The QB 'APPY HOUR with Liz & Heather

www.qbappyhour.com

Take charge of your practice in the New Year!

January 2019

Brought to you by:

LivePlan

Your Hosts

Liz Scott
Accounting Lifeline

Heather Satterley
Satterley Training & Consulting

Thank you to this month's sponsor!

The QB 'APPY HOUR with Liz & Heather

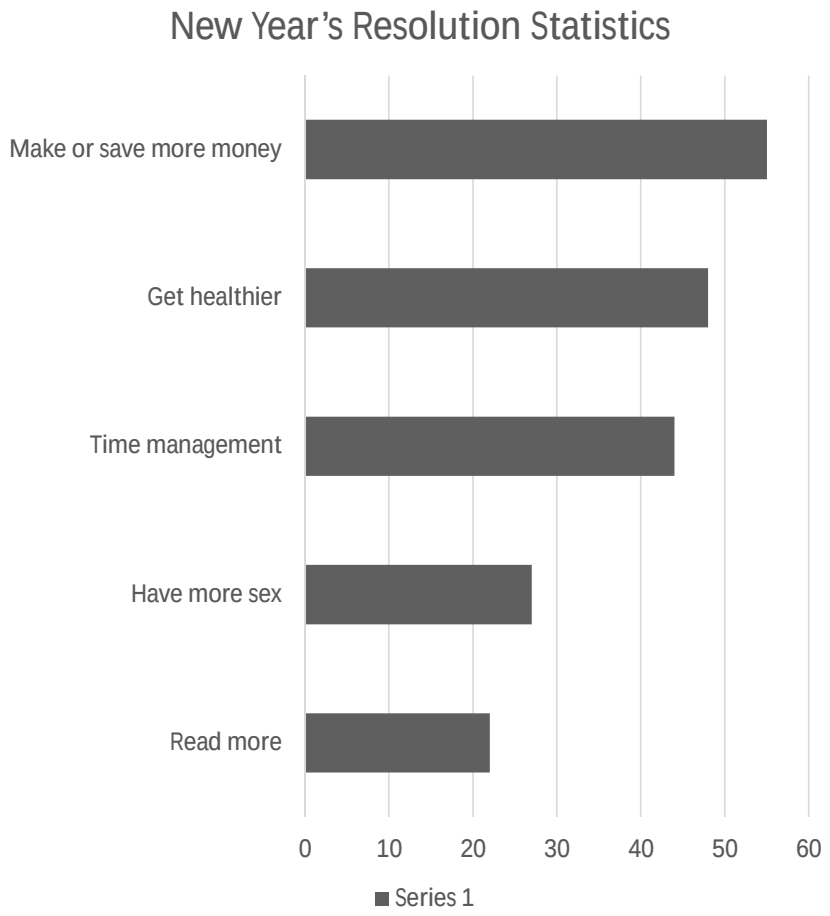
Agenda

- 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
Make or save more money
Get healthier
Time management
Have more sex
Read more
0
10
20
30
40
50
60
Series 1

