

# Automation & Scheduling: Everything You Need To Know About Schedulers In Dubsado

# Contents

# Introduction

You've downloaded this freebie. That, my friend, tells me 3 things:

1. You're a business owner.
2. You *know* that automation is the way forward.
3. You're baffled with all those technical terms and buttons, which has caused major overwhelm whenever you fire up your Dubsado dashboard.

Let me tell you: you're not alone.

There are 30.2 million businesses in the United States.

Within the first year of launching, 20% of those entrepreneurs give up.

And then comes the second year, when a massive 30% fail.

It's no real surprise, is it?

You have to wear a million and one hats.

But there are a few that just don't suit you.

So, you consider outsourcing. But what if your funds are low and you don't want to take the risk? Sure, a good Personal Assistant (or Virtual Assistant) can do wonders for your business.

But that means giving someone else the reins.

If you want to remain in the driver's seat - if you want to know exactly what's going on in your business - there **is** another way. A better way.

**And you're reading about it right now.**

So, congratulations, my friend! You're 100% in the right place.

## Meet The Automater

I'm Ashleigh, and I'm a Business Automation Consultant.

Sounds pretty fancy when you put it like that.

In a nutshell, I reunite powerful women like you with their lost time, giving you space and freedom to #slayinyourline.

Essentially, I take the difficulty out of automation.

I make your business management a breeze, allowing you to spend your time on the elements that fire up your soul.

And in so many ways, we're alike.

We're both strong, independent women on a mission to change the world with our business.

How do I know? Because you're here. You're reading the words I'm typing, and you're ready to take the plunge to elevate your business for the better.

Being a service-based business owner is a hard gig, right?

Not only do you have to provide top-notch quality when you deliver, but you also have to find the time to manage and market a full-on business. That's pretty difficult when you're a solopreneur.

***Psst! A solopreneur is an entrepreneur without a team. You're 100% Jason Derulo and ridin' solo. (I'm definitely showing my age, but that song is my jam!)***

I know this because I'm in the hot seat, just like you, every day.

I see business owners spend a fortune on personal and virtual assistants every day. Sometimes their investments pay off. Other times, not so much.

When it comes to your business, **you want to know what's going on**. It's different from working as an employee because that corporation isn't your baby.

Your business, however, comes directly from you and what's within your heart. So, it's only fair that you want total visibility to make sure it's heading in the direction you planned.

I know that's resonating. And I know you're exhaling, thinking, 'OMG, I *am* normal!'

Not only is it normal, but it's the way forward. Your love for your business and determination to make it succeed have led you here.

Automating changes, not just your business, but your routine life. From the tiniest things, like being able to attend a parent-teacher meeting because you're not bogged down with admin, to the larger things, like being able to take your laptop on vacation and work on the beach with a pina colada in hand.

As a Business Automation Consultant, I give you those opportunities back. All whilst running a thriving, successful business.

Automation is the key to winning back your time, setting a professional tone, and having a healthier work-life balance. Throughout our time together - even after this guide - I'm going to show you how to make the absolute most of using automation. Because, while it may be tricky to set up at times, once you've got it right, you'll be amazed at how your life transforms.

You're able to do all the things you envisioned doing when you first launched your business without getting bogged down with admin and tedious tasks that aren't even close to your zone of genius.

That's why I love what I do so much. Of course, I love all the technical elements. But I also love watching women thrive after their automated systems and processes are set up, knowing that I've lifted a massive weight that they were struggling to carry on their shoulders.

But the world of automation is massive, and I can't cover *everything* in one guide. So, this baby focuses on one of the key elements of automation that'll make a huge change on your everyday life. And, so long as you follow the guide, you'll master it in no time.

The two of us are going to walk through setting up your scheduler on Dubsado to make your life easier and your business smoother. Your bursting love for what you do will return in full force, making sure you don't fall into the 50% fail rate.

How are we going to do this?

Easy.

Say 'goodbye' to overwhelm, double-booking, and lost appointments.

**Say 'hi' to Dubsado and automation.**

## Dubsado Scheduler = Time + Money + Thriving Business

You've obviously heard of Dubsado, or you wouldn't be here.

But, just a quick recap:

**Dubsado is a business management tool. Once you've mastered the intricacies of this, admittedly, tricky platform, you can manage projects - sending invoices and contracts with ease, set up workflows to make sure everything is automated, and track your time & expenses.**

When it comes down to it, once you understand how Dubsado works, the way it can transform your business and day-to-day life? You can't afford **not** to use Dubsado.

But, I'll be straight up and honest with you: it's not an easy thing to master.

If it were, I wouldn't do what I do.

