



Take charge of your practice in the New Year!
January 2019
Brought to you by:



Your Hosts



Liz Scott
Accounting Lifeline



Heather Satterley
Satterley Training & Consulting

Thank you to
this month's
sponsor!



Agenda

- Welcome!
- Take charge of your practice in the New Year
- Apps to Manage your calendar
- Let's raise a toast! This month's app sponsor: LivePlan!
- Heather and Liz's coolest thing we did this month special addition:
Epic App Fails – Episode 1

Welcome!

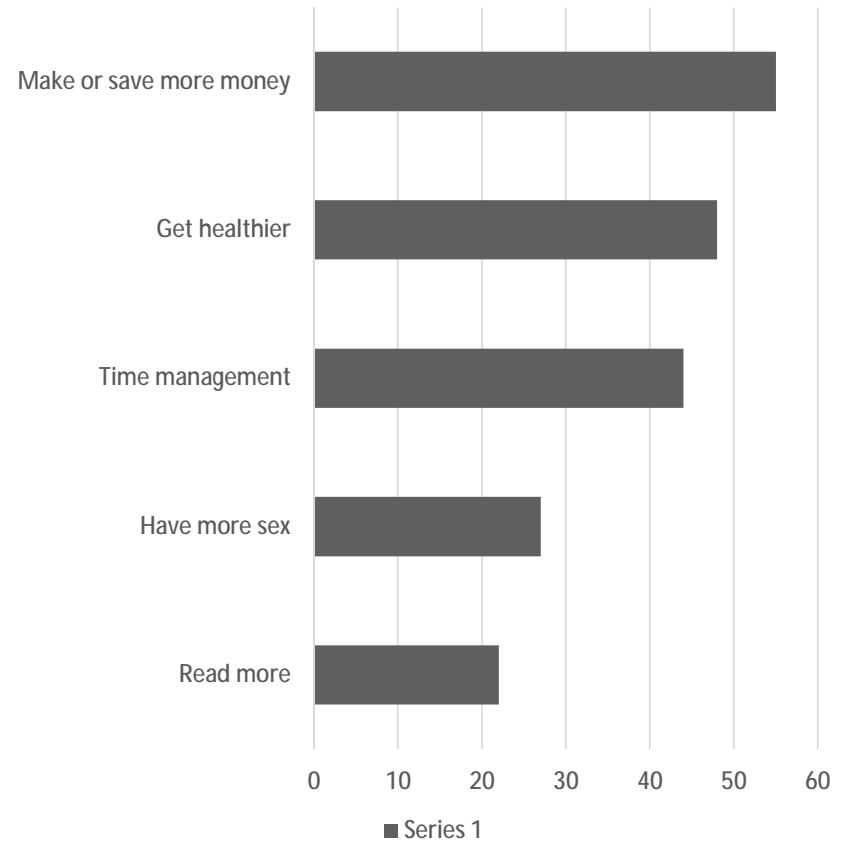
- Like us on Facebook - <https://www.facebook.com>
- Follow us on Twitter - @qbappyhour
- Join The QB 'Appy Hour Lounge Facebook Group
<https://www.facebook.com/groups/qbappyhour/>
- Register for the monthly webinar on Zoom
- Thank you for spending an hour getting 'appy with us!



Take Charge of Your Practice in the New year!



New Year's Resolution Statistics





New Year's Resolutions Tips

1. Change the way you talk about your new activities i.e. "This is what I do on Mondays"
2. Accountability groups
3. Set rewards in the beginning for each goal



Time Management

Consider a Calendar App for booking appointments!

Scheduling App Comparison-Jan 2019

*Included in paid
version only



Mobile App	✗	✓
Web Conferencing Integration	Zoom* GoToMeeting*	Zoom* GoToMeeting* Join.me*
Notifications	Email, Text*	Email, Text*
Multiple Appointment Types	✓*	✓
Calendar Integrations	Google Calendar, Outlook, iCloud, Office 365	Google Calendar*, Outlook*, iCloud*, Office 365*, MS Exchange*
Embedded Scheduler Link	✓	✓*
Payments Integration	Stripe*, PayPal*	Stripe*, PayPal*, Square*, Braintree*, Authorize.net*
Price	Up to 12/month Per user	Up to 50/month Unlimited users

Liz Chose Calendly



Free Version had all the features I needed:

- Calendar Integration with free version!
- Scheduling link on website and email
- Email Notification
- Easy to create meeting types with booking preferences
- Created work around for Web-Conferencing Integration with Zoom

Calendly Booking an Appointment



Liz Scott

Accounting Lifeline

Intuit Trainer Writer Network

Contributing Author for Insightful Accountant



www.AccountingLifelineOK.com

[Click here to securely share a file.](#)

[Click here to schedule a meeting.](#)



