Play Blueprint: Schedule Appointment Online

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Why Run It: To collect leads through having an initial appointment, consult, or phone call

Who It's For: Business owners, operators, and salespeople to handle and automate internal and external appointment setting. This play CAN be built to “do it all” – collect leads, convert clients, and create fans – based on how you choose to design and execute it

Implementation time: 20-30min

Play Snapshot

Building a campaign to schedule appointments online is a “no-brainer” for nearly ANY business. Placing appointment scheduling online allows you and your team to work internally – with suppliers and stakeholders – and externally – with prospects and clients in a professional and consistent manner that virtually eliminates missed opportunities and poor communications. Even more critically, automating the scheduling of appointments alleviates challenges with time zones, business hours, and your personal schedule.

There are two primary scenarios within this play, and while the process is the same, let’s look at some examples of why scheduling appointments online is such a perfect play:

Internal Appointments: Does your business require a tangible “hand-off” from Sales to Fulfillment? What about meetings with stakeholders or partners? By automating the appointment scheduling process, you and your team will be easier to get in touch with and you won’t find yourself sneaking out to have a Zoom call at your daughter’s recital.

External Appointments: Systemizing appointment setting is an incredibly easy “call to action” for converting leads and creating fans.   You can include a link to the Booking Form in emails or even other landing pages to capture prospects and clients when they are ready. It’s really the perfect “sales” tool that doesn’t look “salesy.”

Remember this – both of these scenarios are important, but you may find one is more suitable for your business model or team. What can’t be denied is how much easier this simple play makes it to generate sales, manage your business, and move the needle in multiple arenas of your operations. The key to successfully executing this play is to create the proper follow up once an appointment is scheduled.

Running this play consists of deciding the types of appointment you’ll need, creating the landing page, and then integrating the landing page with the booking form. From there, you’ll want to create the follow up sequence.

Pro Tip: One size doesn’t fit all! It’s far smarter and more efficient to run this play in multiple unique ways than to simply build one online appointment scheduler for any and all appointments. Some simple examples might be for internal appointments with team members and stakeholders and another for external usage by prospects and clients.   These appointments will all be scheduled on your calendar, but could originate in several places.

Quick Start Guide

Play Action Plan

Automations Bank

Measuring Success + What's Next