So, that's why I'm focusing on the scheduler with you today.

There are hundreds of other topics we can cover if you're learning how to use Dubsado to the maximum, but the scheduler will show you, as soon as it's set up, how transformative this platform can be after the very first time you use it.

**The scheduler on Dubsado is a super-tool, allowing you to set up appointments with your clients.**

As a service-based business owner myself, I totally acknowledge and understand the importance of your Discovery Calls, Client Calls, Feedback Calls - or literally *any other* call you have with your prospects.

Service based businesses rely on Discovery Calls to begin the client's journey. You and I both know how crucial the booking process is for the client.

First impressions count. So, don't overwhelm them with hundreds of emails flying back and forth, trying to determine a time that works best for both of you to meet. A high number of emails between the two of you before you have even set up a call looks unprofessional, and it could cost you valuable clients.

Sending your scheduler means they can book an appointment from your available hours, allowing them to choose the right slot for them.

With the Dubsado scheduler, it cuts out any back-and-forth. Plus, it boosts your business to the next level in terms of professionalism. You're able to stick with your prospect throughout their journey, holding their hand throughout each stage, so losing them as a client is far less likely.

Like we've already been through **first impressions count**.

So, nailing those initial calls is crucial to make the sale.

How do we do that? Through research and clarity.

Once you've set up your scheduler, you can add forms to the booking process. Before you even speak to the prospect, adding a form means you can ask them for further details. Their website, perhaps. Or custom questions that'll give you an idea about who you're talking to.

As soon as the call is personalized and the prospect feels valued, the sale will be all the easier to make.

So, forms are super helpful.

Some businesses, perhaps including yours, may charge for calls.

If you're a coach, this isn't new info for you.

But how frustrating and exhausting is it to attach an invoice to an email for it to be totally ignored? And how many calls have you jumped on not knowing whether it's



been paid for or not? You've probably delivered a heap of sessions for free without even being aware of it.

Not anymore. Not with the Dubsado Scheduler.

When you've set up your template, you can guarantee that the client can't book the session until it's been paid for. Meaning, any confirmation emails you receive with an appointment have 100% been paid for.

That's just a teeny insight into what the Dubsado Scheduler can do for you as a businesswoman.

We're going to dive deep into the how, what, and why throughout this guide.

But, for now, a simple physics equation.

(Don't worry - I sucked at physics, too. This one's easy.)

**Dubsado = Time + Money + Thriving Business.**

Read that again.

## Who's The Dubsado Scheduler Best Suited To?

Dubsado transforms the lives of service based business owners, from whatever industry.

This is down to a super simple reason, which I know you, as a service-based business owner, understand:

***Service-based business owners rely on client interaction for their business to progress.***

With product-based business owners, the items they sell speak for themselves. Whereas, with you and I, we rely on how we interact with our ideal client to make the sale. Our 'product' is our bubbly, infectious, oh-so-lovely personality. And that's a top-quality product, girlfriend.

For our audience to see that, they have to book a call or an appointment with us.

Photographers, coaches, designers, marketers, social media experts, copywriters - every business owner who relies on face-to-face (whether in person or via Zoom) interaction with potential clients will reap the golden benefits of the Dubsado scheduler.

Essentially, the Dubsado Scheduler is best suited to anyone who wants to make it easy for their prospects to book a call. With such a simple process, it sets a fantastic impression from the very beginning.

So, if you're one of the many business owners who want to level up the backend of your business so the front-end is sparkingly enticing, the Dubsado Scheduler is for

you. With a flawless process in place, you'll feel confident to raise your prices to truly reflect what you're worth.

That's what the Dubsado Scheduler is all about: **more**.

**More time. More clients. More money.**

With a lot *less* stress.

## How Can The Dubsado Scheduler Work Its Magic On Your Business?

Setting up your appointment scheduler on Dubsado is real-life, Hogwarts-themed magic.

With a few taps on your keyboard and clicks of your mouse, you can make double booking disappear.

In its place, you'll conjure up additional time, replacing all that organizing and eradicating any human errors.

I speak to fempreneurs on the daily who are worried about placing their faith into an electronic system.

And I get it. When you're new to it, and you don't know what you're doing, it's scary as hell.

But I promise you, if you put your faith in me - a fellow business owner, woman, and mother - you'll gain a glimpse of the other side, which is far from frightening.

Instead, you'll see limitless potential and opportunities.

You'll see an elevated business model.

You'll see a personal assistant without the price tag.

And you'll see a new and improved version of yourself.

Because you'll have strayed from energetic chaos and self-doubt.

Instead, welcoming the beauty of automation, winning back time, and focusing on the elements that made you want to launch your business in the first place.