Liz Scott

60 Minute Meeting
Times are in Central Time - US & Canada (10:20am)

Need QuickBooks support?
<https://zoom.us/j/4116951891>

Select a Day

Wed
Jan 9
unavailable

Thu
Jan 10

Fri
Jan 11
unavailable

Mon
Jan 14

Wed
Jan 16
unavailable

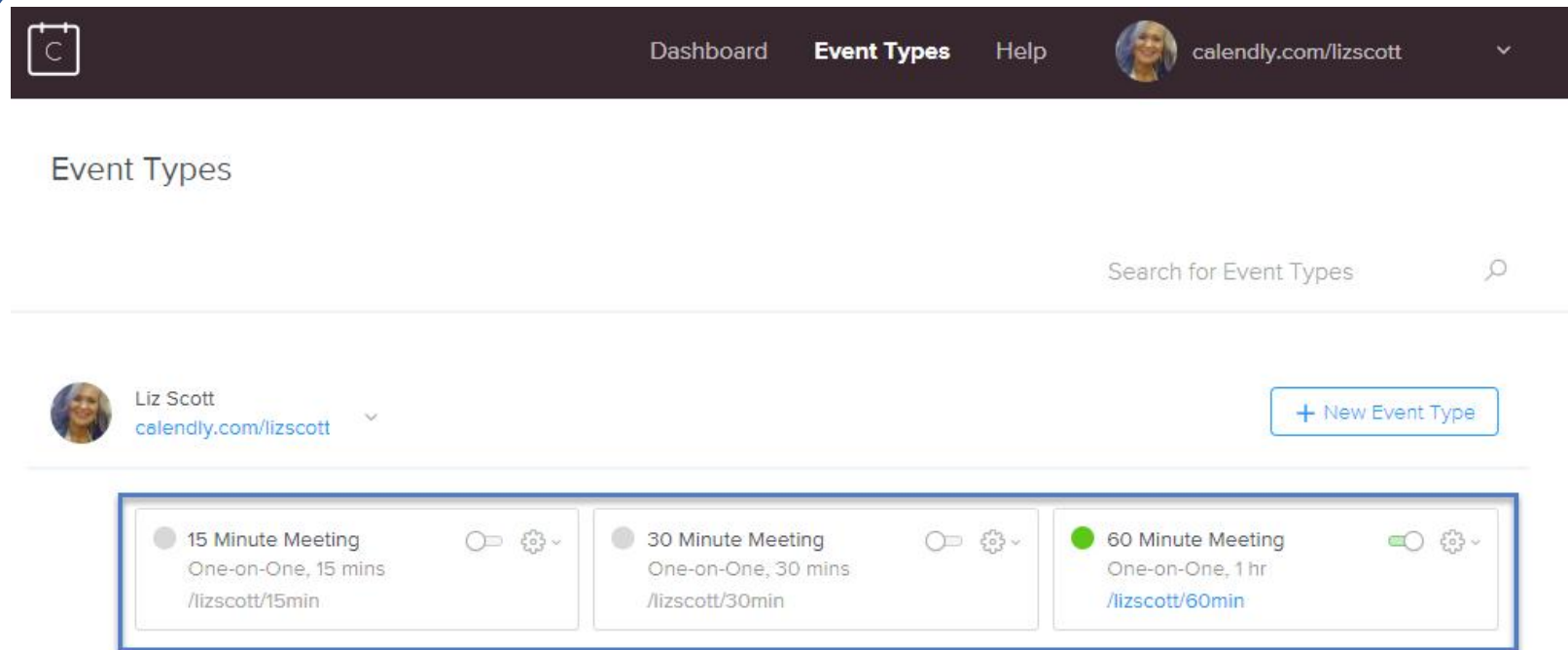
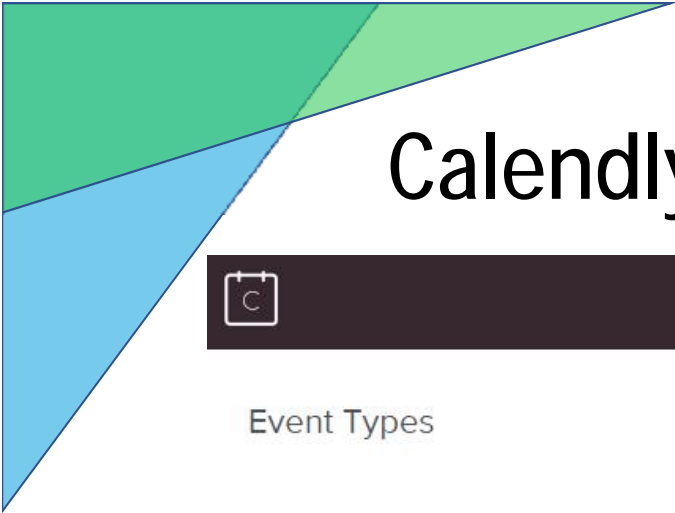
Thu
Jan 17

Fri
Jan 18

THIS WEEK
NEXT WEEK

Before Jan 9
After Jan 18

Calendly Multiple Appointment Types



Calendly interface showing Event Types for Liz Scott.

Navigation: Dashboard, **Event Types**, Help

User: calendly.com/lizscott

Event Types

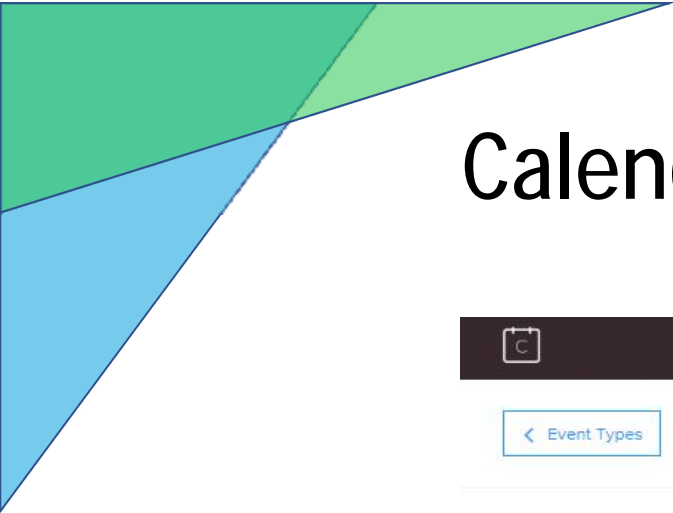
Search for Event Types


Liz Scott
calendly.com/lizscott

+ New Event Type

Event Type	Status	Settings
15 Minute Meeting One-on-One, 15 mins /lizscott/15min	Off	⚙️
30 Minute Meeting One-on-One, 30 mins /lizscott/30min	Off	⚙️
60 Minute Meeting One-on-One, 1 hr /lizscott/60min	On	⚙️

Calendly Booking Preferences



Dashboard **Event Types** Help  calendly.com/lizscott

[< Event Types](#) Edit One-on-One Event Type Your event type is [ON](#)

Invitee language - [English](#) Last edited January 4, 2019. [view live](#)

☒ What event is this?
60 Minute Meeting

☒ When can people book this event?
60 min, 60 rolling days [Cancel](#) [Save & Close](#)


Event Duration * [?](#)

15 min	30 min	45 min	60 min	- custom min
--------	--------	--------	---------------	--------------

Date Range [?](#)

Events can be scheduled over 60 rolling days [Edit](#)

Event Time Zone [?](#)

 You're in Central Time - US & Canada. Your invitees will see your availability in their local time zone. [Edit](#)

Calendly Google Calendar Availability Integrations

Availability ?

Set your available hours when people can schedule meetings with you.

Hours	Advanced	Copy availability from... ▾
Availability Increments		
Set the frequency of available time slots for your invitees.		Show availability in increments of
		30 min ▾
Event Max Per Day		
Use this optional setting to limit the number of events that can be scheduled in a day.		Max number of events per day
		3
Minimum Scheduling Notice		
Use this setting to prevent last minute events.		Prevent events less than
		4 hours away
Event Buffers		
Use this to set aside preparation, rest or travel time before or after events. For example, if you define a 5 minute buffer before your events Calendly will make sure you have 5 minutes of free time before your scheduled events.		Buffer before event
		5 min ▾
		Buffer after event
		5 min ▾

Calendly Meeting Notification

Invite

Hi Liz Scott,

A new event has been scheduled.

Event Type:

60 Minute Meeting

Invitee:

liz test

Invitee Email:

lizbit123@gmail.com

Event Date/Time:

10:00am - Monday, January 14, 2019 (Central Time - US & Canada)

Description:

Need QuickBooks support?

