



Maximize the Value of the Branch with Online Appointment Technology

As financial institutions continue to digitize, face-to-face interactions still matter. Even now, many customers choose the branch over digital channels, so it's important to make the branch experience as frictionless as possible. Enabling customers to book branch appointments at a time that's convenient for them — and making sure they interact with the right employee — is a great way to accomplish this.

Relying on walk-in traffic to drive sales is passive and inefficient.

68% service interactions



32% sales interactions

Walk-in branch interactions.*

Appointments help drive sales activity in the branch.

16% service interactions



84% sales interactions

Branch interactions booked through appointment technology.*

Online appointment-setting technology provides branches with the information needed to assign branch staffing resources appropriately — and ultimately produce more sales.

Online appointment technology supports cross-selling-of services

Tracking cross-sell metrics allows financial institutions to provide targeted cross-selling coaching to individual employees for better results. Consider an institution with 50,000 lobby interactions that had a 12% cross-sell rate from walk-in interactions and a 44% cross-sell rate from interactions booked through online appointment technology during a specific timeframe.

Employee 1

15%



Employee 2

21%



Employee 3

64%



If the institution's cross-sell rate is 56% and breaks down as shown above, it indicates that Employees 1 and 2 need coaching and feedback, while Employee 3 should be recognized for their strong results.

Optimize the branch experience

UKG Appointments lets account holders schedule appointments and gives branches the information needed to schedule the right staff at the right times to improve service levels. [Read this case study](#) to learn more about how our appointment solution can help drive sales in your branches.

*Based on a combined 240,000 branch interactions at financial institutions using both UKG Appointments and UKG Banking Connections – Sales and Service Module over a two-month period.



Our purpose is people