## How To Set Up Your Scheduler In Dubsado In 5 Simple Steps

We've put it all out there and seen the beauty of the other side. It's obvious. You need to use the Dubsado Scheduler.

But this is where business women get flustered and give up. It gets too technical and scary, so they continue wasting precious hours and return to their 'old' way of doing things.

So, I'm going to break it down into [ ] super easy steps. We'll have no one returning to old ways this time.

Ready? 'Kay. Let's go!

## 1. Build Your Appointments Scheduler Template

### **Click On Your Templates:**

Your Appointments Scheduler Template is the very best place to start. You'll find it under:

**Templates** → **Scheduler**

### **Know Your Template Type:**

Each template represents a different appointment type.

So, you'd have a different template set up for your Discovery Calls than your Client Calls.

You'll want to make sure you have a limited amount of calls that have different outcomes.

For example, a Discovery Call focuses on the very first meeting, so the topics you'll cover will contrast the things you cover in a Client Call.

So, let's base our example on a Discovery Call.

You'll then want to click **Add Template**.

Give it a name. We're going with ***Discovery Call***.

### **When Can This Appointment Be Scheduled?**

This is very much what it sounds like. You'll have 3 options to choose from:

- 1. Rolling day window**
- 2. Fixed date range**
- 3. Indefinitely**

The **rolling day window** option lets your client book an appointment within a specific time frame.

The **fixed date range** is exactly what it sounds like. It allows your client to pick an appointment slot from the start to end dates you've chosen.

The **indefinitely** option tells your client that there's no limit to how they can book and how far in advance is available.

## 2. Set Your Times

After you've picked from the 3 options above, your next step is to set your available times.

By default, Dubsado will say you're available from 9-5, Monday to Friday.

But that's not why we became business owners, right?

To edit your available time slots, you'll need to **select the day** (e.g., Monday) and adjust the times to the hours you want.

For example, you could decide you want the morning off on a Monday, meaning you'd change the time slots from 9-5 to 1 PM - 4 PM.

You'll have the choice to apply these new times to **all** of those days (i.e., all Mondays) or just that specific date.

If you choose to make those your set times for every Monday (or whichever day you're editing), it really will apply to every Monday across the year. You can edit them whenever you need them, but this is a great tool to save time.

A little tip on my end would be to use the template as your base. So, pop in your standard 'office' hours. Once you've synced your phone calendar with your Dubsado calendar, if you mark yourself as busy on your personal calendar, it'll make those appointments unavailable when clients try to book that particular time slot.

So, my bonus tip would be to **use the template for popping in your regular hours. Use your personal calendar for everything else.**

### 3. Choose What To Mark Yourself As

The next choice you'll have to make is how to mark yourself during the appointment. You'll choose between **'busy'** and **'available.'**

It's simple. Ask yourself: when a client books for this type of appointment with me (in our example, it's a discovery call), do you want the calendar to block out that time slot so no one else can book that time with you? If so, you want to mark it as 'busy.' If not, then choose 'available.'

Easy peasy, lemon squeezy.

### 4. Type In Your Location

Girl, do I have a #dubsadohack for you!

The Location slot is all about **where your appointment will take place.**

Chances are, if you're an online service provider, they'll take place on Zoom or Google Hangouts.

If you *are* going to a physical address to meet up with a client for this appointment, you can type the address in here.

But here's the hack. If you are meeting on a Zoom call, type in your Personal Meeting ID link (PMI) into the 'Location' bar. That way, it's all totally automated. You'll use the same link for every Zoom call, and you won't have to send over their unique Zoom link.

To do this, fire up Zoom on your internet browser. Sign in and click on 'Profile'.

Underneath 'Phone', you'll see 'Personal Meeting ID'. Click 'show', copy it, and paste it over into the 'Location' bar on Dubsado.

Now, *that's* using technology for ease!

## 5. Type Your Customized Email

The **email** section here only applies if you're sending your scheduler directly through a project. For most schedulers you will be sending them via direct link or sending through a workflow which will allow you to customize the email as part of the workflow build. For this reason, I do not worry about this section of the build.

If you do plan to send this scheduler as a standalone email, this is where you can customize this baby to make sure your copy is all on brand, ensuring a consistent client experience that'll wow them every time.

## The Advanced Settings

Check you out! You've nailed the basics, and you're braving the **Advanced Settings**. Doesn't that feel good?

The Advanced Settings aren't *all that* difficult to master. If you've set up the basic details following the steps above, these ones will be a breeze.

### Prevention

The first section to fill in (or you can choose not to) is the **prevention** part.