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

The QB 'APPY HOUR with Liz & Heather

*Included in paid version only

	calendly	
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

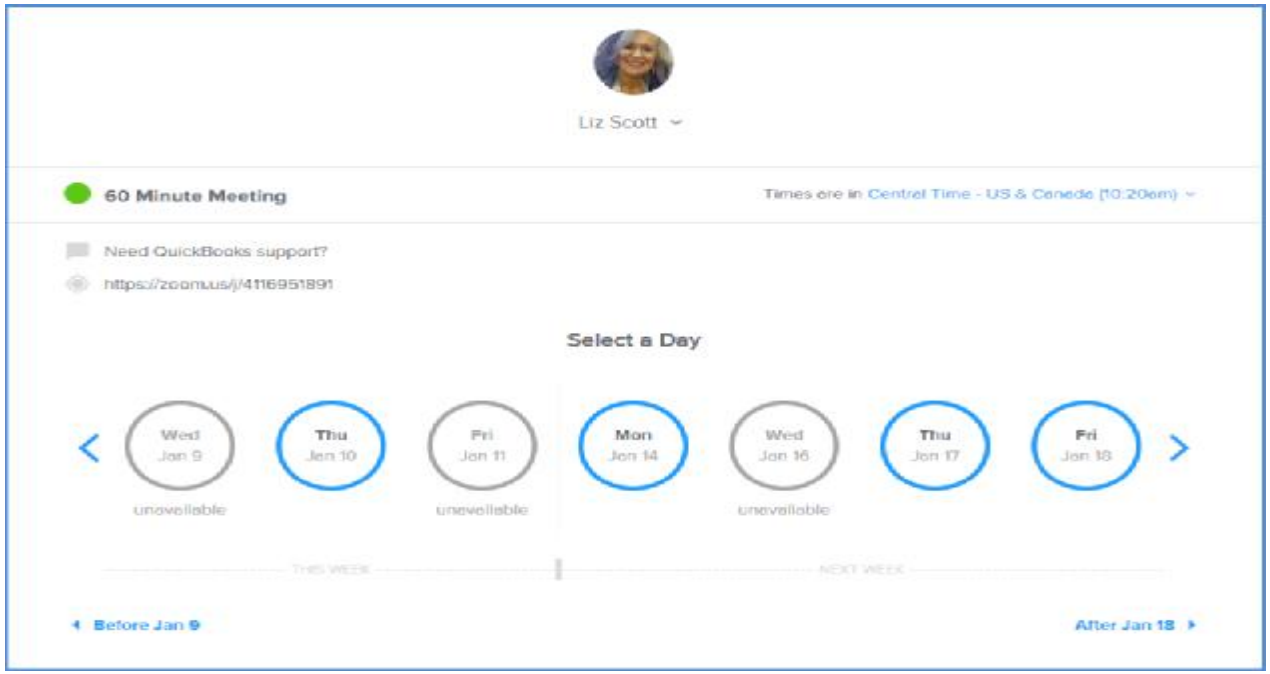
Free Version had all the features I needed:

