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With Christina Hills

"How To Book Clients Online"

Hello, and welcome everyone. This is Christina Hills from the Website Marketing Workshop, and welcome to this training on how to book clients online. And what you're going to learn today can be used for free discovery calls to potential clients and/or for booking your paid client calls. And if you don't know that term, "discovery call," it's basically a free call that experts and business owners and coaches and consultants do and they have a free call with a potential client to see if they are a match. And so, we call those discovery calls. Now, this training is for doing one-on-one appointments, either on the phone or with Zoom or GoToMeeting or in person. So the training today is designed for one-on-one appointments. If you are interested in group coaching, I teach that in the Create Your Course Workshop, and you can find that at CreateYourCourse.com. Alright, so let's talk about the problem with not having an online scheduling system. Well first off, and I'm sure you've experienced this, emailing back and forth with delays - "Hey, I'd like to schedule a call with you." "Oh, I've got Monday afternoon free. Oh, wait a minute...no, that's already booked. What else do you have?" And all this back and forth with your client or potential client, time lost = money lost or maybe you have phone tag. So, you know, you, your client calls you. You're not there. They leave a message. You go back. You call them back. They're not there, and all that back and forth and back and forth and that wastes a lot of time because you think, "Oh, okay. I've got this slot open" and then you don't hear from the client and then you wind up booking something else and then they get back to you. Or wanting to book during off hours. So, maybe it's a Sunday night and you're, you are a potential client and you're looking at your week and you want to schedule your week but the person you want to book the time with, you have to call them during business hours. So, time lost = money lost. And in fact, I got the idea for this training because I wanted an easy way to schedule time to get my teeth cleaned at the dentist, and I kept wishing. I kept asking them, "Do you have online booking?" "Oh, no. We just do it on the

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phone." And I'm thinking, "Well, on a Sunday, I'm preparing my schedule and I, you know, it'd be great if I could just book the time." And I know more and more doctors are starting to do. So that is how I got the idea to do this training.

Alright. So, what am I talking about? Here's an example of one of my students. So, he is a business and life coach and you go to his site and you click on "connect with me" and up pops his calendar and you can select a day and a time, and I'm going to walk you through that process in a little bit. He can also use a standalone link. So, maybe you're not at the level yet of wanting to get something embedded on your website, well you can always give a link out. So, this is an example of the link to his booking calendar and it opens up a page that stands on its own, and then his potential clients can book time with him.

So, I'm going to walk you through the 5 steps to set up online booking, and I'll use the term "online booking" or "online scheduling" or "scheduling tools" or "booking systems." I mean it all interchangeably. So, I'm going to read through these steps and then we're going to step through each one exactly. So, first you're going to choose an online calendar system for your own calendar, you the business owner. Then you'll pick a scheduling tool that will synchronize with that calendar. Then you'll add the link for the scheduling tool to your website or get a link to email to people. Then once you have that set up, then any client or potential client can go to your website or get that link in an email, click and view the calendar and pick a date and time, and the appointment then lands on your calendar automatically, and we're going to step through each one.

So, first I'm going to start with choose an online calendar system for your own calendar. Alright? So first, we're going to pick your own online calendar and that's where the first step starts. And I know some people listening today have an online calendar and some folks don't. So there are various different digital calendars, and I'll talk about the difference between digital and an online, but here are some popular ones. I know there's probably more. Google Calendar; Apple, if you're a Mac person, Apple's iCal; Office 365 online calendar; Outlook - you

