. To set this up, simply click "Add your number" on the "reminders" tab when you are logged into your account. Unfortunately, this feature does not work for SMS reminders.

Is my calendar safe with Apptoto?

Yes, Apptoto maintains secure access to your calendar and will never remove data. It will update your calendar entries for you when your clients confirm/cancel appointments, but you can turn this off if you'd prefer. Apptoto now offers a HIPAA compliant service. Apptoto will also never share your calendar data with any 3rd parties.

Are my clients reminded automatically?

Yes, once you've set up Apptoto, Apptoto will automatically call your clients and remind them of their appointments based on a schedule you define. For example, you can configure Apptoto to call 2 days before an appointment. By default, Apptoto will call 1 day before the appointment once "Auto Reminders" is turned on. If you'd prefer to manually control Apptoto, you can by scheduling reminders individually for each appointment on the "Calendars" tab.

Can I prevent Apptoto from calling certain phone numbers?

Yes, besides adding [SKIP] to calendar entries, you can also request that certain phone numbers not be called. This is useful if your calendar entries sometimes include email signatures. If you need to have a phone number blacklisted you can do so by adding that number to the "Phone Blacklist" field on the "Account" tab under "Advanced Settings".

How do I know if an appointment has been reminded?

You can log into your Apptoto account and check the status of upcoming appointments, or you can simply check your calenar. Apptoto will add "[CONFIRMED]", "[NOT COMING]", "[RESCHEDULE]", or "[REMINDED]" to the title of the appointment in your calendar.

What is the difference between [CONFIRMED] and [REMINDED]?

CONFIRMED means the client was called and pressed #1 to confirm that he or she is planning on coming. REMINDED means the client was called but did not confirm or deny the appointment. This means he or she either hung up, or the call went to voicemail.

What happens if the reminder goes to voicemail?

Apptoto repeats your message 3 times when a client answers the phone. If it happens to go to voicemail, normally the beginning of the first message is cut off, but then the second and third repetitions will be heard in their entirety. Once the message is left, Apptoto will update your calendar entry to say "[REMINDED]." If you like, you can configure Apptoto to try again later that day using the "retry" feature.

What counts as a reminder for billing purposes?

A "Reminder" in the Apptoto system includes all the phone calls, text messages, and emails necessary to remind one customer of one appointment. So, for example, if you have 3 appointments on Monday each with 1 participant, Apptoto will consider that 3 reminders. Its possible that it will actually require 7 phone calls (including retries) and 3 text messages on Sunday, but we will still consider it a total of 3 reminders used.

FAQs CONTINUED

Can you connect multiple calendars to one account?

Yes, you can add multiple calendars to one Apptoto account.

If you're using Google Calendar, then any calendar that is shared with you via Google Calendar can be added to your Apptoto account. Note that person sharing his/her calendar with you has to allow you "Make changes" through the sharing mechanism.

If you're using Outlook and you have multiple calendars on one computer or under one Outlook (Exchange) account, then you can install the Apptoto Outlook add-in on that one computer and configure each calendar separately to sync on the Apptoto Settings page. If instead, the calendars are spread across multiple computers (e.g. if you have 3 employees all using Outlook and each with their own calendar, then it works best to have the Apptoto Outlook Add-in installed on each of their computers, but signed into the same Apptoto account).

Customized settings per calendar...
Once you've added multiple calendars, each calendar will have a gear (i.e. settings) icon next to it. You can customize the messages and when they are sent for each calendar. This is very useful if you use a different calendar for each staff member for example.

Does Apptoto work outside the US and Canada?

Yes, you can use Apptoto all over the world.

apptoto

www.apptoto.com

SHOW YOUR CLIENTS HOW MUCH YOU CARE

You and your clients are juggling schedules and calendars.
Once the appointment is made, everything can still feel up in the air.
Lend your helping hand even before a client arrives at your door with
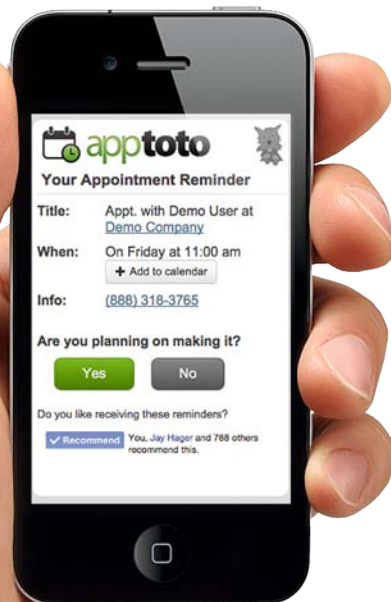**Apptoto's automated appointment messaging service**.