It looks like this:

***Prevent bookings less than [ ] hours in advance.***

You're going to want to use this bad boy. It's a fantastic tool to prevent being caught off guard with bookings.

Plus, if you're anything like me, you're not glued to your phone 24/7. So, chances are, you don't want someone to book on your calendar at whatever time suits them without you having *any* control over it.



I don't know about you, but I can't handle having 3 minutes to research before a call. And can you imagine your stress levels when you realize you're late for a meeting you didn't even know you had? *Especially* if that meeting was an opportunity to sign a high-paying client.

And, just like we said a few minutes ago, if you want a higher success rate from your calls, you need to put the work in. You need to make the client feel special. And how do you do that? You prioritize them. You do the research. And you come to that call prepared.

How the hell are you meant to do that if the first you've heard about this meeting is 3 minutes before they pop up on Zoom?

### **Newsflash: ya can't, boo.**

Type in the box how far in advance a client can book with you.

For example:

***Prevent bookings less than [24] hours in advance.***

This means that no one can book without 24 hours notice. So, if it's a Monday morning, you won't get crept up on with calls at 9:30 AM. They'll have to wait until Tuesday if they're booking on Monday.

### **Buffer Time**

This acts as a watered-down version of Prevention. It'll look like this:

***Create a [ ] minute window before and [ ] minute window after the appointment.***

This, as the name suggests, creates a buffer on either side of the calls. So, thinking about our 30-minute Discovery Call example, we could say that we're available from 9-12 on a Friday. If we then pop in a 10-minute buffer on either side, making it look like this:

## **Create a [10] minute window before and [10] minute window after the appointment**

It'll block you out for a total of 50 minutes.

It just means you've got extra space for calls to run over.

And, if you're going to an in-person meeting, it gives you travel time to get there and to the next appointment.

## **Increments**

Don't let the fancy language fool you. This is literally how the available time slots display themselves. You can pick between ¼'s, halves, or full hours.

It'll look like this:

**[ ] minute increments.**

Say we selected 30-minute increments:

**[30] minute increments**

Your available times would format it this way:

**Available: 9:00 AM, 9:30 AM, 10:00 AM, 10:30 AM, 11:00 AM, 11:30 AM, 12:00**

This is all about matching with your work routine, so consider it carefully before choosing.

My recommendation is to have this set for 30 minutes for any meetings that are 30 minutes or longer. Only go lower if the appointment is less than 30 minutes.

## **Appointment Details**

Here, you'll see this:

**Allow maximum [ ] appointments per day.**

If you're bombarded by the number of calls you're doing per day, this is the tool for you. You can limit the number of daily bookings people can make with you.

So, if we filled it in like this:

***Allow maximum of 4 appointments per day***

It means that the fifth person who tries to book an appointment with us on that day will be shown the next available day to book, as you'll never have to do more than 4 per day.

You can leave it blank, of course. And, if you do, you'll go all Mean Girls and tell your clients 'the limit does not exist!'. It's a great tool to use - especially if you have more calls on the daily than you can, humanistically, handle.

In this section, you'll also see this:

***Allow the scheduler to be used [ ] times.***

While the previous one works on a daily, continuous basis, this section applies to the rest of time.

So, if I were running a promotion where I was allowing 10 free Dubsado audits, I could fill this in, making it:

***Allow the scheduler to be used [10] times.***

That means that, after the tenth booker, the appointments are no longer available.

This is super for promotions or giveaways - especially if you're launching an offer on a first-come-first-served basis.

## **The Welcoming Message**

Your unique **welcoming message** will crop up when you're sending the link to your scheduler. It'll pop up at the top of the window. It's totally customizable, so have fun with it.

You could write something like:

***I can't wait to automate on your selected date!***

(Yes, I'm aware. It's lame.)

Make sure you use language that's on brand, unambiguous and concise.

And if you have time to make it rhyme, all the better!

## The Confirmation Email

When you were a kid, and you got invited to a birthday party, you'd be given an awesome invitation scattered with princesses, animals, or superheroes on them. The design was always the focal point for us kids, but for our parents, the stuff that really mattered was the date, time, and location.

(And the dress code.)

The **confirmation email** is the online equivalent.

Anyone who books a slot with you using your scheduler will automatically receive an email with all the essential details. If you choose not to customize your confirmation email, it'll send the default **canned email**.

If you want my advice, I'd always recommend you create your own to make sure your language is on-brand. Plus, people can spot an automatic email a mile away. And remember, it's all about first impressions!

If you choose to customize it (wise choice), just make sure you include all the key details using the smart filters. Remember, you want it to be as easy as a kid's birthday party invitation.