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might have Outlook on your computer; Outlook.com; Yahoo. So these three are Google, Office 365, Outlook.com, and Yahoo online are all online calendars. So, a digital calendar is on your computer versus a paper calendar. Right? Paper calendars are nice because you get to hold them and carry them around but the problem with paper calendars is they get lost. So, using a paper calendar is risky because if your calendar becomes lost, you have no backup and back in the day, people used day planners. I had a friend, she was planning her wedding. She had everything in her day planner and then she lost it and she was beside herself, running around to every single store she went into to try to find it. So, relying only on paper calendars can get you in trouble. Now, an online calendar versus a desktop calendar - so for example, Google Calendar online, here's a screenshot of it from my desktop and also you can look at your Google Calendar on your phone. So, an online calendar, you can view it from multiple devices. A desktop calendar like Outlook on a PC or iCal on a Mac desktop, it's only on that one device. Now, iCal might carry over to other devices; I'm not really sure, but this is software that is on your machine. It's not software in the Cloud. Alright, so, I want to talk about the benefits of having an online calendar. Well, you can access your online calendar from pretty much anywhere as long as there is an internet connection. Updating is fast and easy. Online calendars can send you reminders via email, popup, or texts. My Google Calendar is set to send me an email and it also does a popup on some of my appointments so that I don't forget them. And you can share your calendar with your assistants or colleagues and/or your family, if you want to. More of the benefits of an online calendar - you can change the time zone. So, when I travel from California to New York, it automatically flips in the time zone, and some calendars can display multiple time zones. You can also have various calendar profiles. I know with Google Calendar, you can do that. You can have a business calendar and then a personal calendar, and each of them can be color coded for easy identification. And many online calendars sync with other online tools flawlessly. Alright, so we use Google Calendar. It's very popular. It's probably the most popular online calendar and as you can see in this slide, I've got different colored calendars, depending on what it is and so, you might have a, like I have a calendar for my Website Creation Workshop classes and I have a calendar for my Website Marketing Workshop classes, and then I have a calendar in red when I'm doing a promotion,

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and then the calendar in green shows me the emails that we're going to send. So, you can share each calendar with different groups of people. Again, they can be viewed on multiple devices. Most booking applications do sync with Google Calendar because it is the most popular, and if you have Gmail, then you already have access to Google Calendar. It's part of your Gmail, your Google account. It's free and you can find it at [Calendar.Google.Com](https://calendar.google.com). Alright so, pick a calendar. Just, and I do have a tip for people who are not yet ready to give up their pen and paper calendar but I'm going to encourage you to pick a calendar. This is for yourself, for managing your own life and your own business. Alright? So that was step #1: Choosing an online calendar system for your own calendar.

The next step is picking a scheduling tool that will synchronize with that calendar, and the synchronization just happens automatic. So, I'm going to talk about the different tools. So, pick a tool to book your clients online. There are many, many online booking tools, and it can be hard to choose. So I picked, in this training, four that I'm familiar with but there are many others. So, just because I didn't include one that you're really thinking of doesn't mean yours that you've picked is not a good one. They're all very similar. So, you'll have to see what you need and what features you need, which ones you just like better. Alright, so let's talk about scheduling clients and these booking tools. You want to pick a tool that allows you to send a booking link to your client. Your client can view your availability at a glance, 24/7. The client books the time with you at their convenience by themselves. So there's no waiting on the phone while they go, "Hmm, well wait a minute...we're supposed to go to a party that night but wait, and that morning I had to run and do the ..." you know, it, they get to do it by themselves so you don't have to hang out on the phone. You collect money as your client books your time. Now, I have in parentheses "if applicable." Some people want the payment part to happen as part of the online booking and some people have their payment as a separate thing. So that, you'll have to decide. When your client books time, they automatically can receive any call or prep info or a document. So, some sync with Zoom and some just let you set up an email and then in the email has the link for your Zoom call. So, you want something that synchs your booking tool with your online calendar and both you and your client can automatically receive