[PERSONAL]

• Your clients hear your voice when they are reminded of their appointments

• Clients see your phone number on their caller id when they are reminded

• Provides tailorable message templates that can include additional information such as the appointment address

"We have a complex calendar as part of our business and the Apptoto reminder service has become an important tool. It is **ultra reliable**, and if there are any issues they are dealt with promptly and professionally."

Julian Butcher
Back Straight Massage

[CONVENIENT]

• Seamlessly integrates with Google Calendar™ calendaring application and Microsoft Outlook® messaging software calendar†

• Works with multiple calendars at multiple locations to serve all your clients

• Schedules multiple reminders by SMS text, voice mail, or email

• Automatically confirms bookings, reminds clients, and sends follow-up messages

• Reminders available in Spanish and English

• Immediately notifies you if the client confirms, cancels, or reschedules through SMS text, email or voice

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apptoto
Your Appointment Reminder

Title: Appt. with Demo User at Demo Company

When: On Friday at 11:00 am
       + Add to calendar

Info: (888) 318-3765

Are you planning on making it?

Yes   No

Do you like receiving these reminders?

✓ Recommend   You, Jay Hager and 788 others recommend this.

[COST EFFECTIVE]

- Reduce no-show rates by as much as 95%
- Liberate office staff to devote their attention to other elements of your business
- Choose from several billing plans so you only pay for what you need
- 24/7 email support
- 9-5 M-F phone support

apptoto
www.apptoto.com

Sign up for Apptoto today at no obligation.
Free trial available.
No credit card required.

AUTOMATED APPOINTMENT MESSAGING SERVICE

"Apptoto is the must-have application for any professional. We all know the frustration of missing appointments on both ends. Apptoto has not only decreased scheduling confusion, it has eliminated it. It has also **eliminated the staff support and expenses** required to maintain the schedule. **The service is an incredible value.**"

Steve Nenninger
Steve Nenninger, N.M.D.

† Microsoft is a registered trademark of Microsoft Corporation in the United States and/or other countries.

![apptoto logo] www.apptoto.com

[CASE STUDY: JDKATZ ATTORNEYS AT LAW]

Welcome to JDKatz, P.C. (www.jdkatz.com), a Bethesda, Maryland-based award-winning law firm which grosses over $1 M in annual revenue. JDKatz comprises attorneys, CPAs, JD/LLM's and support staff and advises clients in the areas of tax, estate planning, real estate, corporate and litigation. Their clients span C-level executives to retirees and the aged. The firm seeks to communicate their values of trustworthiness, fidelity, care for their clients, and consistent performance in every interaction.

[OVERVIEW]

JDKatz indentified the demonstration of trustworthiness from the outset of the client relationship as key. While many law firms set a goal to make their clients feel cared for, they often lack the infrastructure to consistently convey care and concern.

The first opportunity to communicate care for clients after taking the appointment is the appointment reminder. This simple act of kindness was fraught with unanticipated pitfalls. Reminder calls were often missed, and when they did connect, clients often feared they were being billed for the personal reminder (they weren't). The result was late or missed appointments and lost office time chasing clients for rescheduling and giving directions or other information.

Founder Jeffrey Katz persevered. Jeffrey evaluated software that would automate the reminder and work with ScheduleOnce, Outlook and Google™ calendars at a reasonable price.

He chose Apptoto.

[REQUIREMENTS]

[Versatile so it serves all clients]

Apptoto sends reminders by voice, SMS text, or email. 15-20% of JDKatz' clients are elderly clients who do not have email. Many do have cell phones and appreciate the text or the voice reminder.

[Easy to use]

Apptoto is easy to use; the system is intuitive. JDKatz set it up to work with the Google™ calendar application in 15 minutes.

[Customizable reminder scheduling]

For JDKatz, text messaging has been most effective, with a couple of reminders scheduled. The last reminder is sent 30 minutes before the appointment and contains parking directions on a web page link.

[Seamless integration]

Apptoto schedules reminders for multiple calendars to serve multiple staff members and all clients.

[RESULTS]

[No more missed appointments]

Jeffrey Katz summarized Apptoto's value saying, "The solution hit it out of the park - our clients perceive our firm as accesssible, committed, showing genuine concern for their well being, and respect for their time. Reminders serve as a concrete way to demonstrate these values. Clients know that the staff is concerned about them, but that the automated call or text is not being billed to them, so they appreciate it more. We message that we are on top of their file. And It happens every time, so it communicates another JDKatz value - consistency. And it sends the message: *We care.*"

"Originally, we didn't think we could afford a reminder service, but our overall Apptoto experience has shown us that we can't afford not to have it."

Jeffrey Katz, Managing Partner
JDKatz, P.C.