

**Each Module
Has a PDF
Checklist**



Booking Clients Online

Old Ways of Scheduling Clients

Email Back and Forth Delays

- Via Email: many email communications to book/confirm/remind, having to go through assistants



Time Lost = \$\$\$ Lost

Phone Tag with Clients

- Over the Phone: phone tags, having to go through layers of people (assistants), annoyance factor



Time Lost = \$\$\$ Lost

Pen and Paper Calendars Get Lost!

- Using Pen and Paper is risky, because if your calendar becomes lost, you have no backup!



Time Lost = \$\$\$ Lost

Booking Clients – New Way

Benefits of Online Calendars

- You can share your calendar with your clients, team members, and family.
- 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.



Benefits of Online Calendars

- You can 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.
- Some calendars can be used as an online booking tool, allowing others to book an appointment with you.
- Many syncs with other online tools flawlessly.



New Way of Scheduling Clients

- Use an **online booking tool** that allows:
 - You to simply send a booking link to your clients
 - You to sync your booking tools and your online calendar
 - You to collect money as your clients book your time (if applicable)
 - Your clients book at their convenience by themselves
 - Your clients view your availability at a glance 24/7
 - Your clients automatically receive any call-prep info/document
 - Both you and your clients can automatically receive confirmation and reminders

Time Saved = More Time to Make \$\$\$

Functions You Need?

- Free vs. requiring payment when booking.
- Synchronization with your work calendar.
- Automated email reminders for you and your clients.
- Automated text messages to you and your clients.
- Integration with other business tools.



2 Methods of Taking Appointments Online

1. Use a scheduling/appointment **plugin for WordPress**
2. Use a **3rd Party tool** separate online scheduling/appointment tool



2 Methods of Taking Appointments Online

1. Use a scheduling/appointment plugin for WordPress



Consider a scheduling/appointment plugin for WordPress

- There are many free and premium WordPress plugins you can use to take appointments right on your WordPress site. The whole booking process takes place without your prospect/clients having to leave your website.
- The features tend to be not as robust as 3rd party Tools, but if you are looking for a simple way to take appointments without having to sign up for a different service, this might be a good option for you.



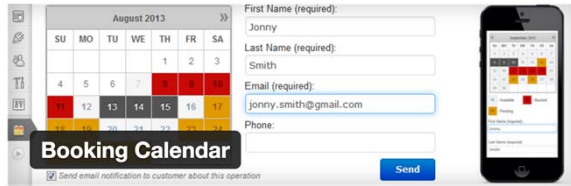
WordPress Scheduling Plugins

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

WP Simple Booking Calendar
<https://wordpress.org/plugins/wp-simple-booking-calendar/>

BirchPress Scheduler
<https://wordpress.org/plugins/birchschedule/>

WordPress Scheduling Plugins



Well-supported plugin that's been around since 2009.
<https://wordpress.org/plugins/booking/>

WordPress Scheduling Plugins



Designed with holiday home rental business in mind, showing availability very well.
<https://wordpress.org/plugins/wp-simple-booking-calendar/>

WordPress Scheduling Plugins



Feature-rich online scheduling tool. Premium version can handle eCommerce, too.
<https://wordpress.org/plugins/birchschedule/>

Personally... I don't Use WordPress Plugins for this

2 Methods of Taking Appointments Online

2. Use a 3rd Party tool separate online scheduling/appointment tool



Use a 3rd Party Separate Online Scheduling/Appointment Tool

- In this scenario, you sign up for a third-party online appointment tool, set up your account within their interface, and send your clients and prospects to your appointment page on their site directly or by including a link on your website.
- Most of these tool are not free and provides many features to meet your needs. So, if you are looking for extra functions instead of the basic ones, you probably want to look into this option.



Google Calendar

<https://calendar.google.com>

- It's **FREE!**
- You can have **different calendars** within your Calendar.
- You can **share each calendar with different group of people**
- You can use this Calendar as an **appointment booking tool**.
Most applications sync nicely with Google Calendar



Google Calendar Embedded Example



Simple Calendar - Google Calendar Plugin



<https://wordpress.org/plugins/google-calendar-events/>

Simple Calendar Plugin for Google Calendar

- Connects your Google Calendar and WordPress site.
- Displays Google Calendar with your site's look and feel.
- You can control some display functions right within the plugin.
- You need to go through the process to hook up your Google Calendar account with an API



Timetrade/PurchasePath

<http://www.timetrade.com/>

- Free version available for light users (with limited options)
- Scalable depending on the type/size of business
- For free appointments
- "Pay before booking" currently not available (possible to do if you configure your PayPal thank you page)



Acuity Scheduling

<https://acuityscheduling.com/>

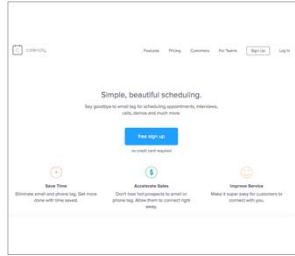
- Free version available for light users (with limited options)
- Highly customizable look
- Text message notifications
- For free and paid appointments
- Integrates with GoToMeeting, email marketing services, and more
- Coupons/gift certificates can be offered



Calendly

<https://calendly.com/>

- Free version available for light users
- Very simple and intuitive
- For free appointments
- Works with group events



Vcita

<http://vcita.com/>

- Feature-rich online appointment tool
- Offers various ways to let people take action while they are online
- Allows you to take payments
- Lets you share documents with your clients



Coaches Console

<https://coachesconsole.com/>

- A full suite of tools to manage coaching practice
- Creates customized webpages for each coaching client to log in to view calendar, book appointments, and more
- Automated reminders and client logs



Case Studies

MaryBailee.com <http://vcita.com/>

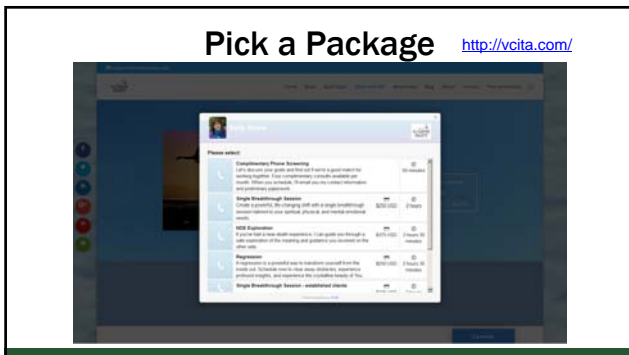


MaryBailee.com









Google Calendar Embedded Example



Consider an Online Calendar
to Book Your Clients

Website
Transformation
Workshop



with Christina Hills

Questions on
Booking Clients
Online?