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confirmation and reminders. So, the way it works is you pick one of the accounts and you sign up and then inside, you set up, and I'll show you some of this, your calendar rules within their interface, and I'll explain what that is. You set up any other integrations you may need, like payment info if you're going to have the booking system take payments. Most of these tools provide many features to meet your needs. So look at all the functions and decide what you're going to need. So some functions that you will need are, you know, free versus requiring payment. So maybe you only need the free. Maybe you don't need the payment to go through the booking tool. Do you need automated email reminders for you and your clients? Well, I think that's a good idea. Do you need automated text messages to you and your clients? Well, some people want to text their clients; some people don't. And then, what kind of integration with other business tools might you need? Synchronization with your work calendar, I talked about that. Rules for no weekend appointments. So the way these systems work is you say, "Don't book anybody on a Friday" Or "Don't book anybody on a Friday or Saturday" or "Don't book anybody after 5 p.m." or "Don't book anybody before 9 a.m." or "Leave a buffer of time in between calls." So, it's really nice that the system automatically does this. So, if you had an open appointment for noon and also 1, but somebody booked the noon, then the 1 would go away and maybe it's only a 1:30 appointment. Alright, so here are 4 scheduling systems that I'm going to talk about. Calendly, Acuity, vCita, and Engageware that used to be called TimeTrade. Alright. So, let's start with Calendly. This is probably the most popular and one of the reasons why I recommend it is they have a free plan. So if you're just getting rolling and you don't want to spend a lot of money on a monthly service, you can use their free plan and then later upgrade to a paid plan. It is simple and intuitive. You can have free and paid appointments. I know if you want paid appointment, then you have to upgrade to one of their, you know, pay-per-month plans. It integrates with many tools directly or via Zapier, and if you don't know what Zapier is, it's like a middleman that helps different technologies connect together. It can work with group events and teams. So maybe you are part of a team of consultants or you want to build your business to have a team of coaches or consultants, it will work with teams so each team member can have their calendar and Calendly can display the various times for the various different coaches or consultants.

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Okay, Acuity is another popular one. They are paid plans only. They do have a free trial; I think it's a couple of weeks, but they don't have a purely free system. It does have a highly customizable look. You can get text message notifications. It integrates with Zoom, GoToMeeting, Google Meet, other email marketing services and more, and you can have coupons and gift certificates with some of their plans. So, that's Acuity's scheduling. And I'm going to show you examples of different people who are using these different plans, these different systems. vCita, again another paid plan only with a free trial; I think it's a couple week free trial. VCita is kind of like a whole online marketing suite. So, it's sort of like having an online database of your clients but you'll have to look into it more. It offers various ways to let people take actions while they're online, allows you to take payments and it integrates with many platforms. So, vCita is more like a CRM, so, and if you're interested in vCita, you'll have to look at all the details because this software companies change a lot.

And this last one used to be called "TimeTrade" and as I was getting ready to do this presentation, I realized that they changed to Engageware. And you don't have to copy down these links because you are going to get a PDF with all these links and resources later. They have paid plans only but they do have a free trial. It is scalable depending upon the type and the size of the business. So there's individual packages for solo entrepreneurs and they have bigger monthly packages for bigger businesses. Right now at the time of this recording, the company is going through a transition. So, there's not a lot of product information available, as they go through this transition. The only reason why I include it is because I use TimeTrade and so, it's an example of a software, and I've used it for many years and not had any problems. I don't know exactly what's going to happen when they finish their rebranding but I'm mentioning it here.

Alright. So, once you pick the tool, and there are many others besides the ones that I talked about here, you're going to log into your account and customize it. So I'm just going to talk a little bit about this, just so your brain can have the orientation. Now in this, I happen to be in Calendly. It doesn't really matter; as long as you know what you're looking for, you'll be able to

