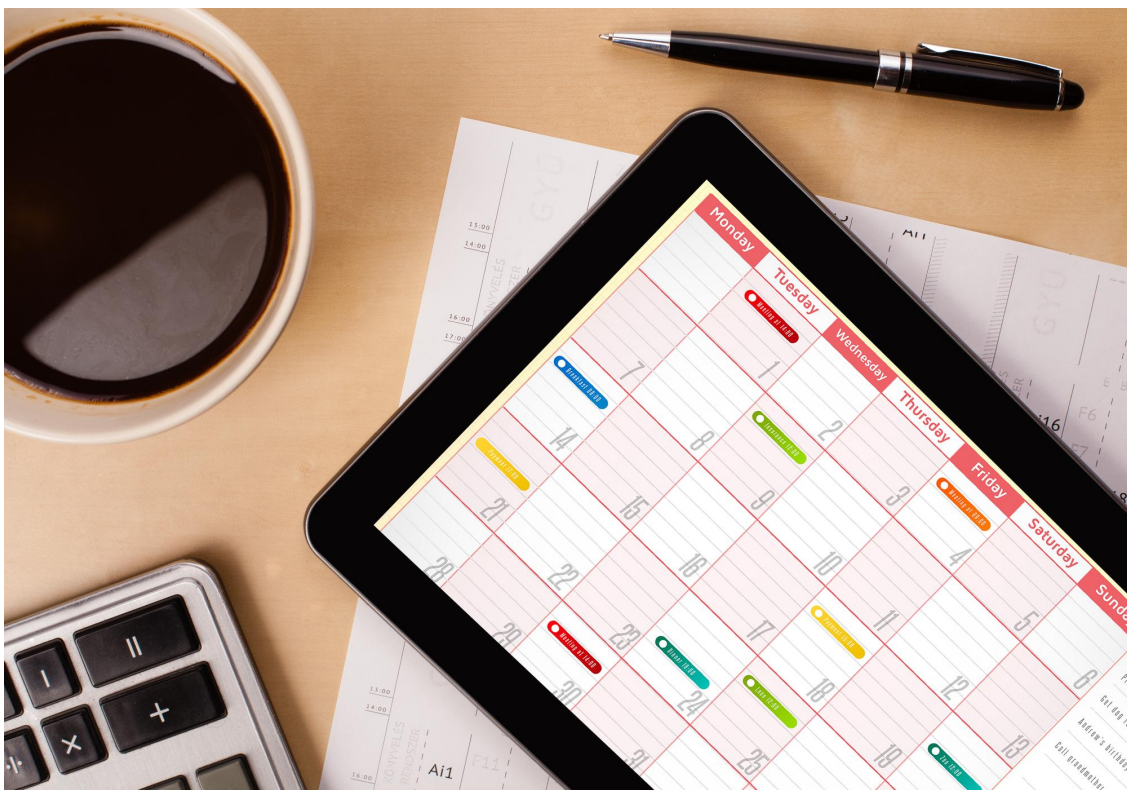# Website MARKETING Workshop

# "How to Book Clients Online"

## Checklist for Business Owners to Automate the Online Booking Process for Free or Paid Consultations



# with Christina Hills

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# Introduction

Do you schedule meetings with your clients, prospects, or even vendors?

Whether you hold in-person meetings or phone consults, setting up an appointment could be a tedious process. Phone tags, various email exchanges, or going through assistants just to find a time that is perfect for both parties can easily result in wasting time. Wouldn't you rather be working on revenue-generating projects instead?

In this training you will learn how to book your clients online for free or paid sessions. You will learn about the best tools to easily book clients online, and how to integrate that into your website. Once you start using the 'new' way of scheduling appointments, you will find your productivity goes up while your frustration level goes down!

This coursebook and checklist will help you to best decide on the tools to easily book appointments with clients and potential clients online. Once you start using the 'new' way of scheduling appointments, you will find your productivity goes up while your frustration level goes down!

This training and resources at the end of this document will help guide you get setup quickly!