## Additional Form

You can use the **additional form** section to add questionnaires, and lead capture forms. It makes your system flawless and means you don't have to spend unnecessary time uploading them to an email, finding their email address, typing some questions, sending it, and waiting for a response.

That's all wasted time.

Instead, use this feature to add all the necessary questions or forms you need for this booking.

So, we're running with our Discovery Call example. We'll want to ask key questions that'll let us qualify the lead and know exactly what we plan to offer them during the call. It's crucial because every caller will have unique factors that make their problem different. So, if we're prepared in advance, it gives us time to explore and understand the solution we're able to offer that best suits their needs. So, we can attach a questionnaire to capture these answers before we've even hopped on Zoom.

## **Invoices**

This is precisely what it sounds like. And, it makes business so much easier - especially if you charge for your time on appointments. It'll look like this:

***[ ] require a deposit to secure a booking.***

If you slide this toggle, it means that the booking isn't processed and confirmed until it's 100% been paid for.

## **Notification**

This section states:

***[ ] set up reminder notification email.***

And it is what it says it is.

You can set up as many reminders as you'd like. If you want to set up one reminder 24 hours before the call, that's fine. If you want to set up 1 every hour until the call, that's cool too.

(Although I wouldn't recommend it!)

Just remember that reminders can't be sent manually through a project. It must be set up here.

You can edit them as many times as you'd like, but it all needs to come through this section.

***Psst! Dubsado is putting a text (SMS) reminder service in place. They're not there yet, but watch this space!***

## Monthly View

By default, Dubsado will format and display your scheduler on a weekly basis. Just like your regular calendar on your phone or your laptop, you can choose how to view it. Sliding the toggle here means you'd prefer to see it monthly, making it far more zoomed out.

This is just down to preference and what you think, aesthetically, works with your brand and routine.

## The Time Zone Game

Being an online service-based business owner means that you probably work with clients from all over the world. My team, for example, is full of people from one end of the equator to the other.

If you're going at this without a scheduler, you're constantly asking people, "where are you based? What's the time zone code? What time is it right now?" and trying to work out the difference between you. Not only does that look super unprofessional, but it eats into time you could be using to convert leads to clients.

And, if it can't be organized quickly, it's likely that your lead will simply give up, meaning you've lost, what could've been, your best client yet. That's exceedingly frustrating. My blood boils just thinking about it.

But, with the Dubsado Scheduler, your appointments will automatically adjust to the viewer's time zone. They'll see the time slots available wherever they're located in their time zone, and you'll see yours.

So, if you were based in London, England, and your available slots are:

10:30 AM, 1:30 PM, and 4:30 PM, a client in New York would see 5:30 AM, 8:30 AM, and 11:30 AM as available.

All without you having to do a thing.

More professional, less faff, and a far less frustrated lead waiting for you to change her life.

## How to send your appointment scheduler

There are 4 ways to send your Dubsado scheduler. Let's walk through each of them.

1. Embed it onto your website

I'd highly recommend embedding your scheduler onto your website.

That way, your organic traffic doesn't need to be redirected to book an appointment with you.

It's surprisingly easy to do, too.

All you have to do is click on the link icon. You can then copy your embed code and paste it straight onto an HTML building block on your website.

No coding experience required. Just 'copy' and 'paste'.

2. Send your scheduler through a link

Again, this is so simple. Follow the same steps as you would to embed your scheduler onto your website, except for, this time you're going to

copy the 'direct link' and paste it wherever you're sending from, (i.e; Facebook messenger, emails etc.)

### 3. Manually through a project

While this might take a *teeny* bit longer, in my opinion, it's the best way.

To send your scheduler manually through a project, you go into a project and click on **appointments**. Here, you'll click '**schedule an appointment**'.

Now, you can choose from a preexisting scheduling template *or* you can create a whole new one. Make your choice and hit 'send'.

It's at this point that an email will pop up for you to edit and customize.

It's a great idea to personalize the email at this point, because personalized messages convert so much better!

Once you've sent the email and your lead has confirmed it, you'll find the appointment under the 'confirmed' tab.

### 4. Through a workflow

This is a great feature if you're perfecting your process and can make the client's experience smoother.

If you don't want to publicly show your availability through your website and you're looking for only serious clients, you can funnel out the spam by setting up your scheduler within a workflow.

If you choose to send your scheduler through a workflow, it will automatically be sent at certain points of your process. You could



sharpen your system, for example, and use a trigger of '5 minutes after they've filled out a lead capture form.'

And, another bonus of sending your scheduler through a workflow is that you can use it as a trigger for future actions. For example, you could set up a process where, once your lead has booked their call, they're sent an email with your FAQs.