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find it. So, this is editing of one-on-one type of event. So, it's a 45-minute coaching call. When can people book the event? Well, for 21 days. So meaning when this is set up, a person can only book 21 days out. Right? Because you don't want somebody to book 6 months from now when you don't even know exactly what your schedule is. So you get to decide how many days out a person can book. You can decide what questions you want to ask when they're booking. Workflows, that's with the paid, so I'm not going to talk about that, and it involves a bunch of automation. Notifications and cancellation policy - so you can set up what kind of email someone is going to get, what the confirmation page looks like and if you're going to set up payments for this type of call, that's where you would set it up. Now, as I'm going through this, and as I'm talking about it, I don't expect you to retain all of this in your head. So, if you're not retaining everything, don't worry about it. Let me keep going until the end. Alright, so here's an appointment rules example. So, for this type of event, and you can have different kinds of events - you can have a 45-minute event. You can have a 15-minute event. You can have a 90-minute event. You know, many coaches and consultants have different length of times that they might have clients booking time for. For this example, a person who wants to book time with you can only do it 21 days in the future, but you can set that to whatever you want or you can set it within a date range. You know, maybe you go from now until the summer because you maybe you take July off, so you want it to just be within a date range or it can go indefinitely. Some people do that. And then you can pick the duration. So this is just an example with Calendly. The other systems do something similar. This is what I was talking about. What's nice about having the software do it is you can decide do you want a buffer time between appointments? So here, it's set for 15 minutes before and 15 minutes after, so that means the system won't let back-to-back calls be booked. So, after you finish your call with your client, you'll have a 15-minute grace before the potentially next client can come in, and you can make it a half hour or maybe after your event, you want a half hour but before you only want 15. It really helps in scheduling by having these automated rules. This is from TimeTrade and so their setup is a little bit different. Remember, it's now called Engageware. I have it set to prevent same day bookings. So if today is Wednesday, nobody could book today because the system won't allow it because I like to look at my calendar the night before and say to myself,

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"Okay, what do I have going on the next day" and so by preventing same day bookings, somebody's not going to slip in an appointment when I thought I was going to be eating lunch then. And here, it's the same thing - it only goes out 3 weeks. So beyond 3 weeks, nobody can book. And then, I want send me appointment confirmation emails and then I also, I then I turned off reminder emails. So you can set that up the way you want. Right? And this is called "appointment rules." So, no matter what system you pick, they're going to have appointment rules and they'll all be somewhat similar. So that was step 2 in the 5 steps to setting up your online booking. That was picking the scheduling tool that will synchronize with your calendar.

Step 3 is adding the link for the scheduling to your website or being able to email people the link. So, we're at the "add the link for the scheduling tool to your website." So, what you want to do is you go inside your account. Once you've set up the type of appointment, then you can get a link for your scheduling page. So, here's an example from one of my students. That is the link to his scheduling page. And then, now this is where I'm talking about WordPress - if you don't use WordPress, you know, just sort of hang with me or if you don't know WordPress yet, just hang with me. But you have this link you edit, and this is with the classic editor, you type in "book a discovery call with me." You highlight it and click the little "insert link," and then you paste in that link. So, that's how to add a link to a page or a post, and then you're going to click "update" on the upper right. So, this is if you use WordPress. There's another way to get it onto your site, and that is to get "embed code." Right? And all the different systems will have a way to give you "embed code." So you want to look for something that's called "share." Right? So, look for the "share link." And this happens to be with Calendly. So, when you click on "share," then it'll give you, you want to click on the "add to website," and there's different ways that Calendly will give you to have it be on your site. So, these are the 3 ways: 1 - inline embed and I showed you that and I'll show you an example again, where it just embeds the whole calendar into your site so it just looks like it's part of the same site. Another one is a popup widget. So it adds a little floating button, like "schedule a call" and it will float, so even if people scroll, they'll see this floating button to schedule a call, and that can be pretty handy. Or you can have a popup text that generates a link that can be placed anywhere in your content, which launches

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Calendly in a popup when clicked. Right? So, that's in, it's similar to what I just showed up, and here are these like different icons; I know it's a little, it's a little tiny. Don't worry if you don't have this part memorized. Okay? Don't worry because you'll, you can revisit this. So, for the example of embedding it, right, this system in your Calendly account, you'll click to embed and here, it gives you this code and you click on "copy code." Do you have to know or understand that code? No, you don't. You just have to know how to copy and paste it into your site. So, if you're using WordPress, and this is the example with the classic editor, you would click "copy code." It will copy all of this and then in WordPress, you go to the "text" tab, and you click "paste," and that will paste that in. And then you want on, on the right-hand side, click "update." So, all that does is paste the text in and then it looks like this. So this is an embedded Calendly calendar on a website. You didn't have to be techie; you just had to know how to copy and paste something from one place to the other. So, it sounds hard because it uses the word "embed code" but it's really very easy.