- 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

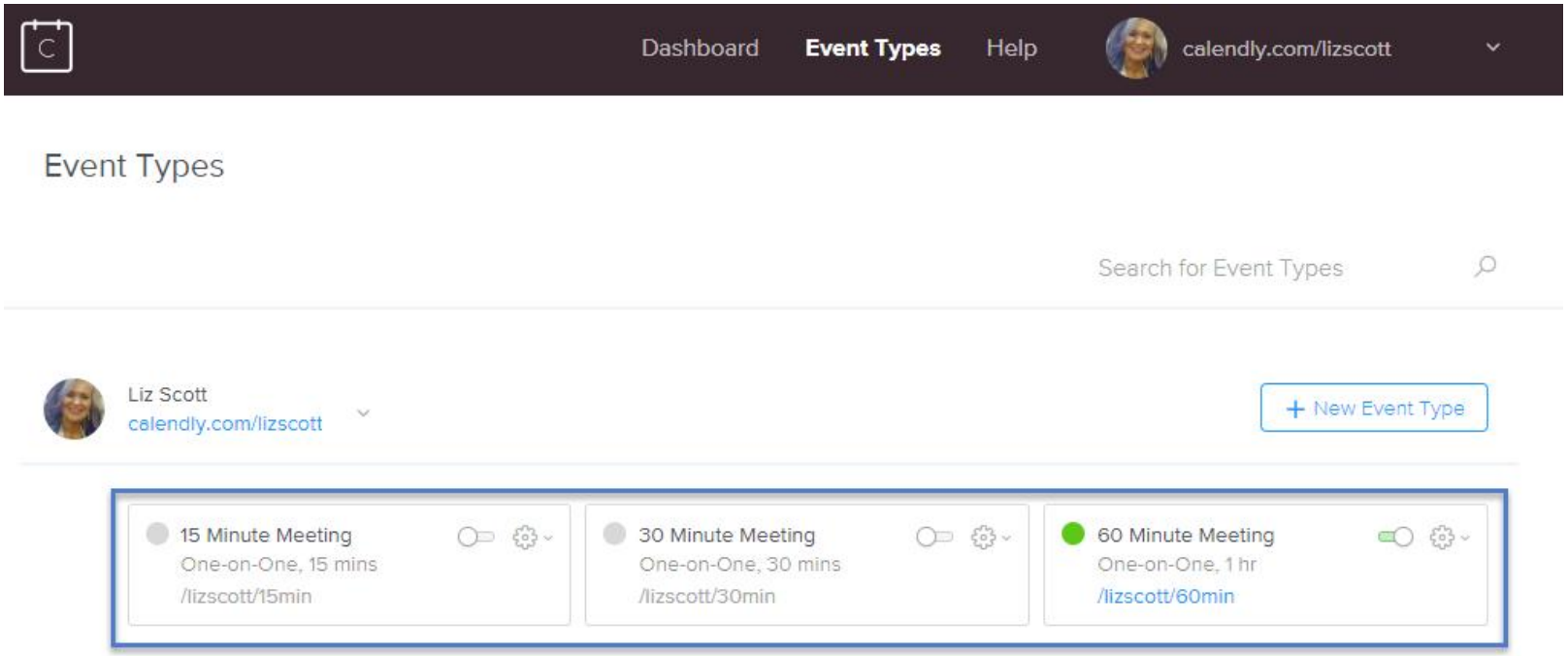
Calendly Booking an Appointment

Liz Scott
Accounting Lifeline
Intuit Trainer Writer Network
Contributing Author for Insightful Accountant

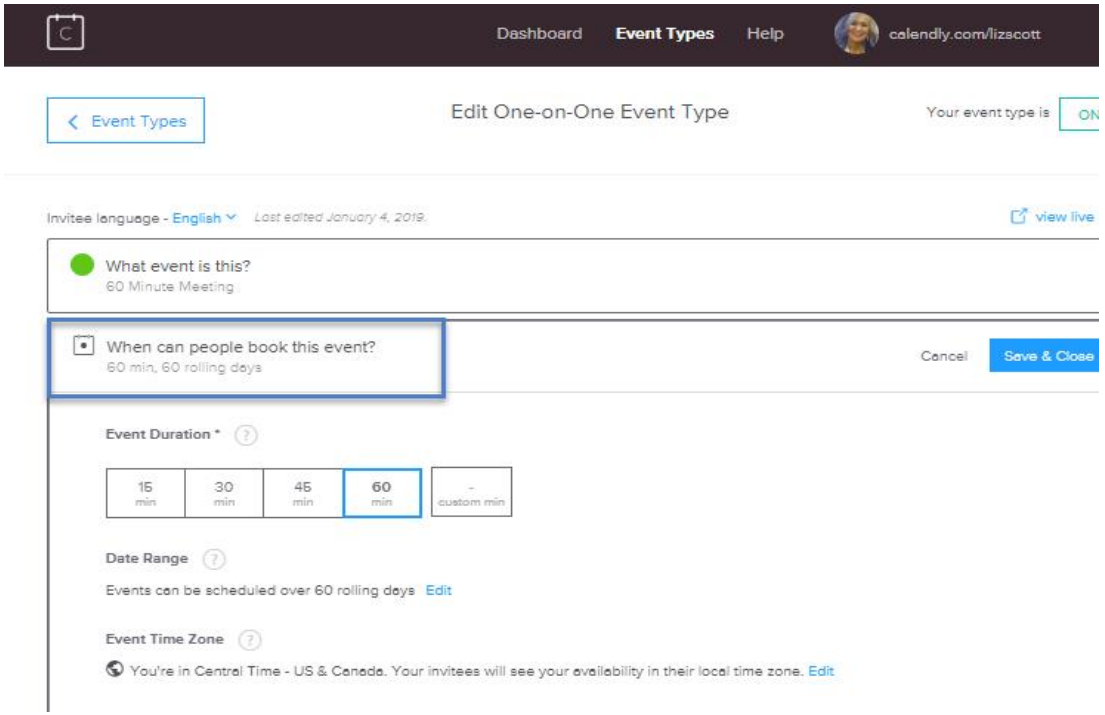
www.AccountingLifelineOK.com
Click here to securely share a file.
Click here to schedule a meeting.