Location:

<https://zoom.us/j/4116951891>

Cancellation

Hi Liz Scott,

The event below has been canceled.

Invitee:

liz test

Invitee Email:

lizbit123@gmail.com

Event Date/Time:

10:00am - Monday, January 14, 2019 (Central Time - US & Canada)

Canceled by:

Liz Scott

Calendly Free Version - Zoom Integration Work Around

Dashboard Event Types Help calendly.com/lizscott

< Event Types Edit One-on-One Event Type Your event type is On

Invitee language - English Last edited January 4, 2018 view live page

What event is this?
60 Minute Meeting

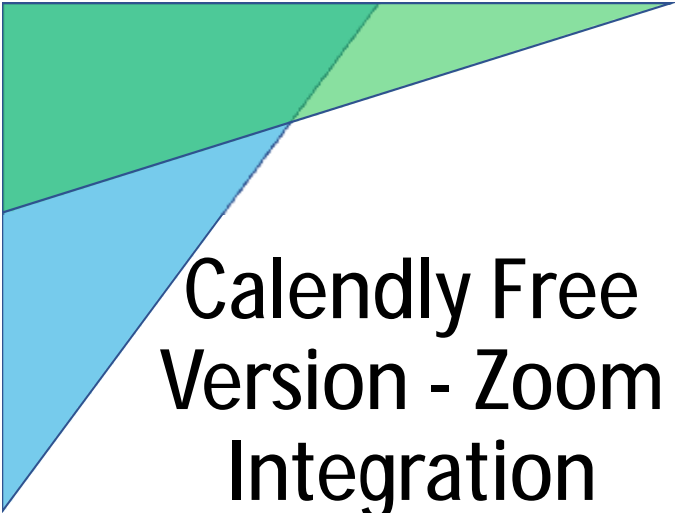
Event name * 60 Minute Meeting

Location ?
https://zoom.us/j/41169518
e.g. Joe's Coffee, I'll call you, GoToMeeting, Zoom, let invitee decide...

☒ Display location while booking
☐ Display location only after confirmation

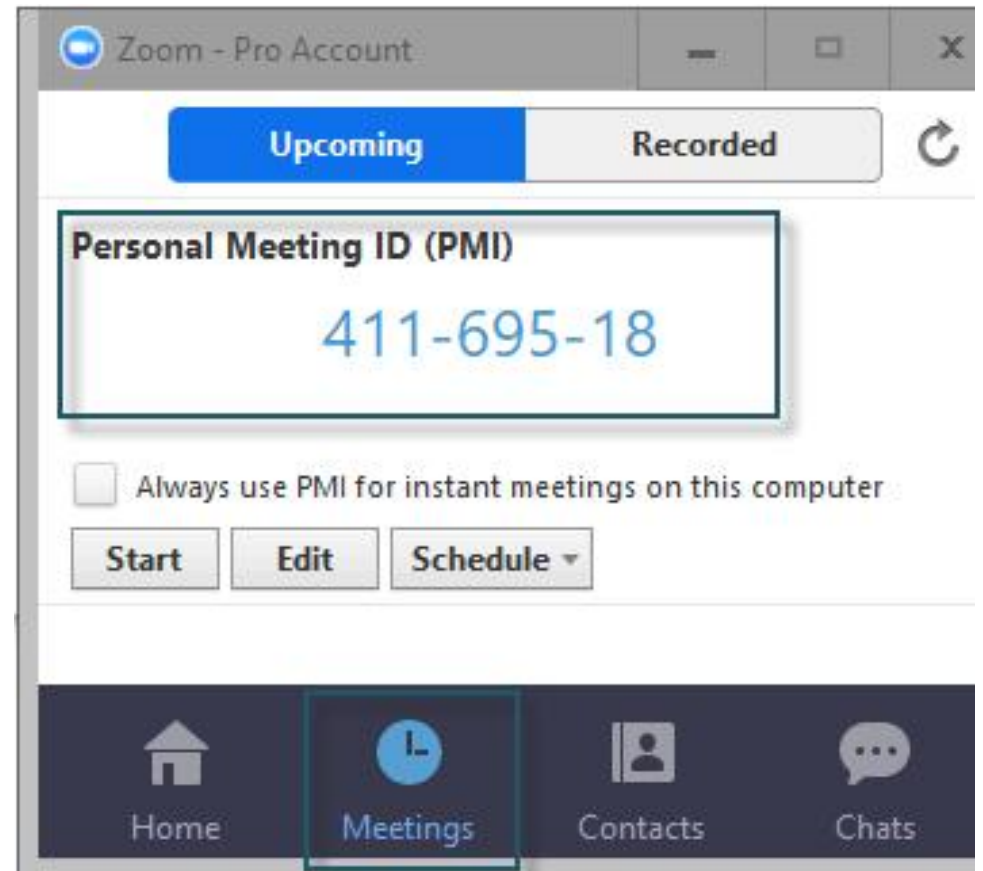
Description/Instructions ?
Need QuickBooks support?

Event link *
calendly.com/lizscott/ 60min



Calendly Free Version - Zoom Integration Work Around

Use PMI for scheduling calendar app meetings



Calendly Paid Version



Never forget your Zoom link again

Let us generate and distribute unique Zoom video conference details for every meeting you schedule. [Connect your Zoom account.](#)



Reduce no-shows and start every meeting on time

Automatically send custom text reminders to all of your invitees so everyone is on time and prepared for your meeting. [Learn how.](#)



Access all of your links in seconds

Copy your links or offer a handful of meeting times in just a few clicks from our Chrome extension. [Install the extension.](#)



Stop chasing payments

Collect payment with PayPal when your clients book so all of the logistics are taken care of before your meeting. [Connect your PayPal.](#)



Measure campaign success and increase conversions

Track and optimize your scheduling page in the same place you analyze the rest of your data, Google Analytics. [Start tracking events.](#)

Google Hangouts Tip

Have you ever been confused or had an attendee be confused by an auto created Google Hangout invite?



Google Hangouts



liz test and Liz Scott

Event Name: 60 Minute Meeting

Need QuickBooks support?

Location: <https://zoom.us/j/41169518>

Need to make changes to this event?

