

# LIGHTNING SCHEDULER & ACTION PLANS

Scheduling government services should not be a struggle. The need for precision scheduling is common across all types of organizational functions from recruiting new employees, to running inspections, to managing casework. With Lightning Scheduler you can automate scheduling across the enterprise to create efficiencies and ensure appointments lead to greater impact.

## ELIMINATE PAINFUL WAIT TIMES

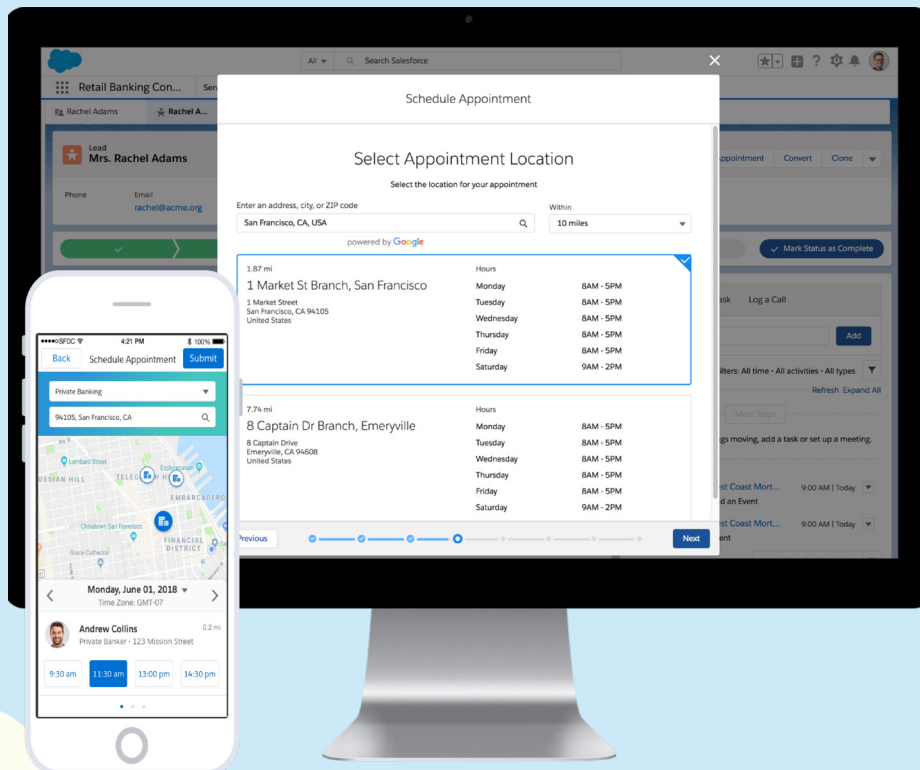
Employees can invite the right people to appointments and provide information and resources to ensure meetings are productive. Managers have greater visibility and insight into staff appointments – to see how resources are being used to meet mission needs.

With Scheduler you can:

- Connect to customers in a personalized way
- Optimize appointments and schedules
- Make appointments more purposeful

## ALIGN SCHEDULING WITH COMMON WORKFLOWS

Natively built on the Salesforce platform, Scheduler comes with Action Plans, which help you automate high-volume, repeatable processes that include scheduling. With Action Plans you can automate and launch Scheduler when customers need or require appointments.



## COMMON USE CASES

- 311/Call/Contact Center
- Case Management
- Grants Management
- Healthcare Eligibility
- HR/Recruitment
- Inspections
- Licensing & Permits

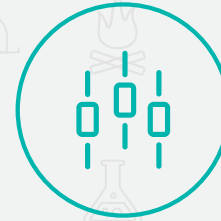
# CONNECT WITH CUSTOMERS IN A PERSONALIZED WAY

Salesforce makes it possible to use Lightning Scheduler and Action Plans within a variety of contexts. The following features allow you to meet your customers where they are on the channels they use.



## ANYONE CAN SCHEDULE

Embed Scheduler on any website, community, or digital workspace. Employees may use outbound scheduling to assist customers, while customers may use inbound scheduling to set up appointments of their choosing.



## EASY OPTIMIZATION

Eliminate scheduling complexity by building in simple rules (as easy as drag and drop) to help employees and customers engage meaningfully. Criteria may include: Criteria may include service resources, like program personnel; branch locations; and appointment type.



## COMPLIANCE

Build in the right rules to make sure your team meets compliance and quality standards while delivering consistent services. You can automatically assign owners and deadlines for tasks; ensure a task is completed before an end-user moves to the next step; and create reports and dashboards to monitor progress and ensure compliance.



## DATA ANALYTICS

With greater visibility into staff appointments and action plans you can see how your team engages customers. As you gather data you can use the information to answer questions, like:

- How well are we delivering services to customers?
- What factors are affecting our outcomes?
- How can we improve?

See how Salesforce helps government transform

To learn more about the Lightning Scheduler and Action Plans Contact your account executive or call **1-844-463-0828** today.

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