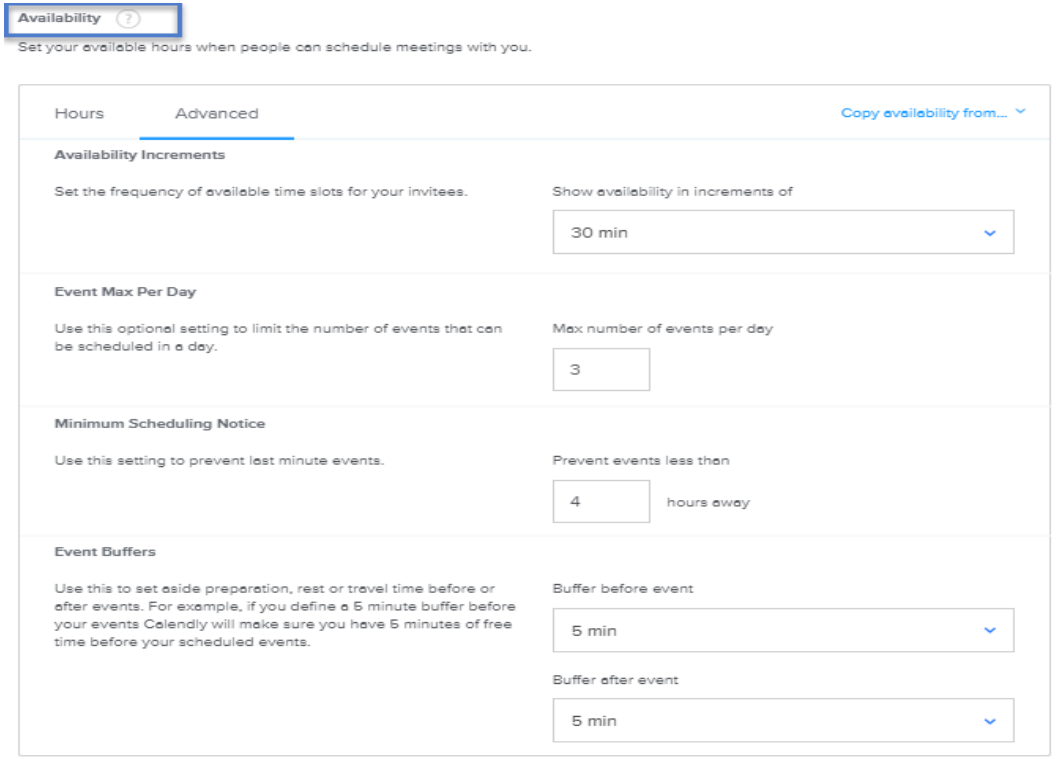
Calendly Multiple Appointment Types



Calendly Booking Preferences



Calendly Google Calendar Availability Integrations



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.