Cancel: <https://calendly.com/cancellations/CFCS7ILJ3ADZ6QZ4>

Reschedule: <https://calendly.com/reschedulings/CFCS7ILJ3ADZ6QZ4>

Powered by Calendly.com

When Mon Jan 14, 2019 10am – 11am Central Time - Chicago

Where <https://zoom.us/j/41169518>

Joining info meet.google.com/kky-urew-wjm

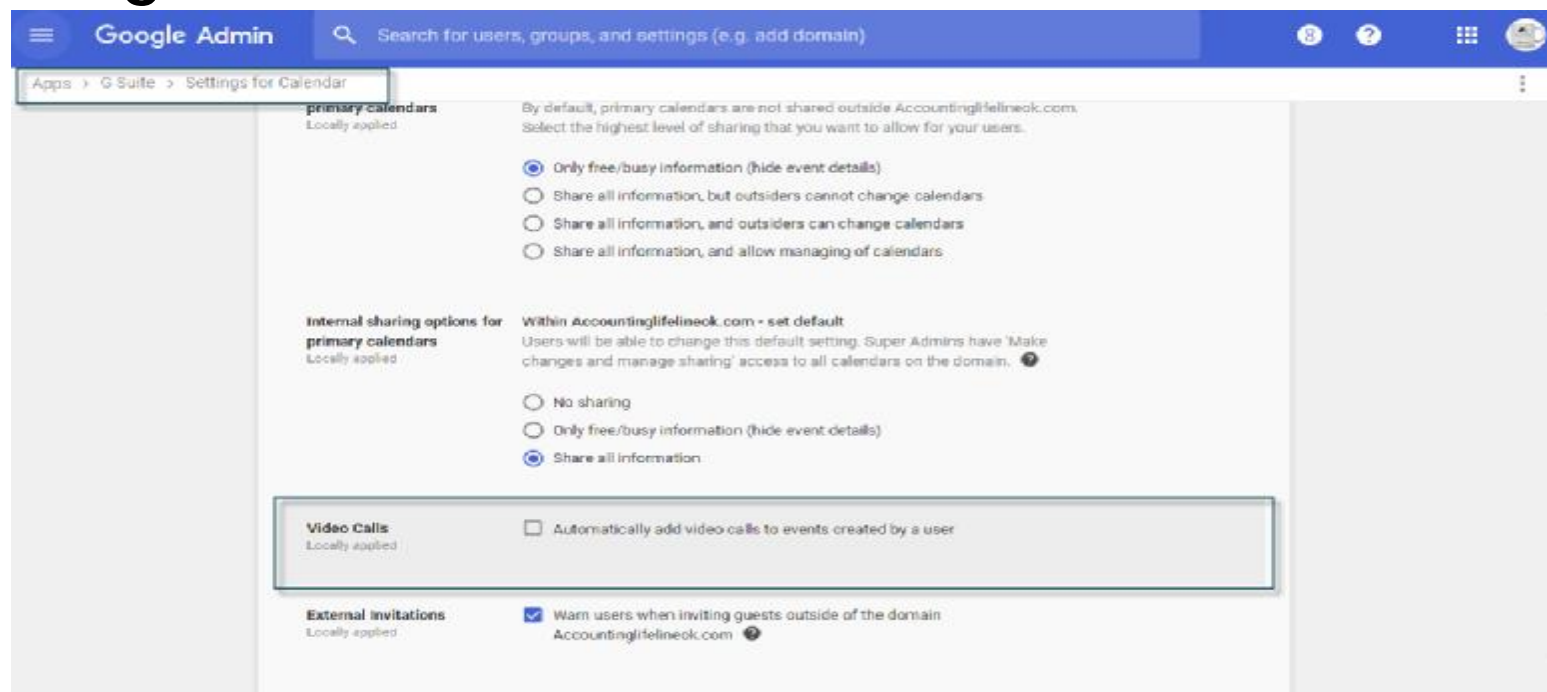
Google Hangouts

Turn off google hangouts so invitees are not confused by two meeting locations

Turn off Google Hangout settings:

1. Sing into the Google Admin console
2. Click Apps > GSuite > Calendar
3. Click Sharing settings
4. Under Video Calls, uncheck Automatically add video calls to events created by users

Google Hangouts



Heather chose Acuity Scheduling

- Paid version \$15/month
- Ability to require payment before booking
- Integration with Zoom, MailChimp, PipeDrive and Zapier!
- Multiple appointment types, including group classes for my workshops
- Intake form questions help me learn about new prospects
- Syncs with multiple Google Calendars
- Embedded form on my website
- Custom links for each type of appointment

Appointment Calendar

The screenshot displays the Acuity Scheduling web interface. On the left is a blue sidebar with navigation links: Appointments, Appointment Calendar (selected), Client List, Reports, Import/Export, Client's Scheduling Page, Business Settings, My Account (HEATHERBATTERLEYCONSULTING...), Log Out, and the Acuity Scheduling logo. The main area shows a calendar for the week of January 6, 2019, with 5 appointments. The calendar is divided into four columns for Sunday, Jan 6; Monday, Jan 7; Tuesday, Jan 8; and Wednesday, Jan 9. The time slots range from 8:00am to 8:00pm. Appointments are represented by colored blocks: green for 'Write Blog Post for Website' and 'Lunch', blue for 'Best Buy with Ken', and grey for 'Rush and Heather to work together'. Some appointments are marked as 'Unavailable'.

Day	Time	Appointment
Sunday, Jan 6	8:00am - 10:00am	Write Blog Post for Website (Google Calendar Syncing) Unavailable Sunday, January 6, 2019 8:00am - 10:00am
Sunday, Jan 6	1:00pm - 3:00pm	Lunch (Google Calendar Syncing) Unavailable Sunday, January 6, 2019 1:00pm - 3:00pm
Monday, Jan 7	8:00am - 10:00am	Write Blog Post for Website (Google Calendar Syncing) Unavailable Monday, January 7, 2019 8:00am - 10:00am
Monday, Jan 7	1:00pm - 3:00pm	Best Buy with Ken (Google Calendar Syncing) Unavailable Monday, January 7, 2019 1:00pm - 3:00pm
Monday, Jan 7	3:00pm - 5:00pm	Rodrigo Fernandez: Initial
Tuesday, Jan 8	8:00am - 12:00pm	Best Buy with Ken (Google Calendar Syncing) Unavailable Tuesday, January 8, 2019 8:00am - 12:00pm
Tuesday, Jan 8	1:00pm - 3:00pm	Lunch (Google Calendar Syncing) Unavailable Tuesday, January 8, 2019 1:00pm - 3:00pm
Tuesday, Jan 8	3:00pm - 5:00pm	Rush and Heather to work together in Portsmouth (Google Calendar Syncing) Unavailable Tuesday, January 8, 2019 3:00pm - 5:00pm
Wednesday, Jan 9	8:00am - 10:00am	Rush and Heather to work together in Portsmouth (Google Calendar Syncing) Unavailable Wednesday, January 9, 2019 8:00am - 10:00am
Wednesday, Jan 9	1:00pm - 3:00pm	MLA Reporting with Wicky (Google Calendar Syncing) Unavailable Wednesday, January 9, 2019 1:00pm - 3:00pm
Wednesday, Jan 9	3:00pm - 5:00pm	Lunch (Google Calendar Syncing) Unavailable Wednesday, January 9, 2019 3:00pm - 5:00pm

Branded Scheduling Page

The screenshot displays the Acuity Scheduling dashboard on the left and a preview of a branded client scheduling page on the right.