## How to use Dubsado schedulers effectively

Your Dubsado scheduler is meant to help you regain control of your life, both within your business *and* in your personal life. That control may have been snatched from you by overwhelming admin, setting up meetings manually, and double-booking yourself.

I've been working with business owners for a long time now, and I've seen so many entrepreneurs end up being ruled by their schedulers rather than the other way around.

And it sucks! Because your scheduler is there to help you **save time**, get more organized, and allow you to thrive in your zone of genius.

So, that ends today, my friend.

I'm going to tell you how to avoid the pitfalls, and jump right ahead to 'scheduling mastermind'. Because you should be in control of your scheduler, not the other way around.

**"I have a new routine in my life, so now I have to edit all of my schedulers."**

### **Picture this:**

It's August and the sun is shining bright. The kids are in school, and it's super important for your motivation levels to get outside. So, seeing as the weather is so beautiful, you and your bestie decide to take a stroll around the neighborhood every Thursday morning.

Before adding this routine to your life, you'd already set up your Dubsado schedulers, making you available on a Thursday for calls between 10A.M until 2PM.

Your walk is at 9AM every Thursday, and you enjoy it so much that you find yourself yearning for an extra 30 minutes to walk around the other half of the neighborhood. But you can't do that, because you've got to be back for your calls at 10AM. Your scheduler has marked you available, after all.

But, the outside is doing wonders for your mental health, and you decide to change your availability on Dubsado.

So, you sit down with a cup of coffee, knowing that this is going to be a mundane task, and you will **need** the caffeine to power through.

You plan on sifting through every single one of your Dubsado schedulers and edit your availability, so you're available from 11AM, rather than 10AM. That gives you enough time to walk around the rest of the neighborhood and be back in time for your calls.

But, my goodness: there are a *lot* of schedulers to edit.

"Wasn't this scheduler thing meant to *save* me time?" you're asking yourself.

And here's where you use your Dubsado scheduler **effectively**. Because what would've taken you at least an hour to edit can be done in less than 1 minute.

### **Here's what you do:**

You don't touch the times on your scheduler.

Instead, you're going to fire up your electronic calendar and extend your 'Thursday morning walk' event by 30 more minutes. That'll speak to your Dubsado scheduler, and tell it that you're not available until 11.

And that's it. Time, energy, effort, and a whole lot of frustration **saved**.

You're now free to take a stroll with your bestie in the August sun without rushing back.

**“I've set up a million meetings categorized according to the client and now I'm so overwhelmed.”**

**You offer 3 types of meetings:**

1. Discovery Calls
2. Coffee Chats
3. Client Calls

Rather than setting up templates for the types of calls (the 3 above), you set up individual meetings for each client, like this:

- Joanna's meeting
- Laura's meeting
- Melissa's meeting

Your business is **booming**. You're getting at least 6 discovery calls per day, and you're converting at least 50% of those leads into clients.

So, you're gaining 3 new clients every day, 15 per week, and 60 per month.

You're spending more time configuring millions of meeting types than being on the calls themselves.

**The templated meetings** are there to avoid this. You'll gain all the information you need from it, especially if you add a questionnaire to the booking page.

Plus, your meeting types are likely to last a lot longer than your clients, as you'll offboard them at some point. Your Discovery Calls, however, will always be a massive part of your client's journey and onboarding process, as you're turning leads into clients.

By setting up templated meetings, you'll only have to do it once. Do it according to the client and you'll waste a whole lot of hours - even days - setting it up and

keeping on top of it. Especially as you'll need to then delete all the work you've done setting it up when you eventually offboard your client.

**“I've set up my scheduler but I'm still sending tonnes of emails back and forth asking for project details. I feel like I'm annoying my prospect. Not to mention, it's eating every second I have.”**

**Picture this:**

A prospect books a call with you through your Dubsado scheduler. You've configured the basics, and they've followed the instructions. This could be a massive client. So, you want to make sure you're able to close the deal. You decide, then, to research the client.

Firstly, you fire up Google and type in their name. You search for their website, their Instagram, and then scour the internet for details about their product or service.

You've spent hours trying to find this person. So, you resign, and type them an email. “Hey! Super excited that you've booked a call with me. I was wondering, can you tell me...”

And then you list 20 questions.

Suddenly, that meeting gets cancelled, and you're ghosted.

Firstly, the fact that you're searching for information before you've jumped on a Discovery Call with this prospect is great. It shows that you're ready to turn this lead into a client. And knowing more about the potential project before you even talk to someone will help that prospect feel valued and heard.

That goes a long way.

However, if you're emailing the prospect back and forth asking hundreds of questions, you could be putting too much pressure on them. They may think that, rather than you helping them, you're making them work to get on a call with you.

