

1

Create Your Account



Create your free Calendly account. Use your Google Apps For Business Gmail account to sign up and you'll get access to your free trial. Upgrade to the Premium edition so that you can connect to Zapier, etc. It's around \$100 annually or \$10/mo.



Simple, beautiful scheduling.

Say goodbye to email tag for scheduling appointments, interviews, calls, demos and much more.

 [GET STARTED FOR FREE](#)

no credit card required



Save Time

Eliminate email and phone tag. Get more done with time saved.



Accelerate Sales

Don't lose hot prospects to email or phone tag. Allow them to connect right away.



Improve Service

Make it super easy for customers to connect with you.

2

Edit 'Account Settings'



Add a nice, bright headshot for your profile image. Make sure that it's easily visible and friendly when viewing via mobile. This is important as it could potentially be the first impression your prospect is getting of you.

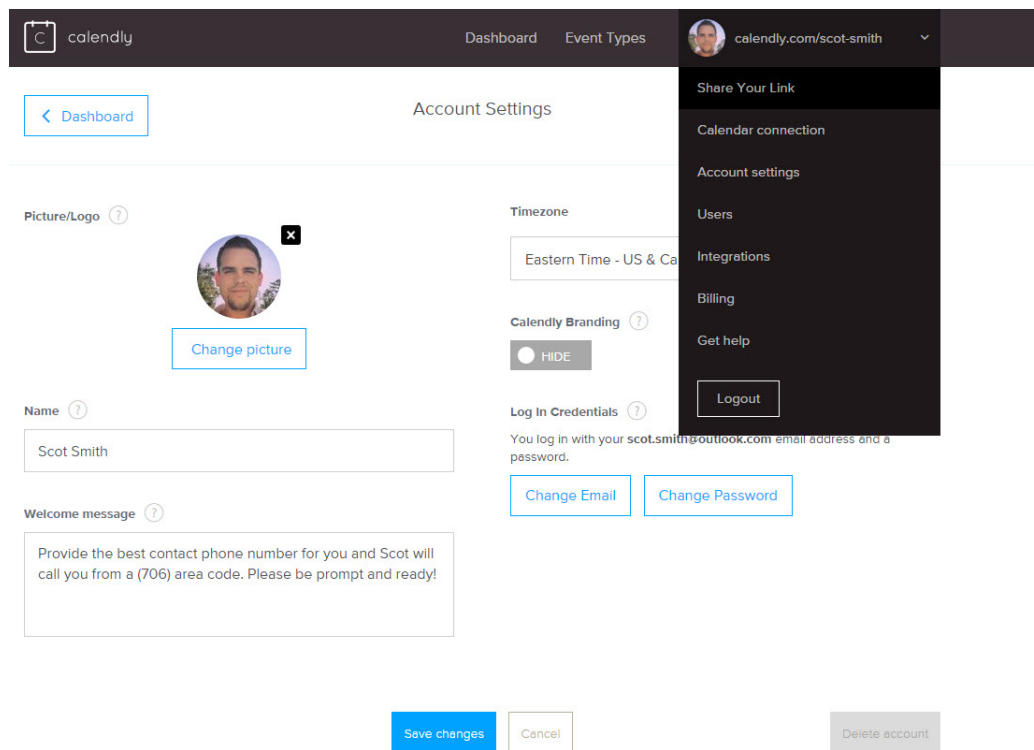
Customize your welcome message with a friendly but direct message that frames the outcome so that your prospect knows what they should do now and what happens next. Mine looks like this:

Provide the best contact phone number for you and Scot will call you from a (706) area code. Please be prompt and ready!

Notice that I also let my prospect know what number they should expect me to call from. I don't include my complete office number as I don't want to give them the option to

interrupt my schedule with an unscheduled inbound call at this point.

Set your time zone and **disable the Calendly branding**.