Acuity Scheduling Dashboard (Left):

- Calendar:** A monthly calendar view for the month of June, with the 7th highlighted.
- Navigation Menu:**
 - Appointments
 - Client's Scheduling Page
 - Scheduling Page Link** (selected)
 - Customize Appearance
 - Advanced CSS
 - Business Settings
 - My Account (HEATHER SATTERLEY CONSULTING, LLC)
 - Log Out
 - Acuity Scheduling

General Scheduling Page (Middle):

- Section: General Scheduling Page**
 - Text: "Your Client's Scheduling Page shows all public appointments."
 - Link: <https://satterleyconsulting.com/scheduling>
 - Buttons: Copy, Change Link Name
- Section: Direct Links & Embedding**
 - Text: "You can send direct links to your general client's scheduling page or embed the scheduling page on your website."
 - Text: "Select your General Scheduling Page"
 - Option: General Scheduling Page
 - Buttons: Direct Link, Embed Scheduling Page
 - Text: "This is a direct link for clients to view your scheduling page. [Learn more about direct links.](#)"
 - Link: <https://satterleyconsulting.com/scheduling>

Preview of your Client's Scheduling Page (Right):

- Buttons:** Close Preview, View Live
- Header:**
 - Logo: Satterley Training & Consulting
 - Text: Premier Training for Accounting Professionals
- Form:**
 - Choose Appointment: Your Info, Confirmation
 - Redeem Coupon
 - Choose a category...
 - Initial Meeting
 - Training Session
 - Returning? [Log In](#)
 - (GMT-5:00) Eastern Time [Change](#)
 - Powered by Acuity Scheduling

Embedded Scheduling Page

Satterley
Training & Consulting

SERVICES ABOUT BLOG **CONTACT** COURSES

f t in

Schedule An Appointment

Choose Appointment Your Info Confirmation

Returning? [Log in](#)

[Redeem Coupon](#)

Choose a category...

Initial Meeting

Training Session

(GMT-5:00) Eastern Time (change)

Powered by [Acuity Scheduling](#)

HEATHER D. SATTERLEY
As an accountant, technology expert and

CONTACT ME
info@satterleyconsulting.com

OTHER LINKS
Classes and Webinars

 @qbappyhour

Unlimited Appointment Types and Categories

Appointment Types

Types Add-ons Coupons

[New Type of Service](#) [New Type of Group Class](#) [Preview](#)

Categories are sorted alphabetically. Click and drag appointment types to reorder or move them to a new category. [Learn more >](#)

Consulting/Coaching [Direct Scheduling Link](#)

Consultation - up to 120 minutes (2 hours, no price set with 30 minutes padding after and 30 minutes padding before)	Schedule	Edit	Duplicate	Direct Scheduling Link
Consultation - up to 15 minutes (via Zoom) (15 minutes @ \$75.00 with 15 minutes padding after and 10 minutes padding before)	Schedule	Edit	Duplicate	Direct Scheduling Link
Consultation - up to 30 minutes (via Zoom) (30 minutes @ \$100.00 with 15 minutes padding after and 10 minutes padding before)	Schedule	Edit	Duplicate	Direct Scheduling Link
Consultation - up to 60 minutes (via Zoom) (1 hour @ \$175.00 with 15 minutes padding after and 10 minutes padding before)	Schedule	Edit	Duplicate	Direct Scheduling Link

Initial Meeting [Direct Scheduling Link](#)

Initial Meeting via Zoom (15 minutes, no price set with 10 minutes padding after and 5 minutes padding before)	Edit	Duplicate	Direct Scheduling Link
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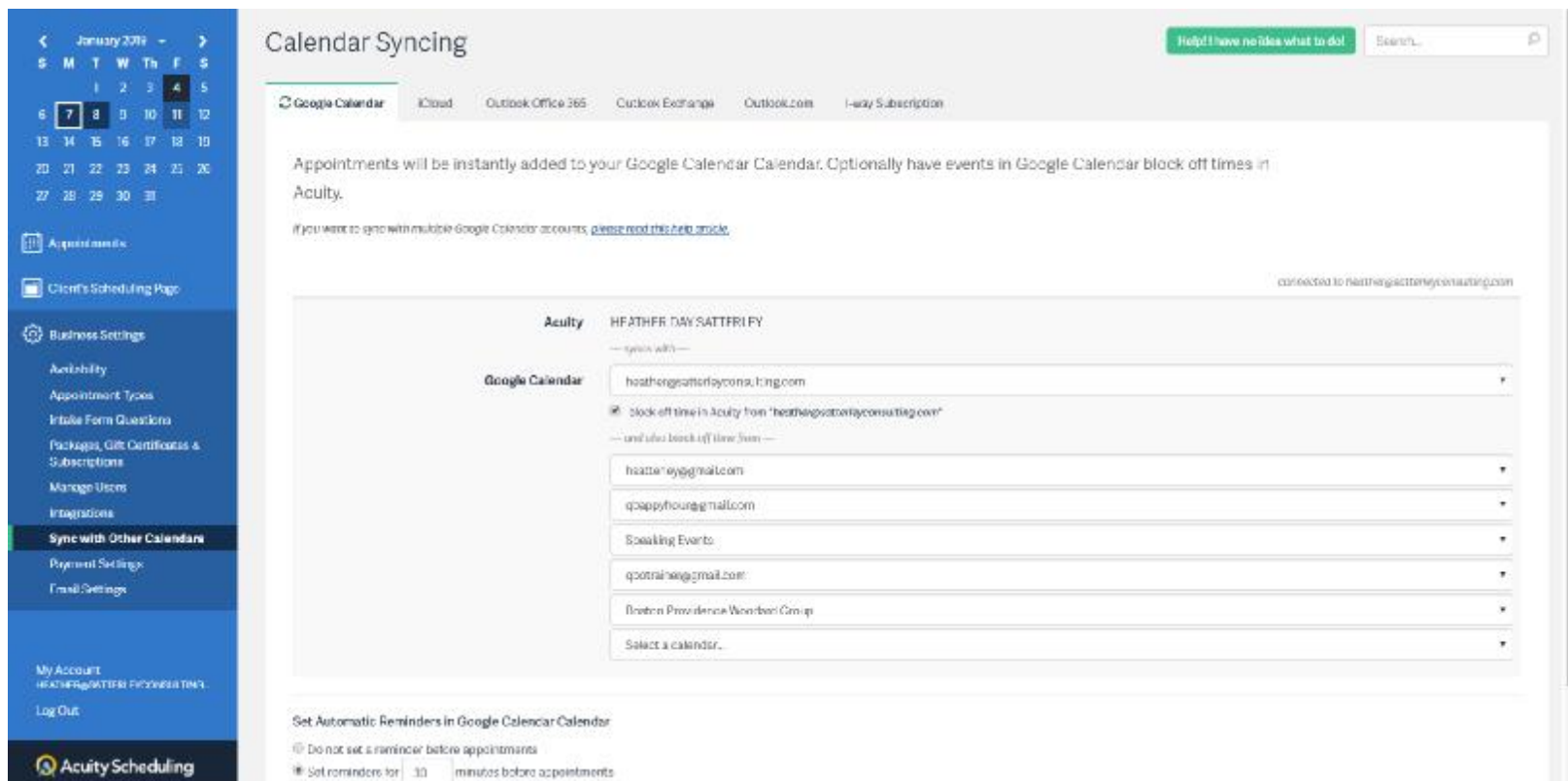
Secret [Direct Scheduling Link](#)