Your future clients will enjoy talking to you about their business, but sending repetitive emails - especially if you've forgotten the answers - gives off a bad vibe.

And, let's face it, it's taking up **so** much of your time.

Luckily, there's an easy fix to make sure you never have to go out of your way to ask routine questions.

**Here's what you do:**

You make sure you attach a lead capture form to your booking system.

A lead capture form is essentially a contact form, where you can personalize the questions to discover the key elements you need to know before a call.

For example, you could add questions like:

- What's your website URL?
- What's your IG handle?
- Which of the following do you want to chat about?

Or any other question that'll help you prep for your call.

Once you've attached a lead capture form to a certain type of call, it's applied to every person who then books that type of call.

Of course, if you have more specific questions that you need to ask before the meeting, you can always send them a message. However, if you have a lead capture form, you'll find that you'll gain all of the information you need to research. That way, you can lead the juicy questions for the meeting.



## Dubsado schedulers - FAQs

As a Business Automation Consultant, I get asked questions *all* the time.

Googling your queries takes precious minutes when you could be focusing on developing your business. So, I've made a list of the most frequently asked questions about the Dubsado Scheduler and how to use them to their truest potential.

So, shut down that Google tab.

1. If my client needs to cancel or reschedule, can they do that through the Client Portal?

They absolutely can. Not only does having an online portal make your brand appear well established and professional, but it makes it so easy for your clients to make changes to their bookings.

Another added bonus of having the cancel or reschedule feature in the client portal is that so many people lose their emails. Having somewhere outside of their inbox that they can use as a reminder service lessens the chance of ghosting.

They'll find this feature in the Client Portal in their 'Upcoming Appointments' tab. It's super simple with a very clear 'cancel' and 'reschedule' option for them to pick from.

2. Where can I find a filled-out form from the scheduler?

It can be so easy to lose your forms. But, don't panic. They haven't disappeared.

If you don't have a lead capture form attached to your scheduler, but you do have it embedded on your website, the filled out form will go under the 'utilities' section. Then, click on 'address book' and select that specific client.



All of your appointments, whether they're connected to a specific client or not, will be clearly displayed in your dashboard or your calendar on the main menu.

### 3. How can I edit and personalize my canned emails for my scheduler?

50% of businesses feel that they can increase the chance of interaction with a reader if their emails are personalized.

So, can you afford *not* to customize your emails? Especially when they are directly linked to booking an appointment?

You absolutely cannot.

Plus, you want to make sure that all the messages you send out to potential clients are on brand. Everything needs to be consistent, and a massive factor is the words you choose to use.

So, naturally, you'll want to personalize and edit your canned emails.

Luckily, it's easy to do.

First, click on 'templates'. Then, hover over to 'canned emails' and click.

You'll then see the button 'edit templates'.

You can then pick the canned emails you want to customize. Just make sure you click 'save' once you're done. You don't want to spend hours writing out an email for you to lose it within a second.

#### 4. Why isn't the link to my appointment scheduler showing up in the email?

Chances are, you've probably tried to copy and paste your link into an email for the past 15 minutes.

In short, the reason why it's not showing up could be that you're trying to add your appointment scheduler to the email **after** clicking the 'send email' button. And, if that's the case: it won't work - no matter how many times you click copy and paste.

To send your appointment scheduler through a link in an email, you've got to send it through a project.

So, click on 'appointments', assign your scheduler to the project you're looking for *first* and *then* click 'send'.

You'll be given the chance to edit and customize the email.

(Read question number 3 again and make sure you personalize that message!)

Then, once you're done editing, send it.

#### 5. How do I sync my calendar to the Dubsado scheduler?

Whether you use Google, iCloud, Outlook, or Office 365, you can connect your personal, every-day calendar to the Dubsado scheduler.

That means you can block out individual days or hours for personal appointments.

Say, for example, the hours available on your Dubsado scheduler on a Monday are 9-5.

Ordinarily, that'll work just fine.

But next Monday, you have an appointment with the Doctor at 10AM.

If you hadn't synced your personal calendar to your Dubsado scheduler, people would still be able to book an appointment at 10AM that Monday. Meaning you'd have to cancel - and cancelling on your prospective clients is a big no-no.

Syncing your personal calendar is simple. Click on 'calendar' and then 'calendar settings'. Then, sync your personal calendar.

Just make sure that, after you've synced them together, you tick both the 'import' and 'export' boxes. This means that you're allowing both of your calendars to communicate with each other. It'll look like this:

***Import synced calendar events into Dubsado's dashboard.***

***Export Dubsado's calendar into synced calendar.***

## 6. My scheduler isn't showing all my available slots?

This is easily fixed. Let's look at where it went wrong.