3 Connect Your Calender

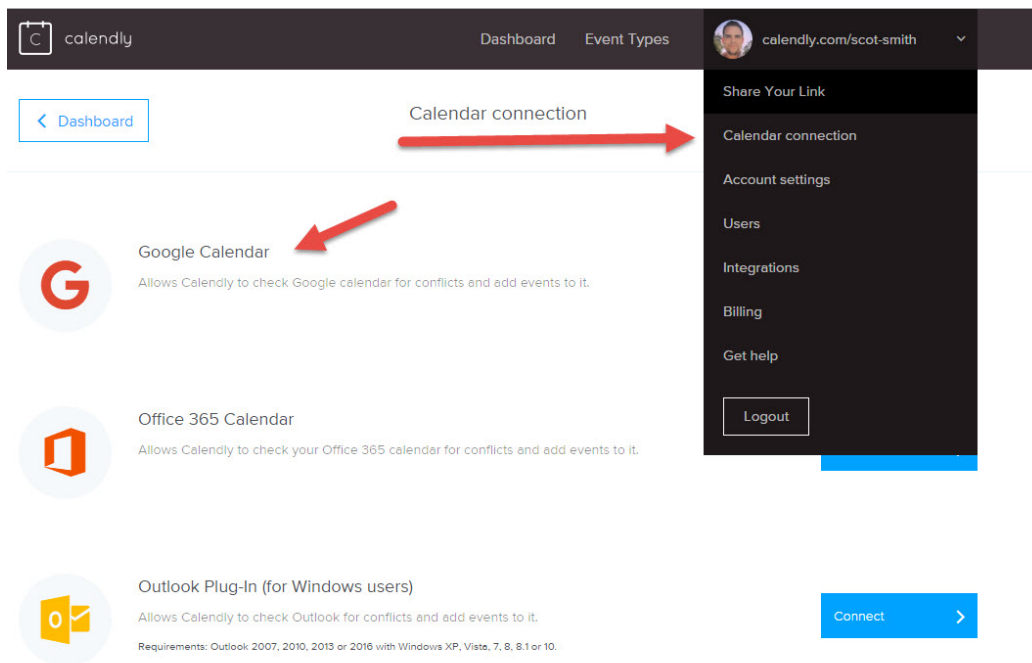


Connect your Google Calendar or your Outlook Calendar to sync with Calendly.

This is also a good time to take a quick audit of your mobile device settings to make sure that your calendar is synced with your mobile phone for notifications. I personally have a notification pop at the 15-min mark so that I'm not constantly bombarded with upcoming meeting push notifications, but I am still reminded a call is coming up, with a link to my Google Calendar where all of the prospect information is also stored.

Google Calendar syncs with my iOS contacts so that I can select

their name in my phone contacts to email or call, but I am usually calling from my desk landline/Skype.



4 Edit Event Types



This is where you're going to do a bit of customizing that will save you a lot of headaches down the line, so make sure you take the time to do this.

Choose Edit Events > 60-minute Event, then follow the directions laid out in this attached video tutorial to set up your Event for success. This is a critical step you can't skip!



[Watch Video \(https://vimeo.com/176721373\)](https://vimeo.com/176721373)



Connect Your Funnel

From here we're going to connect Calendly with our [Zapier](#) account and let Zapier do the rest of the heavy lifting.

A few things I do with all booked appointments within Zapier:

- Add them to my e-mail autoresponder list for 'booked calendly calls' so that I can be building an e-mail list/ customize the follow-up of all inbound scheduled calls.
- Add them to the appropriate stage within Pipedrive as a new opportunity.
- Search Pipedrive for that new opportunity & add a new note to that lead with the Calendly answers they've submitted, so that anyone working the lead within Pipedrive has everything they need right there within the lead details.
- Schedule a new task and assign that task to the appropriate salesperson within Pipedrive using the time scheduled in Calendly.
- Send a formatted e-mail alert with all details in the body so that I have it handy should I need the contact info in my inbox or need to alert someone else on our team.
- Add another Zap for Calendly cancelled appointments that will search Pipedrive deals and cancel the task/add a note that shows the appointment has been cancelled by prospect. Assign a new task to follow-up on rescheduling.

I also create a 301 redirect using the EPS Redirect Wordpress plugin that points directly to the Calendly event type. This is an optional touch that will let you access my Calendly 'Book Call' landing page by visiting

automatedinbound.com/schedule and just keeps things looking consistent and professional.