Meeting (30 minutes, no price set)	Schedule	Edit	Duplicate	Direct Scheduling Link
Lunch meeting (1 hour 30 minutes, no price set with 15 minutes padding after and 15 minutes padding before)	Schedule	Edit	Duplicate	Direct Scheduling Link



 @qbappyhour

Sync with Multiple Calendars



Calendar Syncing

Help! I have no idea what to do! Search...

Google Calendar iCloud Outlook Office 365 Outlook Exchange Outlook.com I-way Subscription

Appointments will be instantly added to your Google Calendar Calendar. Optionally have events in Google Calendar block off times in Acuity.

If you want to sync with multiple Google Calendar accounts, [please read this help article](#).

connected to heather@acuityscheduling.com

Acuity HEATHER DAY SATTERLY

— sync with —

Google Calendar heather@satterlyconsulting.com

☒ block off time in Acuity from "heather@satterlyconsulting.com"

— and also block off time from —

heather@qgmail.com

qbappyhour@gmail.com

Soaking Events

qbtraining@gmail.com

Boston Providence Women's Group

Select a calendar...

Set Automatic Reminders in Google Calendar Calendar

☐ Do not set a reminder before appointments

☒ Set reminders for 30 minutes before appointments

Customized Email Notifications

Email Settings

Initial Confirmation Reminders Cancellation Rescheduling Follow-up Package/Gift Certificate Order

An Initial Confirmation email is sent to you and your clients immediately after an appointment is scheduled.

Initial Confirmation Email Templates You have 7 active templates

[Add New Template](#)

Initial Confirmation

- Consulting/Coaching: Consultation - up to 30 minutes (via Zoom)
- Consulting/Coaching: Consultation - up to 60 minutes (via Zoom)
- Training Session: Training Session (via Zoom) - up to 2 hours \$350
- Services: GBDT to QBO Conversion Support
- Services: App Integration Support \$200
- Training Session: Training Session (via Zoom) - up to 1 hour \$200
- Consulting/Coaching: Consultation - up to 75 minutes (via Zoom)

EMAIL SUBJECT

New Appointment: %type% (%first% %last%) on %calendar%

EXAMPLE: New Appointment: Consultation - up to 30 minutes (via Zoom) (Kelly Hollis) on June 1, 2017 2:15pm with HEATHER DAY SATTERLEY

Appointment Scheduled

for %first% %last%

What: %type% (%calendar%)

When: %time% (%duration%)

Tons of Integrations!!!!!!!

The screenshot displays a comprehensive list of integrations available on the QB Appy Hour platform. The integrations are organized into several categories, each with a header and a grid of service cards. Each card typically includes the service logo, a brief description of the integration, and a 'Get It' button.

- Client Engagement:** Includes integrations like ReferralCandy, Eventbrite, and others for managing client relationships.
- Video Conferencing:** Features Zoom, GoToMeeting, and others for virtual meetings.
- App:** Includes Zapier for automation and various mobile app integrations.
- Stripe:** Lists payment gateway integrations like Stripe, Braintree, and PayPal.
- Web Builders:** Includes website creation tools like Wix, Squarespace, and others.
- Other Categories:** Includes social media, email marketing, and various business tool integrations.

What do you use?



Making More Money

Consider adding Strategic Advisory Services!

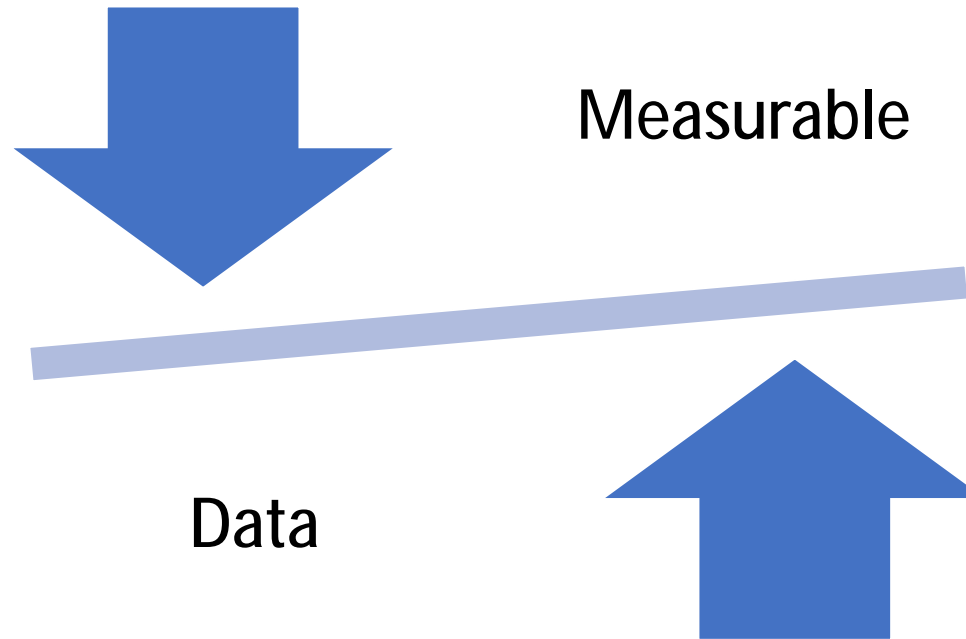
Strategic
Advisor

Create
Goals

Guided
Plan

Strategies
to obtain

KPI – Key Performance Indicators





Let's Raise a Toast
to....LivePlan!

