

CITK

Round Robin Calendars Appointment
Distribution Logic : CITK



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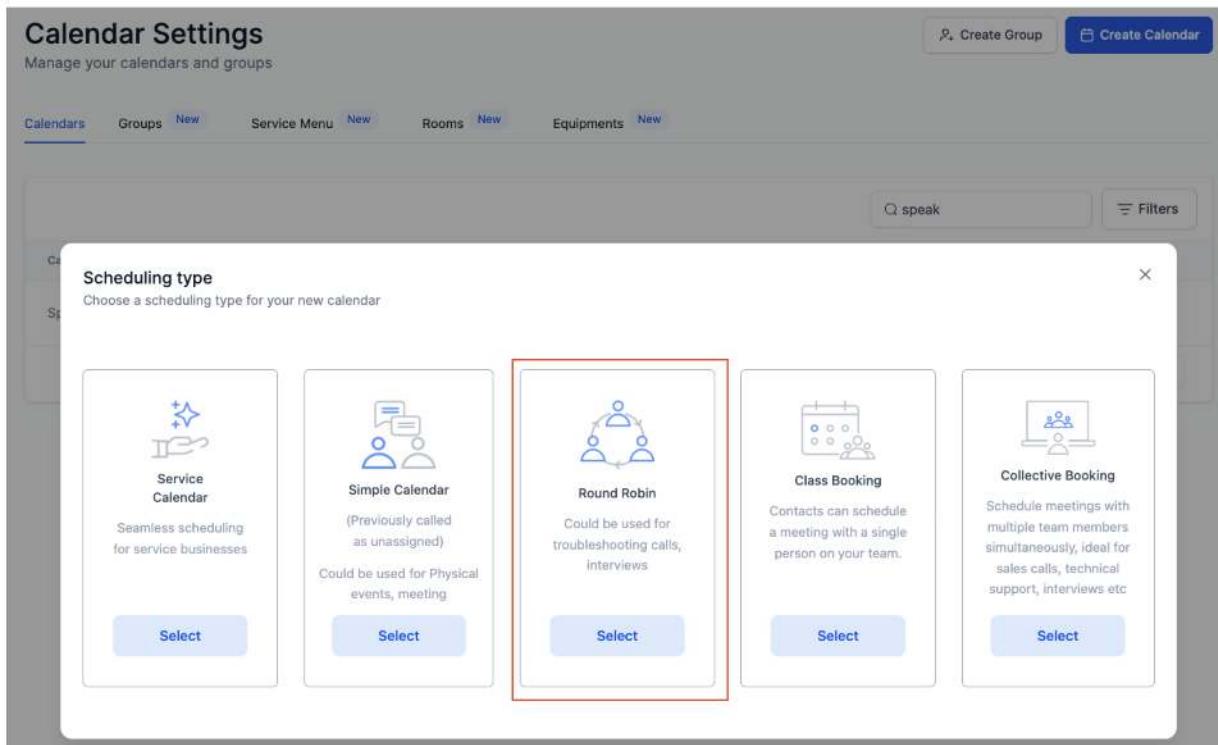
With the Round Robin Event Type, you can provide customers with more available time slots while efficiently handling your team's workload. It automatically assigns new meetings to team members, eliminating the need for manual assignments and saving you time

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How Round Robin scheduling works

When a new meeting request comes in using the Round Robin Event Type in GHL, our system checks the availability of each connected team member. GHL then automatically assigns the meeting using customizable Round Robin event logic. This means no more back-and-forth emails to confirm meeting times! This streamlined process reduces the time gap between receiving meeting requests and team members being able to follow up, making our response time even faster.

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Round Robin Calendar Logic

You can configure Round Robin automated meeting assignments in two ways:

Optimize for availability

Boosting availability is like supercharging the customer experience – it means more time options for folks wanting to meet and less time waiting around. Imagine all your team's free time slots combined into one big pool. When someone picks a time, CITK automatically hands the meeting off to the next available team member.

Now, let's say there's more than one available person at the selected time. GHL lets you decide who gets the meeting first. This cool feature helps you manage your team automatically and respond quickly, all while achieving different team goals:

1. Send meetings to someone who needs more chances to hit their monthly goal.

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2. Give a new team member a chance to build their skills or customer base.
3. Make sure reps with specific know-how are available for certain meetings.
4. Boost engagement by sending inquiries to team members who speak the preferred language.

Setting team member priorities is easy – just select the priority from the drop down next to their names when editing the Event Type. And if a few team members have the same priority, the meeting goes to the person who hasn't had a scheduled meeting in the longest time.

If there are 2 users available with the same priority in that case the system would check for the total appointments booked for the users in the last 24 hours and then whoever has lesser appointments would be picked for booking the new appointment.

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The screenshot shows the 'Meeting Details' section of the GHL interface. On the left, a sidebar lists 'Meeting Details', 'Availability', 'Forms & Payment', 'Notifications & Additional Options', and 'Customizations'. A 'Quick Tip' box on the left side of the main area states: 'To enable Gmeet functionality, make sure the team member's Google Calendar is set as their primary calendar in the settings.' The main area is titled 'Appointment Distribution' and contains two radio buttons: 'Optimize for availability' (selected) and 'Optimize for equal distribution'. Below this, a 'Select team members' dropdown shows 'Swadha Bhoj' and 'Abhishek Chauhan'. For 'Swadha Bhoj', a dropdown menu is open, showing priority levels: 'Medium Priority' (selected), 'High Priority', 'Medium Priority' (selected again with a checkmark), and 'Low Priority'. For 'Abhishek Chauhan', a dropdown menu shows 'Medium Priority' (selected) and 'Zoom'. At the bottom, an 'Event color' section displays a color palette with a checked green square.

Optimize for equal distribution

Choosing equal distribution means spreading out meetings evenly among the team. GHL keeps an eye on how many meetings each person gets. If one team member has way more meetings than the others in the last 24 hours, they won't get assigned any more until their teammates catch up.

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Custom URL *
/widget/bookings/ roundrobin-sb

Meeting invite title
{{contact.name}}

Quick Tip
To enable Gmeet functionality, make sure the team member's Google Calendar is set as their primary calendar in the settings.

Appointment Distribution
 Optimize for availability Optimize for equal distribution

Select team members
Swadha Bhoj Abhishek Chauhan

Swadha Bhoj Google Meet

Abhishek Chauhan Zoom

Event color
Event color

Opting for equal distribution ensures a fantastic customer experience while automatically balancing workloads among your team members. By evenly spreading out meeting assignments, everyone gets fair chances to connect with customers. This approach also prevents burnout by ensuring no team member is overwhelmed with too many assignments.

The system checks for the total appointments booked for the users in the last 24 hours and then whoever has lesser appointments would be picked for booking the new appointment.

When optimizing for equal distribution, some time slots may not be offered if the only available team members have received too many meetings.