

OnceHub to offer ScheduleOnce to Cetera's network of financial professionals



FOR IMMEDIATE RELEASE

September 16, 2020, OnceHub, a leading provider of smart scheduling solutions, today announced that ScheduleOnce, its enterprise scheduling solution, has been approved as a compliant solution for Cetera's network of 8,000 financial professionals.

Cetera prides itself in offering modern tech, personalized support and championing the success of its community. Financial services is a highly regulated profession and ScheduleOnce enables financial professionals to engage clients and prospects in a manner that's efficient and meets the strict retention and security requirements required by Cetera to become a preferred provider.

ScheduleOnce's flexible and accessible scheduling solution makes it easy for clients and prospects to book face-to-face, telephone, or virtual meetings, ensuring that financial professionals can offer a seamless experience and continued high-quality professional service to their clients, even in difficult times.

ScheduleOnce eliminates the back and forth when scheduling meetings by giving clients access to their financial professionals' available time through a branded booking page. ScheduleOnce automatically sends confirmations and reminders, keeping everyone up to date with any cancellations or rescheduled meetings.

The solution allows financial professionals to create any type of meeting scenario they may need. These options include group sessions with multiple attendees, resource pools that automatically assign an available financial professional to a meeting, and panel meetings with more than one financial professional present. ScheduleOnce's comprehensive privacy and security capabilities ensure compliance with FINRA requirements.

Ladan Mirzadeh, Vice President of Marketing at Cetera said, "Productivity enhancers like ScheduleOnce allow our community of financial professionals to efficiently meet and collaborate with clients, prospects and their teams. The ability to preview calendars and schedule meetings at one's convenience is a huge efficiency driver for entrepreneurs and a differentiator in the client experience our financial professionals are able to offer."

"We are delighted to align with Cetera as they strive to help their advisors engage with their clients in the most professional and seamless manner," says Lewis McMahon, Global Director of Customer Success at OnceHub.

About OnceHub: Since 2011, OnceHub has powered organizations with appointment scheduling solutions that shorten time-to-engagement in all phases of the customer life cycle. Our scheduling software seamlessly integrates into your existing business processes and customer touch points, allowing you to connect easily with prospects and customers, ultimately leading to higher conversion rates and improved customer satisfaction.

For complete information, visit: <https://www.oncehub.com>

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