Alright, so now this section is for WordPress people and if you're not fully understand, if you don't use WordPress or you don't fully, you're not at the plugin stage of understanding WordPress, just bear with me as I get through this section. So, some systems have a plugin for WordPress. So some systems, and I'll show you those, that is another way to integrate with your website but it's not always necessary, like as I showed you, they give you the code, so you really don't need a plugin. But some people want to use a plugin because maybe it's just easier. There are other WordPress plugins you can use to take appointments right on your website but it's generally not recommended to use a plugin alone without a system behind it, and I'll show you a couple, and I'll talk about that more. It's really better to pick a system like Calendly and get that integrated than a standalone. Alright, so Calendly has an "embed plugin" and it's free and you can find it at WordPress.org. Again, you don't need to have it, but you can use it. Acuity also has a plugin to integrate Acuity with your site. Again, it's free but you have to have a paid Acuity account. VCita, again, one of the others of the 4 has a free plugin but you do need a vCita account to use the plugin, and it adds this little "let's chat now," and I have an example of someone using vCita. Now, the next 2, Simply Schedule and the next one after that, this is a

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WordPress booking plugin. I happen to know the developers. They're great with documentation. It does sync with Google Calendar but it's not a third party system like Calendly and the same with Booking Calendar. This one has been around since 2009 and so you could use this straight on your WordPress site and not have a calendar system but I don't recommend it. I recommend having a third party system but I wanted to mention it anyway in case you were looking and you were wondering why I hadn't talked about it. Alright, so as I mentioned, personally we don't use WordPress booking plugins because we just the link the system gives us or the code. So you don't necessarily need a plugin at all. Alright, so that was step 3: Add the link for the scheduling tool to your website or email people the link. And I'm sure there's going to be questions about that. I'm going to keep going because the next 2 steps are pretty easy because most of your time is going to be spent kind of setting this up, but then once it's set up, you forget about it, which is the great part.

Alright, so let's walk through how the client experiences this. So, the client is going to click and view the calendar and pick a day and time. So, client views your calendar online. So, I'm going just show some examples of these 4 different systems. Again, there are other systems but once you know like what you're looking for, then you can really pick any system you want. Alright. So, the first one is with Calendly. This is John's site and when you go to his website and you click on "connect with me," then you will see embedded his Calendly and you'll click on "consultation call." Now, he could have multiple different types of calls, but right now, he just has 1 type set up. So, you click on that. Then you, as the potential client, you pick a date. So you see the calendar and you pick one of these dates that are highlighted, and then it will pop up the times that are available in your time zone. So it shows the time zone down here. If the client wants to select a different time zone, they can. The system will detect what time zone they're in but they can always change the time zone, if they want. So they find the time and then they click on "confirm." After they've confirmed the time, then the potential client puts their name and their email and any notes or requests or whatever wants to be discussed and they click on "scheduled event," and then the potential client appointment is confirmed. So it shows this confirmation. It will also automatically email a confirmation. So, I booked time with

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John. It sent me an email that I've been invited to the event and any information that I might need and it's saying it's a Zoom call and then he gives me the link to his Zoom meeting, and then at the time of the call I just click on the link. The other thing that Calendly does, and many of these systems do, is if the client needs to cancel or reschedule, right, your potential client doesn't have to call you to cancel or reschedule. They can just click and do it themselves. So that is really, really convenient. So, I just wanted to show you what that might look like when I was setting up for this presentation. So I clicked on the "reschedule." Like, I don't have to contact John. I just, here's my former time and I can just pick a new time to reschedule, and then if I wanted to cancel, there's a, it'll pop open a cancel page. I can say why I'm canceling and then click "cancel the event." So just think about how much time John has saved. Right? I've, on my own, picked out the time I want to meet with him and then I realized an hour later, oh no, I had a conflict, so I just clicked and rescheduled and he didn't have to get involved and then he will see, and I'll show an example of this, you know, my appointment with him will land in his calendar automatically. So, that is Calendly.

