

Website
Transformation
Workshop

“Book Clients Online”

by Christina Hills

**Checklist for business owner to automate
online booking process**



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Introduction

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

Either you hold in-person meetings or phone conferences, 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 on wasting so much time in your schedule, when you could be working on revenue-generating projects instead.

This checklist will help you to best utilize the tools to easily booking clients (and anybody else you need to meet) online. Once you start using the 'new' way of scheduling appointments, you will find your productivity go up while your frustration level go down!

To your success,

Christina Hills

Christina Hills
Your Teacher/Mentor/Coach for WordPress
<http://www.WebsiteTransformationWorkshop.com>



BENEFITS OF ONLINE CALENDAR

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

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.
- 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.

The most popular Online Calendars are Google Calendar and iCal.

The benefit of Google Calendar is it works both on a Mac and a PC and a smartphone/iPhone. It's very portable!

2 MAIN METHODS OF TAKING APPOINTMENTS ONLINE

Method 1: Use 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 the method 2 below, 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.

Method 2: Use a separate 3rd Party 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.

Look at the resources pages at the end of this document and try some out!



BOOK CLIENTS ONLINE CHECKLIST

Booking Clients Online

- Review your current online booking process and determine which parts can be automated.

- List up the functions you want in an online booking tool:
 - 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.
 - _____
 - _____
 - _____

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RESOURCES

Online Scheduling Tools

Timetrade

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

The logo for Timetrade, featuring the word "timetrade" in a lowercase, sans-serif font with a trademark symbol.

Acuity Scheduling

<https://acuityscheduling.com/>



Calendly

<https://calendly.com/>



vCita

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



Square Appointments

<https://squareup.com/appointments>



Appointy

<http://appointy.com/>



Genbook

<https://www.genbook.com/>

The logo for Genbook, featuring the word "Genbook" in a lowercase, sans-serif font, with "Gen" in black and "book" in orange.

Coaches Console

<http://coachesconsole.com/>



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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/>

Simple Calendar - Google Calendar Plugin

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