

# Cal.com

by Head of Growth

Patient Scheduling

Telehealth Platform

## Details

Review Date	01/25/2024
Purchase Date	Q3'23
Implementation Time	< 1 week
Product Still in Use	Yes
Purchase Amount	\$15/seat
Intent to Renew	30%
Review Source	Elion

## Product Rating

Product Overall	<div style="width: 80%;"><div style="width: 80%;"></div></div> 4.0
Use Case Fit	<div style="width: 100%;"><div style="width: 100%;"></div></div> 5.0
Ease of Use	<div style="width: 100%;"><div style="width: 100%;"></div></div> 5.0
API	<div style="width: 0%;"><div style="width: 0%;"></div></div> N/A
Integrations	<div style="width: 80%;"><div style="width: 80%;"></div></div> 4.0
Support	<div style="width: 80%;"><div style="width: 80%;"></div></div> 4.0
Value	<div style="width: 100%;"><div style="width: 100%;"></div></div> 5.0

## About the Reviewer

- Purchasing Team
- User
- Implementation Team
- Product Oversight

## Reviewer Organization

- Primary Care Clinic
- Primary Care
- Chronic Care

## Reviewer Tech Stack

- Cal.com

## Other Products Considered

- Acuity Scheduling

## Summary

- **Product Usage:** Cal.com is predominantly used for scheduling appointments, sending confirmations and reminders, as well as hosting telehealth visits.
- **Strengths:** The main strengths are its user-friendly interface, HIPAA compliance, and ability to manage different time zones.
- **Weaknesses:** The main concerns circle around its payment system, bugs with rescheduling and cancellations, and the inability to send automated texts without a double opt-in.
- **Overall Judgment:** While Cal.com has proven to be useful given the scale of operations, improvements related to bug fixes and the payment system are crucial for future scalability.

## Review

### **So today we're chatting about Cal.com and how it's used at your company. Before we jump into that, could you give a brief overview of the company and your role there?**

So I work for a primary care practice for complex chronic conditions. We are virtual-only to start, though likely to be hybrid in the near future. My role is everything related to growth, which for now includes a lot of operational elements because we are standing up the practice.

### **What was the need that drove you to look at Cal.com?**

We needed a scheduling tool of some sort—we didn't want to go back and forth manually via email with patients, even though our patient volume is very small right now. We were looking for one that could allow us to send a link to patients so they could self-schedule. That was the biggest need. We also needed it to be able to connect with personal calendars and block off times when our clinicians weren't available, since they're part-time and we weren't prescribing a specific calendar for them to use. It also had to have a good admin backbone so that I could see everything that was going on. It also needed to be HIPAA compliant.

The telehealth components were nice-to-have, but we were going to be okay using another platform to do that.

### **What other vendors did you look at?**

We looked at Calendly, but it wasn't HIPAA compliant. Acuity was the main competitor. They're pretty identical. It honestly had more capabilities than Cal.com, but it looked less clean and intuitive, less simple overall.

I also knew that it would be super easy to just stop using Cal.com, since we were on a month-to-month contract and the implementation time was so fast. So if we needed to switch to Acuity or someone else in the future for additional features, it would be easy to do that. And in fact, due to issues with the payment system in Cal.com, I've been looking at Acuity a bit more.

### **Did the need for a BAA change the pricing model for Cal.com?**

I don't think so. Healthcare isn't their only vertical, but it's very much a core one; they're tailored to it.

### **How did you find the sales and purchase process?**

It was good. I don't think I even needed to do a demo or anything; I don't recall talking to a salesperson.

### **What was the onboarding and kind of setup process like?**

I don't recall if we just ended up buying a seat to test, or if there was a demo period. But either way, it was super easy to get going. I just connected my calendar, booked some fake appointments, and set up some fake automations to see how they worked. It took a few hours over a day or two.

### **Could you describe the use case and workflow for the product?**

We send a scheduling link to the patient so they can come into our platform and book appointments themselves. Sometimes we will book an appointment for a patient, but it's rare. Once an appointment is booked, it triggers several automations. There's an email confirmation, and then reminder emails at 24 hours and 1 hour out from the appointment. Cal.com can send reminders via text, but it requires a two-step confirmation process, which we didn't want to do. This is inconvenient, since it seems that more people actually check their phone than their emails.

People can also reschedule and cancel their appointments directly through the Cal.com calendar invites, or I can do it through the platform. On the admin end, I can view all our upcoming appointments to see who they're with. We collect some basic information during the booking process which helps us start preparing for the appointment, and then later we send them a more robust intake form. We may build that form directly into the Cal.com booking process at some point, but for now it's separate.