If your scheduler isn't showing all your available dates, it's because you've got projects or events in your personal calendar that are marking you as unavailable.

While it may be irritating at the time, this is a *good* thing, because it means that it's working. This way, you can never be double booked.

That said, if you want to clear the appointments, all you have to do is head into your personal calendar and mark yourself as 'available'.

If you have zero appointments on your phone and your availability is still reduced, it could be down to a project you have on that date.

So, head to the 'projects' tab to check the dates and times listed. When you click on the dates that aren't showing in your scheduler as available, you'll see two options:

**Show me as:  available  busy**

If it's marked as 'busy', it means that no one can book an appointment at that time. So, by switching it to 'available', you open up the time slot again.

## What to sync, import, and export

Knowing the differences between these 3 key buttons is crucial if you want your Dubsado scheduler to work for you, rather than the other way around.

So, let's brush up on the basics and explore what each of these mean in context.

### Sync

To sync means to join up. When you sync your calendar, you're partnering your Dubsado scheduler and personal calendar so you can avoid double booking.

In practice, this means that, if you were heading out to watch a movie with a girlfriend on Thursday at 2pm, you could pop it into your personal calendar using your phone and Dubsado would mark that time slot as unavailable to potential bookings.

### Import And Export

While syncing is fairly straightforward and covers a more overall term, the import and export buttons lie directly underneath.

When you are syncing your Dubsado scheduler to your personal, electronic calendar, you'll see two checkboxes:

***Import synced calendar events into Dubsado's dashboard***

***Export Dubsado's calendar into synced calendar***

To sync your personal calendar and have it working for you, it means you need to get both the calendars communicating.

Importing your synced calendar events into Dubsado's dashboard means your personal events, like catching that movie we were chatting about, will show up in

your Dubsado dashboard. However, your 2PM meeting, if you haven't checked the 'Export' button, won't show up on your personal calendar.

Importing means placing information into something, while exporting takes the information and transfers it someplace else - in this case, onto your personal calendar.

You're going to want to tick both these boxes to make sure your calendars are talking to each other. It can become confusing if you tick only one of these options, and it often leads to double booking, additional stress, and a whole lot of wasted time after setting everything up!

## Known issues and workarounds

Listen, I'm going to be completely straight with you: Dubsado isn't perfect. They're working on a bunch of things to fix some common issues that're raised, and, in time, they'll absolutely nail it.

But that doesn't mean that Dubsado is useless right now. Quite the contrary, actually.

Dubsado, even with their known issues, has the power to literally transform your life and return the lost time you're grieving.

And those known issues don't *have* to stress you out the way they do for other business owners. Because I, my friend, am going to tell you exactly how to work around these pesky problems and get the Dubsado scheduler working for you.

### Issue #1: Dubsado doesn't read shared calendars

If you're a busy lady (and let's face it: you run a business. You're super busy), chances are you've set up a shared calendar with family members or friends.

It makes sense. When you're trying to be mega organized, run a business, take the kids to their appointments, *and* find time to see friends, doing it without a shared calendar can be hellish.

And if you *do* use a shared calendar, chances are you'll want to sync it to your Dubsado scheduler. Say, for example, your partner has a big, corporate work party and you have to go.

(Don't worry - hardly any of us *want* to go to those things.)

It's at 4:30PM on a Friday, which is a prime time for your Discovery Calls.

Seeing as it's his party, you didn't put it on your own calendar, which means you run the risk of someone booking a call whilst you're knocking back a few cocktails to make the night more bearable.

Not to mention if you have your own team.

Creating a shared calendar for your team is so useful, because you can pop all of the important events on one calendar and it's used by everyone. So, that team meeting on Wednesday morning doesn't need to be sent to each individual.

It'd make total sense to want to sync your shared calendars to your Dubsado scheduler, but, right now at least, Dubsado doesn't like shared calendars. It refuses to read them, in fact.

The Workaround:

Just because Dubsado's got a bee in their bonnet about shared calendars doesn't mean there's not a way to work around it.

Instead of syncing one shared calendar to your Dubsado scheduler, sync each individual calendar instead. This'll work the same way as syncing a shared calendar. While it may take a teeny bit longer to do, the end result is exactly the same.

Remember, **syncing** a calendar means they talk to each other and communicate. So, syncing 5 calendars means each of them can chat directly to your Dubsado scheduler, making it exactly the same as syncing one individual shared calendar.

Workaround: How to connect other calendars to your scheduler (specifically gmail/icalendar). What's the diff between syncing and shared?

Doesn't read shared calendars but does read synced ones.



