

## [CASE STUDY: BELMONT SERVICES LLC]

Welcome to Belmont Services LLC, a tax preparation service located in Columbus, OH. Belmont Services LLC serves both English- and Spanish-speaking clients. Owner Jorge Beltran and family believe that their company's success hinges on their customer care. Since Belmont and their clients have to schedule tax preparation appointments within a four month period, neither can afford a missed appointment during tax time. Their solution - automated appointment reminders and messaging.

### [OVERVIEW]

Family-owned Belmont Services LLC will see over 500 clients in a four month period of time. Missed tax appointments hurt Belmont twice. Initially, Belmont loses time and money with the missed appointment. Due to the tight schedule during tax season, a client missing an appointment may not be able to get a second appointment. Eventually, this may mean a lost client, not just a missed appointment.

Belmont was calling each customer days before the appointment, then calling again if they reached an answering machine or no response. Despite their efforts, Belmont still saw a 35-38% no-show rate.

Jorge refused to give up. He searched for more than a year for a customizable automated appointment reminder service compatible with Google™ calendar. His preference was service with pre-recorded messages in Spanish or English with flexible billing so he pays most only during tax season.

He chose Apptoto.

### [REQUIREMENTS]

#### [Versatile so it serves all clients]

Apptoto sends reminders by voice, SMS text, or email. Jorge makes use of the automated messages in both Spanish and English. Apptoto also lets Jorge create different templates so specific messages go to specific clients.

#### [Easy to use]

Apptoto automatically extracts client and appointment information stored in the Google™ calendars. Jorge had no trouble getting started.

#### [Customizable scheduling]

New clients receive additional introductory information in their reminders. Jorge schedules a reminder call, email or SMS text two days before the appointment followed by a final email or SMS text reminder two hours prior to the appointment.

#### [Seamless integration]

Apptoto automates customized reminders for all of Belmont's calendars and clients. Integrating Apptoto into Belmont's workflow was easy.

## [ RESULTS ]

### [Reduce missed appointments]

Thanks to Apptoto, Jorge has achieved his goal. No-shows at Belmont are down from 38% to 6% with Apptoto.

After 3 years using Apptoto, Jorge says there is no going back. Apptoto saves Belmont time and money. As important, Apptoto reminders strengthen their client relationships by providing a personal touch that is the hallmark of the Beltran family. With Apptoto, Belmont conveys how much they value their customers without an expensive infrastructure investment.

“My clients thank me for reminding them about their appointments. Apptoto is an essential tool that we can’t live without. It pays for itself. ”

Jorge Beltran, Owner  
Belmont Services LLC



Sign up for Apptoto today at no obligation.

**Free trial available.**

No credit card required.

**AUTOMATED APPOINTMENT MESSAGING SERVICE**