STRATEGIC ADVISING

with  LivePlan



KATHY GREGORY

**Director of Strategic
Development and Engagement,**
Palo Alto Software



 LivePlan

 @qbappyhour

The LivePlan Resolution

- 1 bottle chilled Champagne
- 1 cup fruit juice (any kind will do) frozen in an ice cube tray
- Add frozen fruit cubes to a class and fill with champagne

www.qbappyhour.com

THE LIVEPLAN METHOD

A LIVING PLAN



LIVEPLAN METHOD

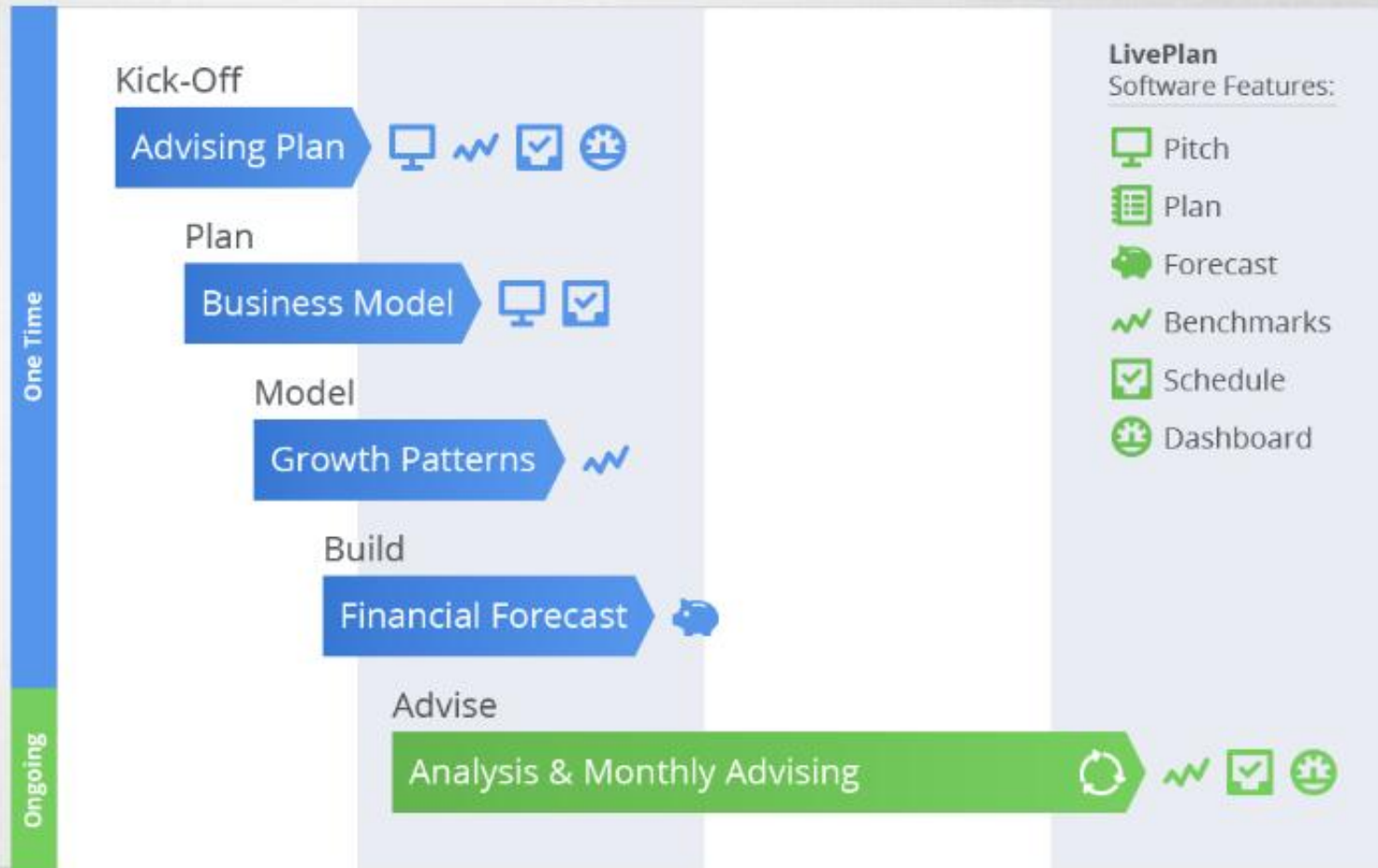


LIVEPLAN BEST PRACTICE

Make a system



The LivePlan Method in Practice



LIVEPLAN METHOD - #1 Kick Off

DEFINE OFFERING

SET EXPECTATIONS

HOOK!



LIVEPLAN METHOD - #2 Plan

LEAN PLAN

WHAT DO THEY
SELL?

HOW DO THEY
SELL IT?



