# GOOGLE SCHEDULING SYSTEM STEP-BY-STEP

*Hair Comes*
the BRIDE PRO

## Before You Begin

- ## Set up a New Calendar
  - You can use the Gmail account and calendar that you use for your business emails but I like the idea of setting up a new, clean calendar JUST for scheduling.

- ## Multiple Locations
  - If you are creating calendars for multiple locations you can either create one main calendar and separate the stylists by location OR set up a new calendar (and Gmail account) for each location.

- ## Set Up Gmail Accounts for Your Lead Stylists (Optional)
  - This is optional but I found it was very helpful in keeping stylists organized and communicating.
  - Use your company name of initials and then stylist's name as Gmail account (ie: Allure Bridal Beauty emails could be allure_ashley@gmail.com OR abb_ashley@gmail.com. Whatever works for you just make sure it is something fairly short and easy to remember.

## Setting Up Your Calendar

- ## Set Up a Calendar For Each Stylist
    - Within your "main" calendar, click on the plus sign (+) next to "Other Calendars"
    - Name each calendar the name of your stylist.
        - If adding several locations, add location as part of the calendar name (ie: NYC-Ashley).
        - For easy reference, you may also want to add what services each stylist does to their name. (ie: NYC-Ashley-Hair&MU)
        - Finally, you may find it helpful for booking, especially when you start hiring more stylists, to indicate the booking order for each stylist. (ie: NYC-Ashley-Hair&MU (1))
    - Once a calendar is set up for a particular stylist, share the calendar only with that particular stylist. Also change the time zone (IF necessary).
        - Click on the tab next to the calendar for that stylist.
        - Click on settings and sharing.
        - Under "share with specific people" enter their email address. Make sure that the setting is set to "see all event details" only.

- ## Create an "On-Call" Calendar
    - Create a separate "On-Call" Calendar for each location. This is the calendar that you will book help from stylists who are not on your "team" but who you just use on occasion if needed.

- ## Create a "Company Event" Calendar
    - It is helpful to create a "company" calendar where you can schedule meetings or special events.
        - Share this calendar with ALL stylists in that particular area.

## Stylist Availability

- Keeping Track of Stylist Availability
  - When keeping track of stylist availability, make your policy that THEY must tell you when they are NOT available. If they have not marked off a certain day...you CAN book them WITHOUT any notice!
  - When a stylist let's you know that they are not available on a particular day, simply click on the day and under that particular stylist's calendar write the event NO Stylist (ie: NO Ashley).
  - If the stylist is marking out for only part of a particular day, still create the event as an all day event but note the available time in the event title. This will allow you to see the availability from the calendar's month view.

## Booking Weddings

- ## When a Wedding is First Booked
  - Typically, when a wedding is first booked and secured on your calendar, you will not have all of the specific details such as timing and definite number of services, therefore, it is important to have some type of indication within the event title that the details are to be determined.
    - The easiest way to do this is to note TBD as well as estimated services.
  - Create this wedding (event) under the Lead Stylist's calendar, that is the stylist who will be doing the bride.
  - Add any relevant details that you do have such as location.
  - Add the Lead Stylist (who is doing the wedding and whose calendar the wedding is under) to the guest list so they will receive a notification.
    - NOTE: This should be in addition to your notification that you give the stylist that you have booked them a wedding. It is strongly suggested that you have a separate contract for each stylist for EACH wedding booked.

- ## Booking Help for a Wedding
  - If the estimated services are such that it is more likely than not that you will need the help of support stylists, you should book them when a wedding is first booked.
  - Duplicate the event and change the calendar setting to that of the Support Stylist (that is the stylist who will be helping lead stylist with bridesmaids).
  - Take off the Lead Stylist from the guest list and add the support stylist so they will receive an email notification.
  - I also like to indicate for easy reference in the event title...the support stylist's name and who they are helping (ie: Ashley Helping Brianna).

## Booking Weddings Cont...

- ## When Details are Confirmed OR Changed
    - Once you have received confirmation of the exact details of the wedding including timing, number of services and location, update the details in the calendar for each stylist including taking off TBD and replacing "estimated" services with "confirmed" services in the event title to indicate to everyone that the details have been confirmed.
    - When asked if you want to send email updates to guests, click on yes so that the stylist's will be updated of event detail changes. Again...I think it is a good idea to also have a standard email that you send to ALL stylists who are booked for a wedding day with the finalized details not JUST the google calendar notification.
    - Book any additional help that you may need for the wedding.

## Sharing Your Calendar

- ## Sharing with Each Stylist
  - When you first set up each calendar for each stylist and shared with that particular stylist, he/she will receive a notification and can then add their company/wedding calendar to their own calendar that they use personally.
  - You should have also shared the "Company Event" calendar with all of your stylists so they can also see details of any company events.
  - Because each stylist can only see their own particular calendar, I think it is a good idea to make the entire company calendar available for stylists so that they can see who they are working with. To do this, I suggest that you create a separate webpage on your site for your stylist's viewing only that contains the entire company calendar.