We don't have payment as part of the process yet. Cal.com does have a capability for people to store their credit card info on booking, so we can charge them for no-shows, but it doesn't work. I've been working with Cal.com support to get that fixed.

When the appointment happens, we use Cal.com's in-browser telehealth system to hold the visit. The clinicians manually record the visits. I think it can record by default, but we're not doing that. When the call is finished, the recording gets downloaded and sent to the clinician; I can't have it sent to me, which is what I would prefer. And it gets deleted after 30 days, which is not ideal. There's also no transcription service built in yet, though I imagine they will add that at some point.

### **Are there any challenges scheduling across time zones?**

It's been pretty robust. We have clinicians across three time zones and our clients are in Eastern time, and it seems to have handled everything just fine. When I have to do it manually I have messed it up! But the system itself seems to handle it okay.

### **How would you characterize the usability and UI experience?**

It's really good. Very intuitive and easy. It took a bit of getting used to the way they do automations and workflows: you set them separately to the actual events, so you can reuse them for different events. But otherwise it's pretty intuitive. The clinicians seem to have picked it up fairly easily. One clinician had a bit of an issue with the scheduling mechanism, where you can set a default schedule and then overrule it for a specific day or week, but it's been good overall.

### **Is the product white labeled at all?**

We haven't done anything white labeled. The calendar invites are all Cal.com, and we're fine with that—otherwise it would be Zoom or Google Meet.

### **Have you had any issues with bugs or reliability?**

We haven't had any issues on the patient-facing end. Maybe one or two times where the recording didn't come through, but that may also have been because the clinician didn't start the recording. On the back end, there have definitely been issues with rescheduling and cancellations that I've been trying to get them to figure out. It's actually a major problem, because we have a lot of rescheduled and canceled appointments, and the updates don't always go out to the clinician or to the patient. I can see it on the back end, but they can't. I brought it up last week with them. Their customer support is very responsive, though they haven't always solved the things that I brought up!

The other main issue is with payments. It should be the case that when the clinician joins the appointment for any amount of time and the patient doesn't, it should charge a preset fee if we have a card on file. And that's not working.

### **How would you characterize the relative strengths and weaknesses of Cal.com?**

Ease of use is definitely a strength. It's easy to use it to its fullest potential, and has all the main features that we need. If the payment system were working, it would probably be sufficient for us.

A strength that is also kind of a weakness is that they do seem to be kind of small. They're responsive to needs and customer support, and I've raised features with them that they've added to their roadmap.

The weakness is definitely the bugs, and the inability to send automated texts without that double opt in. I don't know if that's a legal thing or not, I don't think Acuity had that restriction.

### **Have you built on the APIs at all?**

We're using web hooks to pull the appointments from Cal.com back into our homegrown EHR system, so that in our patients' accounts in our system, the appointments show up. We plan to use the API to do daily verifications that Cal.com and our database are in sync with each other, but haven't implemented it yet.

### **How has the account management and support experience been?**

I definitely feel like I'm heard. It's very responsive, very collegial. I talk to the same person every time. There have been some things that have slipped through and I've had to bring it up with them again, and they haven't necessarily resolved the bugs that I've brought up, but they're hearing me and working on the bugs. They've also put features I've suggested onto their roadmap.

### **Do you feel like you made the correct assessment moving forward with Cal.com?**

Yes. Certainly for the first couple months, it was absolutely what we needed given our scale and our needs. I've been able to keep a handle on the text messaging, payment, and rescheduling bugs since we're small. We wouldn't be able to scale with it though if they didn't fix those bugs.

### **Is there any specific advice you would give to the Cal.com management team?**

One tactical thing I want to call out, I would like to see more complicated admin workflows. For example, I want to get an email if certain events happen, such as if an appointment gets recorded, if there's a no-show, things like that.

In terms of high-level strategy, I'd tell them to not mess with what they have in terms of being super intuitive and easy to get started. That's definitely a strength of theirs, they just need to fix the bugs and the payment issue. That's the

only thing that Acuity seems to do better than them. If they stick to that intuitive base, they will have a very strong foundation to start doing more complicated things.

**Do you have any advice for buyers selecting this type of product right now?**

I would keep very top of mind the clinician-facing aspect of the platform. If it proves even slightly too complicated for the clinicians, you might have a real problem on your hands. It won't matter if the patient side is good.