



FLG

**Customer success story:
Surrey-based
automated shading
specialists, WiSER
Interiors, embrace new
Appointments feature**

The 30-year-old family business supplies and installs motorised blinds for windows, doors and roofs in commercial and residential properties in the South East and beyond. Starting with traditional shading solutions for conservatories, they've since carved a niche for themselves by adopting automation technology to help customers future-proof their homes. Alexa, close the blinds.

But such a forward-thinking company also needs a modern business process. That's why WiSER was excited to try Appointments, a new feature released earlier this year to simplify and speed up scheduling customer calls and meetings by checking availability in external calendars and allowing staff to select a convenient appointment time without having to leave the FLG platform.

"We're really pleased with Appointments, in particular the integration with Google Calendar."

Amy Milner, Customer Experience Coordinator



Customer success story: **WiSER Interiors**

Challenge

When it comes to scheduling appointments, sometimes paper diaries, whiteboards or managing multiple online calendars just doesn't cut it – it's not productive, it risks human error and it's not joined up with field-based staff. These challenges were all too familiar for WiSER, with the team booking a large volume of appointments for initial consultations, site surveys and installations.

Customer Experience Coordinator Amy Milner, whose role involves booking appointments for sales consultants, explained how she previously recorded them as events in FLG. Although this worked fairly well for them, without a calendar integration the consultants had to manually copy the details in FLG into their own diaries.

Plus, with staff regularly out on the road, there wasn't an easy way for them to keep the team updated with any changes to their schedule. With the old way of doing things, trying to manually keep FLG events in sync with external calendars was just too clunky. Keen to find a solution that would give them a complete, up-to-date view of the whole team's schedule, WiSER couldn't wait to give Appointments a try.

Solution

Launched earlier this year, [Appointments](#) became the answer to WiSER's scheduling problems. With the new feature, appointments can be made directly from a lead summary in FLG on behalf of any platform user in the organisation with a connected calendar.

It checks availability in the user's external calendar and allows the person setting the appointment to select a time without having to leave the platform. It then puts the appointment in the user's calendar and keeps the lead summary in FLG fully up-to-date with any changes, so everything stays in perfect sync.

Now when an appointment is set, a confirmation email is sent to both the customer and the assigned FLG user, composed with template variables that automatically populate the appointment details. This saves Amy and the operations team a lot of time, and field-based staff

are impressed with how convenient it is for them to quickly access the details they need when visiting a customer.

Armed with tablets, full appointment details in their diaries and a clickable link to the customer's complete communication history in FLG, they have immediate access to any information they might need as well as the ability to quickly record notes and assign tasks to be followed up and continue with the next steps.

Success

Since they started using Appointments, the team at WiSER are finding it much easier to have just one calendar open. They can now change appointments in their Google calendar by simply dragging and editing them, safe in the knowledge that everything will be kept in perfect sync with FLG.

And, because *everything* is now recorded in the FLG platform, the whole team's view of everyone else's diary is more meaningful. At a glance, any member of staff can check another team member's location and see if they're available to take a call, attend a new appointment or deal with an aftercare issue, for example.

"Appointments has really opened up capabilities in terms of planning and logistics, and the visualisation of resources from a head office point of view has been a big step forward for us."

"I've been really impressed and I'd recommend FLG to others. The support team have been very responsive and the product team have been particularly helpful, working closely with us to fine-tune Appointments following the release in beta testing."

Chris Edmeads, Head of Sales & Marketing

Why do our customers choose FLG?

Easy-to-use CRM

Manage 100,000s of leads

Automate processes

Tailored to your sales process

Personal, hands-on setup

UK-based phone support

Securely hosted in the UK

5 star Trustpilot customer rating



**For more information or
to book a demo visit
getflg.com**