To your success,

Christina Hills
Your Teacher/Mentor/Coach for WordPress
http://www.WebsiteMarketingWorkshop.com

# Steps to Setup Your Online Booking/Scheduling System

### Step 1) Choose an Online Calendar System for your own Calendar

Do you use an online calendar? If you don't, I strongly recommend using one!

Pick an online calendar that you will use for your business.  We had used Outlook's Desktop  Calendar, but then switched to Google Calendar because of its versatility.  Note that  Apple's iCal and Outlook online  are not as flexible as Google Calendar and might not sync with some online tools.  (If you don't want to use an online calendar, pick a system in step 2 anyways and use that as your online calendar).

Here are some digital calendars:

| | |
|---|---|
| Google Calendar | Google *(online)* |
| Apple Calendar | Apple |
| Office 365 | Office 365 *(online)* |
| Outlook | Outlook |
| Outlook.com | Outlook.com *(online)* |
| Yahoo | Yahoo *(online)* |

(see links below in the resources section)

*Note: Office 365 is a subscription-based suite of Microsoft products with their popular softwares, including Outlook (desktop/online) with full features. Outlook.com, on the other hand, is free, has less functions, and displays ads.*

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# The Benefits of an Online Calendar

Consider these benefits that you can enjoy with most of the online calendars out there:

- You can share your calendar with your clients, team members, and more.
- You can access your online calendar from pretty much anywhere as long as there is Internet access.
- Updating is easy and fast.
- Online calendars can send you reminders via email, popup, or text.
- It allows you to change the time zone. Some online calendars can display multiple time zones, too.
- You can have multiple calendar profiles. For example, you can have business and personal calendar profiles, each of them color-coded for easy identification.
- Many online calendar systems sync with other online tools flawlessly.

## Step 2) Pick a Scheduling Tool that will Synchronize with Your Calendar

Now that you have picked an online calendar for yourself, select an online appointment tool.  Pick from one of the ones we suggest, or find another and set up your account within their interface.  Then you will get a link that you can send your clients and prospects to your appointment page on their site directly or by including a link on your website. (see links below in the resources section)

Some of these tools have a free trial.  So, if you are looking for extra functions instead of the basic ones, you probably want to look into this option.

Think about all the features of an online booking process and determine which parts you want and need for your business.
**Here is a list of some of the functions you might want in an online booking tool:**

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- o Option to collect payment when booking with integration with PayPal / Stripe, etc. or whatever payment system you use.

- o Synchronization with your online calendar.

- o Automated booking confirmation notification for you and your clients

- o Automated email reminders for you and your clients

- o Automated text message reminders to you and your clients

- o Adding team members/staff to the account

- o Automation customizations

- o Recurring appointments

- o App for mobile devices

- o Multi-person scheduling option (helpful if you have multiple people in your organization doing consults)

- o Integration with other business tools like Zoom and GoToMeeting

- o Customization of the scheduling page

- o Options for adding the tool to your website (embed / popup / link)

- o Depth of reporting

- o Integration with other tools that you use

- o Customer support (phone, email or chat support)

## Step 3) Get the Link to Your Online Calendar & Connect it to Your

## Website  (or email people the direct link to your calendar)

Now that you have an online booking/scheduling account setup and synchronized with your calendar, you need to get the link to your booking calendar and add that link to your website, or embed it in your website

There are 3 ways to add your calendar to your website:
1) Add a link to your site that goes directly to your stand alone online scheduling/booking page
2) Get the Embed Code from the online scheduling/booking system and paste that into your website.
3) Use a WordPress Scheduling Plugin from the company of your online booking tool

**WordPress Scheduling Plugins**

There are many free and premium WordPress plugins you can use to take appointments right on your WordPress site.  We don't recommend doing that without a backend system.