LIVEPLAN METHOD - #3 Model

ANALYZE
HISTORICALS
GROWTH PATTERNS /
RATIOS
FORECASTING
CATEGORIES



LIVEPLAN METHOD - #4 Build

BUSINESS
ROADMAP

FULL FINANCIAL
FORECAST



LIVEPLAN METHOD - #5 Advise

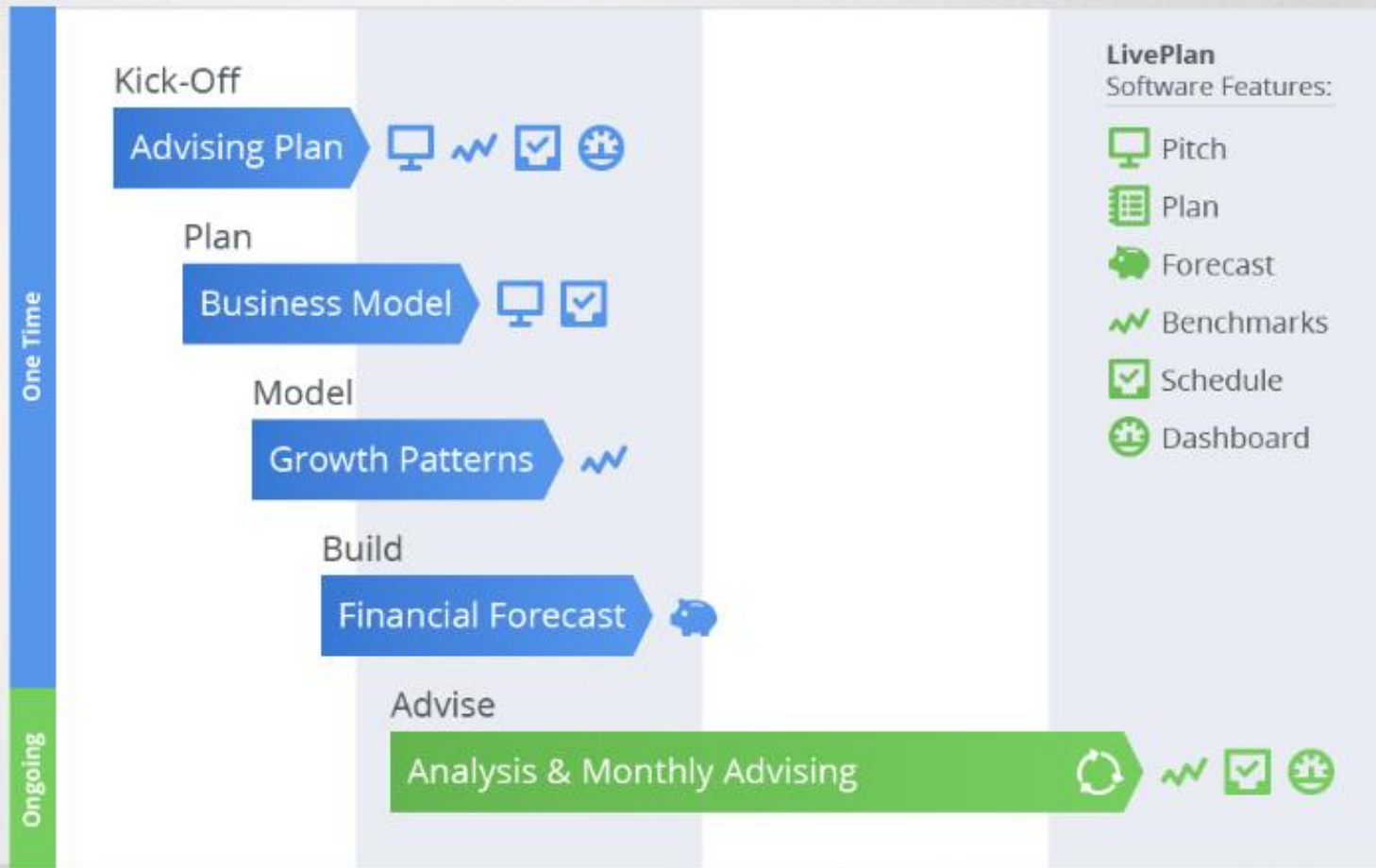
CYCLICAL MEETING
BUSINESS DECISIONS
ADJUSTMENTS



THE LIVEPLAN METHOD



The LivePlan Method in Practice



THE LIVEPLAN METHOD

A LIVING PLAN



LIVEPLAN METHODOLOGY

KICK-OFF

HOOK THE CLIENT

ESTABLISH STRUCTURE



LIVEPLAN METHODOLOGY

OVERVIEW

KICK OFF → HOOK THE CLIENT!

1. Show framework of advisory relationship and what the output will look like
2. Review current status using actuals and industry benchmarks
3. Talk to your client about their goals
4. Determine their need and understand their unique business solution
5. Establish your go forward plan for advising: meeting schedule, price, goals

END RESULT = AN ADVISING PLAN WITH MILESTONES

LIVEPLAN IN PRACTICE

PROCEDURE

2.25 hours

KICK-OFF → LIVEPLAN SCOREBOARD, BENCHMARKS, PITCH

1. Set up Company options: assign users, set plan timeframe
2. Connect client QBO file to LivePlan Company - prelim mapping
3. Set up Benchmarks with appropriate variables
4. Enter basic company info in Pitch: Name, Logo, team members if known
5. Prepare & hold planning meeting (discovery - step by step examples)

WORK PRODUCT = ADVISING PLAN W/ MILESTONES

The LivePlan Method for client advisory services

9 Steps / About 5 hours remaining

Learn about The LivePlan Method for standardized, monthly advisory services: a business process, software, and resources, to guide your client engagement

RESUME 1 OF 9

<https://strategicadvisors-paslearning.bridgeapp.com/learner/programs/41>

**EPIC APP
FAIL!**

**liz and Heather's Coolest
thing we've done with an
app this month**

Remember Postable?

Dear Alison,
May your holidays be bright and
your New Year be prosperous! Thank
you for being part of my life and
community :)

Warmest wishes,
Heather Satterley

< CARD INFO

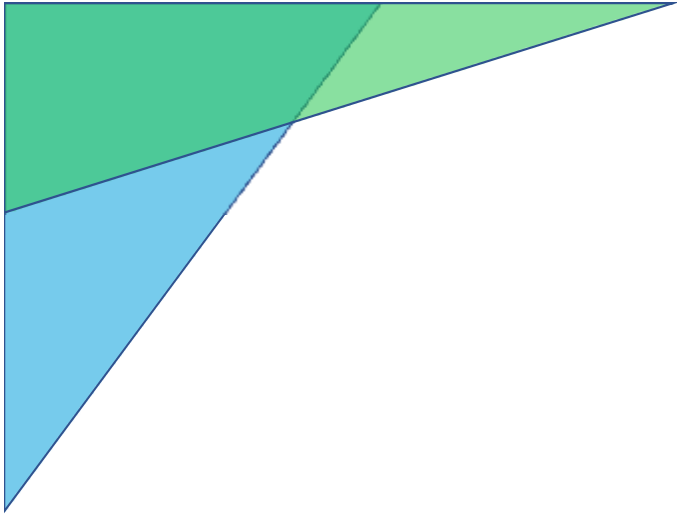
Recipient

Alison Ball

Intuit

Mailed on Dec 23, 2018





 @qbappyhour

www.qbappyhour.com

Postable refunded my entire order and offered to send new cards to the affected recipients

So while it was an **EPIC APP FAIL**, they win for GREAT customer service!



Visit our website www.qbappyhour.com

- View recorded episodes
- Learn about our sponsors and get drink recipes from our Bar Book
- Read our blog
- Send us a message

Thank you! Don't forget to

- Visit our sponsor website!
- Like us on Facebook – <https://www.facebook.com>
- Follow us on Twitter - @qbappyhour
- Join The QB 'Appy Hour Lounge Facebook Group
<https://facebook.com/groups/qbapphour/>
- Register for the monthly webinar on Zoom
- Thank you for spending an hour getting 'appy with us!

Join us next month!

- Feb 12th at 4:00 PM EST
- Knowify Using Projects for QBO