

MANAGING CLIENT DEMAND: APPOINTMENTS, WALK-INS, AND SIGN-IN SOFTWARE

SEPTEMBER 23, 2026

AGENDA

- How We Manage Client Demand
- Using TablesReady
- Setting Expectations for Walk-ins
- Our Workflow
- Benefits of Our Process
- Challenges & Lessons Learned
- Q&A

HOW WE MANAGE CLIENT DEMAND

- Appointment-based during the tax season
- Accept walk-ins when capacity allows
- Do not actively promote walk-ins
- Balance appointments and walk-ins while keeping wait times manageable

HOW WE USE TABLESREADY

TablesReady serves as our digital waitlist and client management tool.
Allows us to:

**CHECK IN
SCHEDULED
APPOINTMENTS**

**ADD WALK-IN
CLIENTS TO
WAITLIST**

**VIEW THE NEXT
CLIENT BASED ON
APPOINTMENT &
ARRIVAL TIME**

**MANAGE BOTH
APPOINTMENTS &
WALK-INS IN ONE
SYSTEM**

Although designed for restaurants, it's simple, flexible, and works well for our workflow.

HOW WE USE TABLESREADY

Waitlist

Appointments

Floor Plan

Recent

Analytics

Guests

Settings

Logout

?

Prosper Center North Waitlist13

ESTIMATED CURRENT WAIT: 40 mins

Search guests

GUEST	NOTES	ESTIMATED TIME	ARRIVAL	WAIT	NOTIFY	ACTIONS
Ariel SeaRes (512) 222-2222		12:50 pm (-4 mins)	12:53 pm	0 mins	☎️💬	💬✎️❌✅
Patty CakesWalk-in (512) 333-3333	IRS Letter	12:50 pm (-4 mins)	12:49 pm	4 mins	☎️💬	💬✎️❌✅
La LloronaWalk-in (512) 222-3333	Spanish	12:52 pm (-2 mins)	12:52 pm	2 mins	☎️💬	💬✎️❌✅
John SmithRes +17371111111		1:00 pm (6 mins)	Not checked in	0 mins	▶ Check In	💬✎️❌✅
Marie SantosRes (512) 444-4445	SP	1:00 pm (6 mins)	Not checked in	0 mins	▶ Check In	💬✎️❌✅
John SmithRes (512) 506-5066		1:15 pm (21 mins)	Not checked in	0 mins	▶ Check In	💬✎️❌✅
Maria JimenezRes (888) 888-8889	1 of 2	1:15 pm (21 mins)	Not checked in	0 mins	▶ Check In	💬✎️❌✅
Amir DiabRes		1:20 pm (26 mins)	Not checked in	0 mins	▶ Check In	💬✎️❌✅

+

12:54 PM
1/10/2025

SETTING EXPECTATIONS FOR WALK-INS

When clients walk in, we:

- Explain expected wait times (15 minutes - 2 hours)
- Offer an appointment if the wait is too long
- Give clients clear options



OUR PROCESS

Keep it simple. Keep it consistent.

Workflow:

1. Acuity scheduling software for appointments
2. Export appointment data
3. Format the CSV file
4. Upload to TablesReady
 - One person uploads weekday appointments
 - One person handles weekend uploads
 - Ensures all appointments are loaded before sites open

WHAT WORKS WELL

01 One system for appointments and walk-ins

02 Easy for staff & volunteers to learn

03 Clearly identifies who should be served next

04 Better client experience (than paper sign-in sheets)

05 Nonprofit pricing from TablesReady

06 Acuity reporting helps track:

- Completed appointments
- No-shows
- Appointment utilization
- Scheduling trends

CHALLENGES & LESSONS LEARNED

01 TablesReady's nonprofit plan has limited reporting

02 Additional analytics are available upon request

03 High-volume text messaging increases costs, so we use texting sparingly

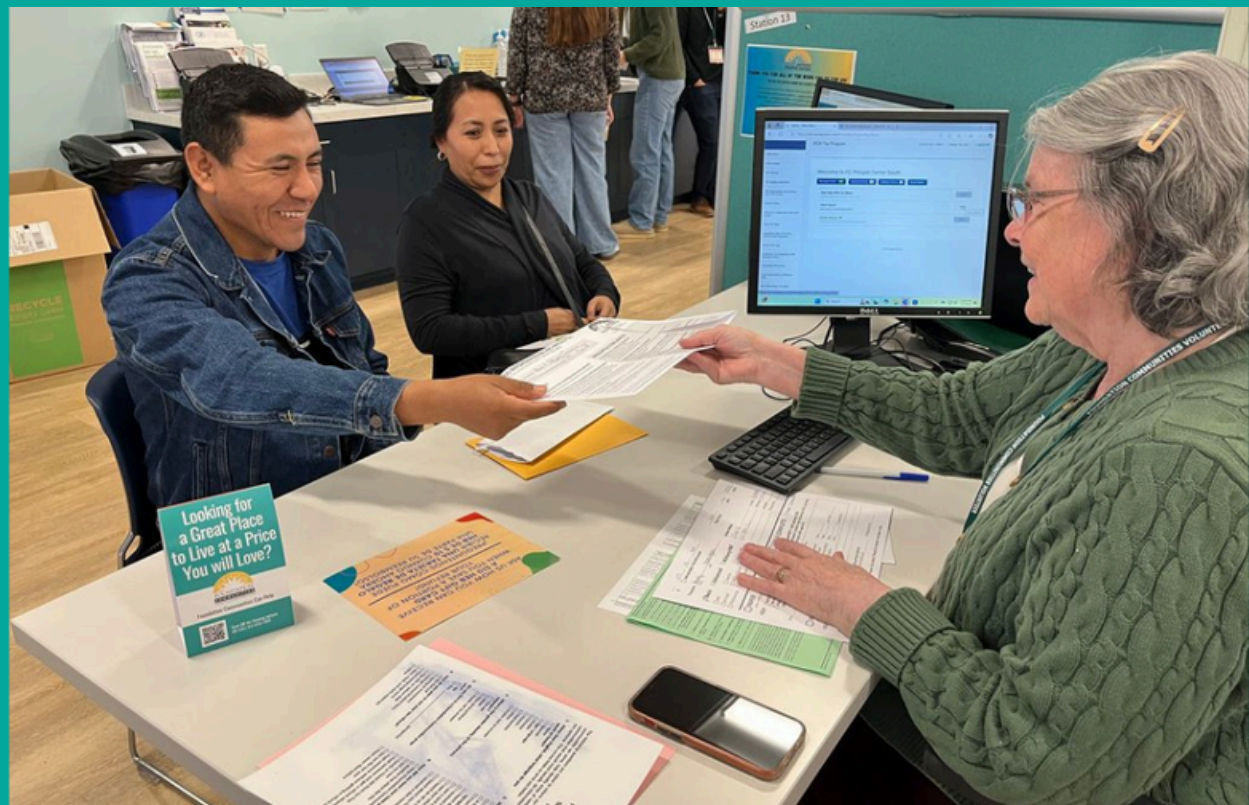
04 TablesReady works best for managing the day-of client list

05 Acuity handles appointment reminders by text and email

06 Success depends on staff consistently following the waitlist process

Q&A

QUESTIONS | COMMENTS?



THANK YOU

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