- ## Embedding Your Calendar Onto Your Website
  - Embedding an HTML code is a very basic function of just about every website application available. A quick Google search for "Embed html code" and then your website builder should do the trick (ie: "embed html into WordPress" "embed html into Squarespace", etc).
  - To get the html code of your calendar choose any calendar from your list and click on "Settings and Sharing", scroll down to "Integrate Calendar" and click on "Customize"
  - Under "Customize" you can choose what is shown on your calendar as well as change the size and finally which calendars within your main calendar you want to show. This is where, if you have several locations, you will want to separate them out by location and create a separate webpage on your site that you will embed the calendar marked ONLY with stylists and weddings from that location.

## Creating a Site to Embed Your Calendar

- Create a Free Site
  - If you are not able, for some reason to embed your calendar onto your website, there are many options available for creating a free website, my favorite being Wix.
  - You can, of course, NOT make your calendar available to stylists or create a calendar that has a shareable link but both of these options will greatly limit the features and benefits that creating an embeddable calendar will give you.
  - If you do create a site to JUST display your calendar to stylists (not for public view) you may want to take advantage of the opportunity and create a site just for your stylists that contains other company information as well.

- Create a Site Using Wix.com
  - Go to Wix.com and click on "Create a New Site"
  - Click on any option when asked "what kind of website do you want to create".
  - Click on "Create the Website with the Editor" and click on "Choose Template". Just pick anything that looks nice to you.
  - You can go through the tutorial or to create a really quick page JUST for your calendar by following these steps. :
    - Go to Menus and Pages
    - Hide ALL pre-made pages.
    - Create a new page and name it whatever you like.
    - Click "Settings" and then "Layout" and choose "No Footer or Header"
    - Click on the Add (+) button.
    - Click on "Embed" and then "html iframe" and enter code from Google Calendar that you copied.

## Using Google Calendar to Schedule H&MU Trials

- Getting Set Up
  - If you want to use your Google Calendar system for scheduling hair and makeup trials for your stylists, it is very easy to do.
  - First set up a new and separate calendar for any stylist who will be doing trials.
  - You can use the same guidelines that you did when setting up their wedding calendar including noting their location, services offered and booking order. You will want to also indicate in some way that this is their trial calendar (ie: SoCal-Ashley-TRIALS).

- Scheduling Trial Availability
  - It is suggested that you give your stylists certain guidelines for making themselves available for trials and then allowing them to make themselves available within those parameters.

- Updating Availability & Sharing
  - If you are going to allow stylists to update their availability themselves (recommended) then you will need to share each calendar with that particular stylist and under sharing options you will want to allow stylist to "make changes to events". This will allow them to add and take away days as needed.
  - If YOU are going to be updating availability for the stylists then you can just give them access to view.

- Indicating Availability
  - To indicate availability, simply create an event and title it "Stylist Available" (ie: Ashley Available).

## Scheduling H&MU Trials

- Sharing with Brides
  - You may choose to make the trial calendar available to brides so that they can easily see availability for their particular stylist. You can do this one of two ways.
    - Create a webpage for either EACH individual stylist and then go through the steps to embed the calendar only showing that stylists availability. You can then send this link to brides who are booked with that particular stylist.
    - Create a webpage for ALL stylist hair & mu trial availability and then just let your bride know whose schedule she needs to look at.
    - OR, you can make the calendar public for that particular stylist and share the Google Calendar URL link with the bride.

- Booking Trials
  - If you are using the system internally (not sharing with brides) then you now have a quick and easy reference to help book hair and makeup trials with any bride. As you are on the phone or emailing a bride, you can simply let them know the stylist's availability.
  - If you are making the calendar available to brides, they can choose a date/time that works for them and let you know.
  - When you are ready to book a trial, simply click on the available day/time and update the details with the bride's information.
  - Add the stylist AND the bride to the guest list so that they will both be notified of the appointment.

- **NOTE**: When using this system at HCTB, we did eventually switch from using Google Calendar to using a scheduling app (Timetrade.com) so that brides could schedule appointments directly with no middleman. This is something that I will go into in another video at another time.

## Creating a Calendar with a Shareable Link

- ## If you DON'T Want to Embed Your Calendar
  - I have mentioned several times how many benefits there are to creating a calendar that can be embedded BUT if for some reason, you do not want to embed your calendar but you DO want to be able to share it, you can create a calendar and then simply share the link.
  - If you do want to do it this way, you will only be using one MAIN calendar, you will NOT set up a calendar for each stylist.
  - Under your main calendar, you can use the same system that I have already shown you but with one main difference...you will need to note the stylist on the event details for each event.
  - Note, that you will also NOT have the benefit of individual color coding per stylist. You can assign your own color coding but will have to create a system to keep track of what each color represents.

- ## Sharing Your Calendar
  - Once you have created your calendar and started booking events, in order to share with your stylists, you simply need to go to "settings and sharing" and then "integrate calendar" and find the URL link. This link can be shared with stylists.
  - NOTE: You MUST make the calendar public under "settings and sharing" in order for it to be viewed.

# NOTES

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