Here is the list of plugins from the 3 companies we recommend:

Calendly Plugin
https://wordpress.org/plugins/embed-calendly-scheduling/

Acuity Plugin
https://wordpress.org/plugins/acuity-online-appointment-scheduling/

vCita Plugin
https://wordpress.org/plugins/meeting-scheduler-by-vcita/

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**If you decide you are NOT going to use a system, but instead a calendar plugin alone, here are a couple of calendar plugins. (not recommended)**

Simply Schedule Appointments - we recommend this the most
https://wordpress.org/plugins/simply-schedule-appointments/

Booking Calendar
https://wordpress.org/plugins/booking/

## Step 4) Client clicks and views the schedule options on the online

## Calendar and picks a date/time

Once the client gets the link or the page on your website, they can take their time picking a date and time to book on your calendar.  Some business owners offer"Discovery" calls and some have them all as paid calls. Here is an example:
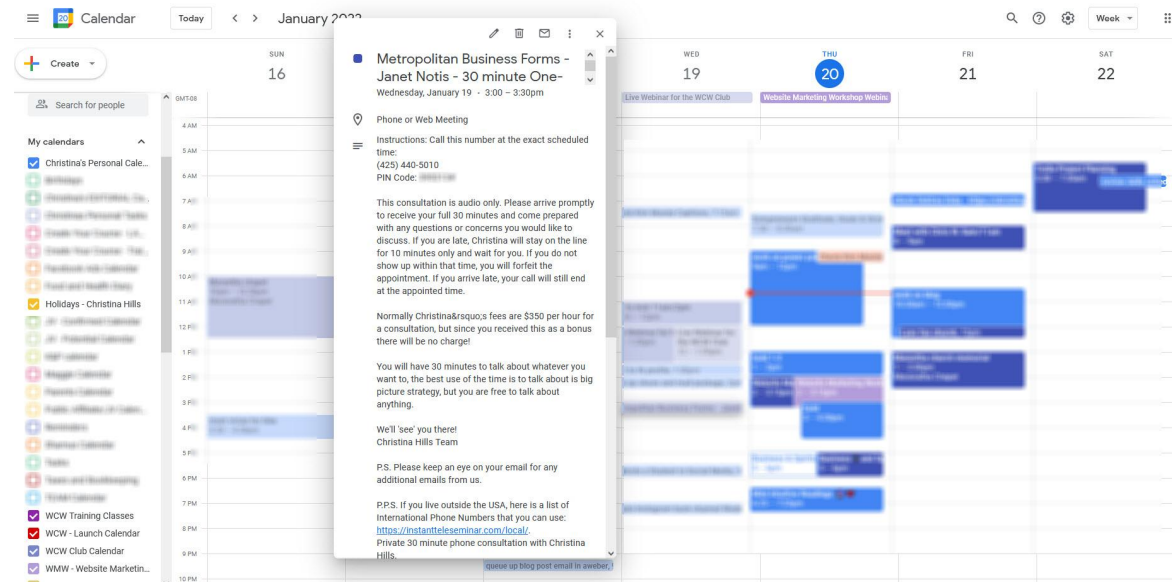
Here is an example:

# Step 5) The appointment lands on your calendar automatically!

Once you have your system up and running, you will love seeing appointments automatically land on your calendar!

# CHECKLIST

☐ **Step 1) Choose an Online Calendar System for your own Calendar**
My calendar is:

_____

☐ **Step 2) Pick a Scheduling Tool that will Synchronize with Your Calendar**
My scheduling tool is:

_____

☐ **Step 3) Add the link for the Scheduling Tool to your website**
My link for my online calendar is:

_____

☐ **Step 4) Test this step: Client clicks and views the schedule options on the online Calendar and picks a date/time**

☐ **Step 5) Test this step: The appointment lands on your calendar automatically!**

# RESOURCES

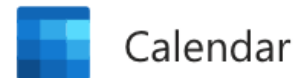## Here are a few Digital and Online Calendars

Google Calendar
https://www.google.com/calendar/

Apple iCloud Calendar
https://www.icloud.com/calendar

Outlook Calendar
https://outlook.office.com/calendar/

Microsoft 365
https://www.microsoft.com/en-us/microsoft-365
or
https://www.office.com/

Yahoo Calendar
https://calendar.yahoo.com/

## Online Scheduling Tools

Calendly
https://calendly.com/

Acuity Scheduling
https://acuityscheduling.com/

vCita
http://www.vcita.com/

Engageware (formerly TimeTrade SilverCloud)
https://engageware.com/appointment-scheduling/business-individual-editions/
https://www.timetrade.com/individual-edition/
(note this company is now in transition from old branding to new branding)

Last updated 01/27/2022