Next, I want to show you Acuity. Okay so, Dr. Chris Winsey, she is a coach and on her site is a page "let's talk" and "get on my schedule" so you click on that and up pops a time to pick a call. This is for a paid consultation. Now note, she is not embedding the scheduler on her website. So, let me go back. She's not embedding it like John is. Instead, you click and it pops up a window and then you can pick a time and I can see that this is a paid consultation. Here is the time zone so you can pick and then it goes on to the next step of paying with a credit card. So me, as the potential client or the client, I would pay her with a credit card and it would automatically send me the Zoom link. So, this is where, this is an example of taking payment within your scheduler system and taking the credit card when the appointment is made. But I pick the time first and then I pay. Some systems may have a person pay before they pick the time; that's really up to you. The other thing she does is she adds a link to her free consultations to her social media page. So here is her LinkedIn page, and when you go to her profile, she has a link for a 15-minute free call. She also has the link to her paid call. So, you can add these links to your social media profiles, if you want to. So, if you click on the 15-

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minute free call, right, then there's no payment involved and just pick time to have a free discovery call with her.

My next example is Sally Stone, and she is using this other system called vCita, and the reason why I'm taking the time to show you these examples is part of deciding what system to pick is seeing how it's going to look in action and sometimes these companies don't show you an example. That's why I'm showing it to you. So, you go to DrSallyStone.com and she is one of my students in the Website Marketing Workshop. She has a floating contact button and you click on it and pops up a schedule a free consult or session, and this is nice. It has a picture of her and then when you click on "schedule now," then she has all these different types of appointments you might want to do. So in the example with John, he had just set 1 up, although with Calendly, you can have multiples. Sally has, you know, restorative yoga, past life regression, near death experience, so she's got various different types of services. So you'd pick one of them. So once you pick the service, then you would pick the day and the time, and as you can see, it's in Pacific Time zone, but you could change that. So, this is what's great if you have clients all over the world. They can pick their time zone. And then you would go on, and I didn't take more screen shots, but you would go on and then pay her.

For me, using Engageware, formerly TimeTrade, I don't have the link on my website. I only give it out in email. So you don't have to embed it in your site. You can decide, hey, I'll give it out in email, maybe you have your clients on a paid retainer and maybe your consultations are included in that, and so maybe you're separating out the payment from the link. So for example, when somebody gets the link, then they click and they click on "continue" so this is a one-on-one phone consultation and then they select the, it shows these different times available. So this is how TimeTrade looks. When I first picked the system, I liked the way TimeTrade looked better than Calendly but Calendly has put more effort into their software and so now I like the way Calendly looks better. So, were I to start over, I wouldn't use TimeTrade. I would pick Calendly. So, they can see the dropdown for the different times available and then click continue and then enter. This would be the client or the potential

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client. In my case, my client would enter their name, email, phone number, company, and I had these other fields set in here and then click on "confirm." So, by having an online system, both you and your clients save a ton of time and I, I personally hate the back and forth, whether I am the consultant or whether I am the potential client. I just love the timesaving aspects of this, and that's why I'm teaching this training. Alright, so that was step 4: The client clicks and views the calendar, the scheduling and picks a date and time.

Then the last part, and I'm wrapping this up, is the appointment lands on your calendar automatically. So, this is appointment lands on your calendar automatically. Once your client or potential client goes through the online booking process on their own, the appointment will automatically add to your calendar. So, in this instance, it is Google Calendar and I look and I see, oh, I have an appointment with Janet, and then there's in my calendar is all the information that I had sent them. It automatically adds it in. So, that is really very, very convenient.

So, to recap these steps and then we'll go to questions, you want to choose an online calendar system for yourself like Google Calendar or another online calendar. You want to pick a scheduling tool that will synchronize and set it up the way you want it to work, and I showed you 4 different tools. Add the link for the scheduling tool to your website or just email people the link; give it to them privately. Then the client clicks and views the calendar on their own time, whenever they want, taking their sweet time, and they pick a date and time and then the appointment lands on your calendar automatically. There is a bonus that goes along with this training that will be coming in your email and so you can download the how to book your client online pdf. This will also be underneath the video when I get it up online, so you might just look below this video and you'll also see the pdf that goes along with this.

So that is this training from me, Christina Hills, on how to book clients online.