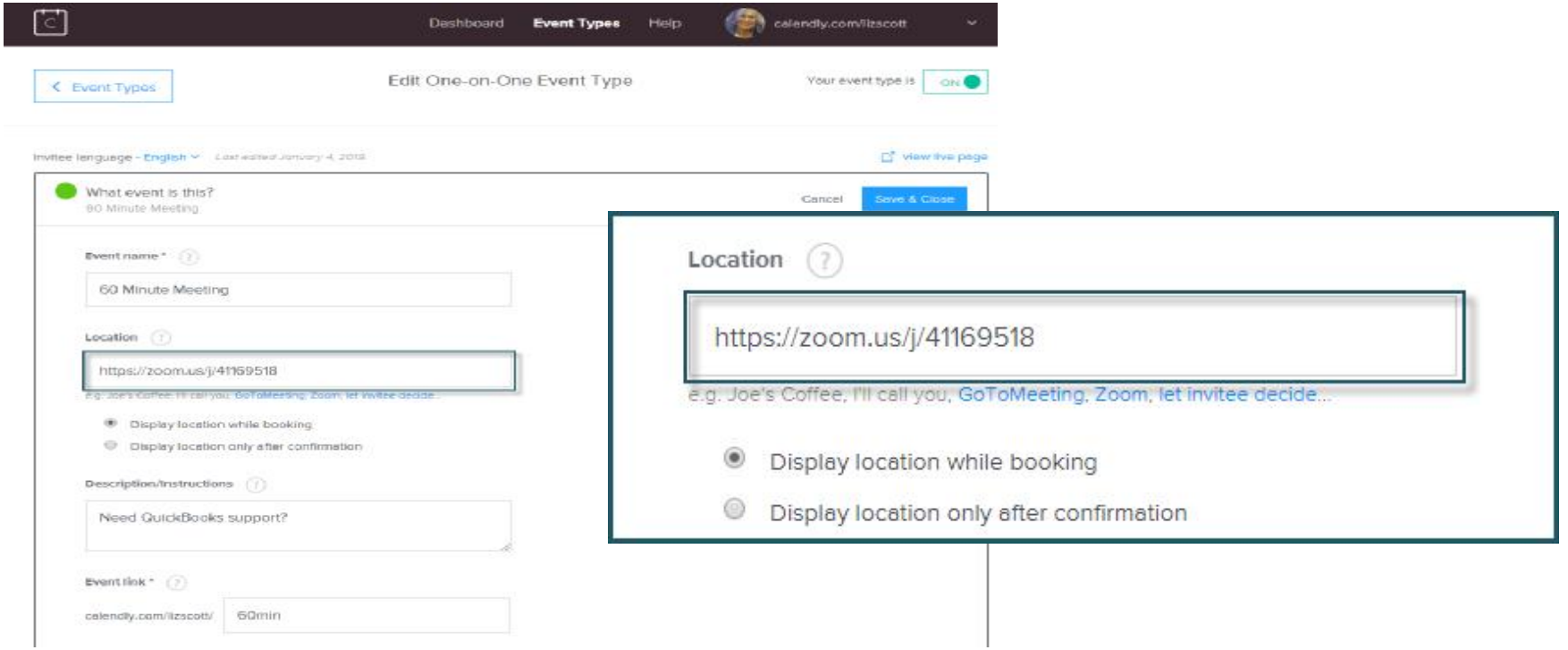
Invitee:
liz test

Invitee Email:
lizbit123@gmail.com

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

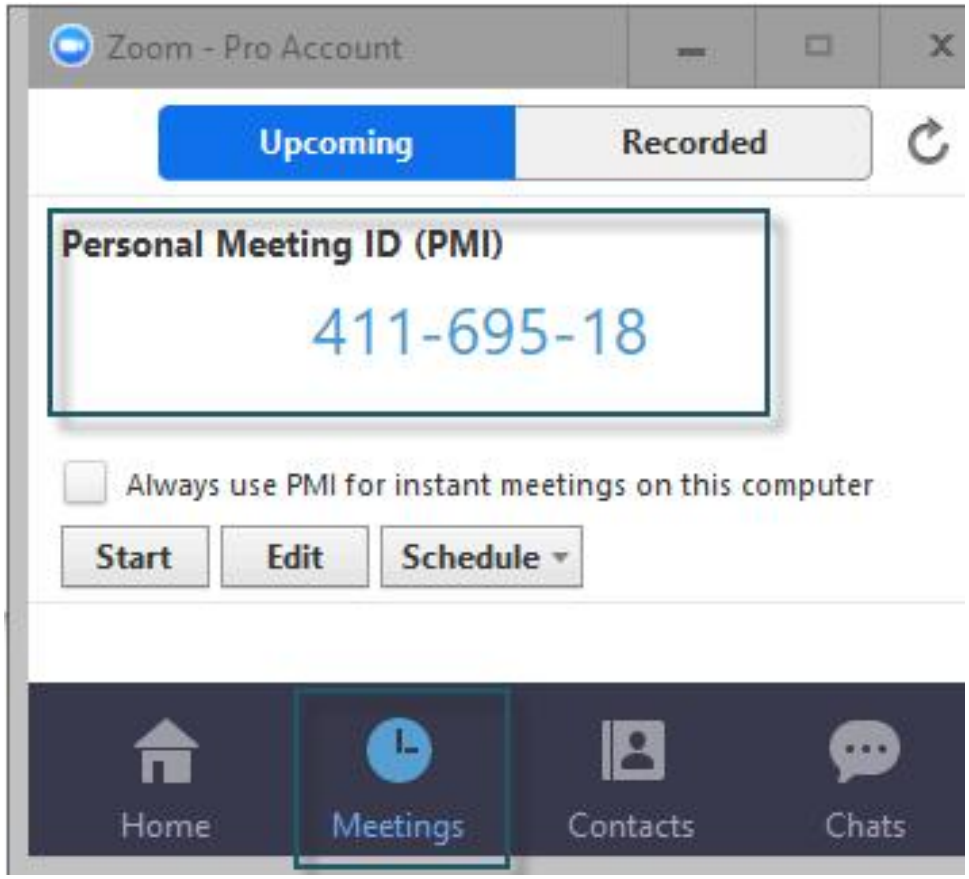
Canceled by:
Liz Scott

Calendly Free Version - Zoom Integration Work Around



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

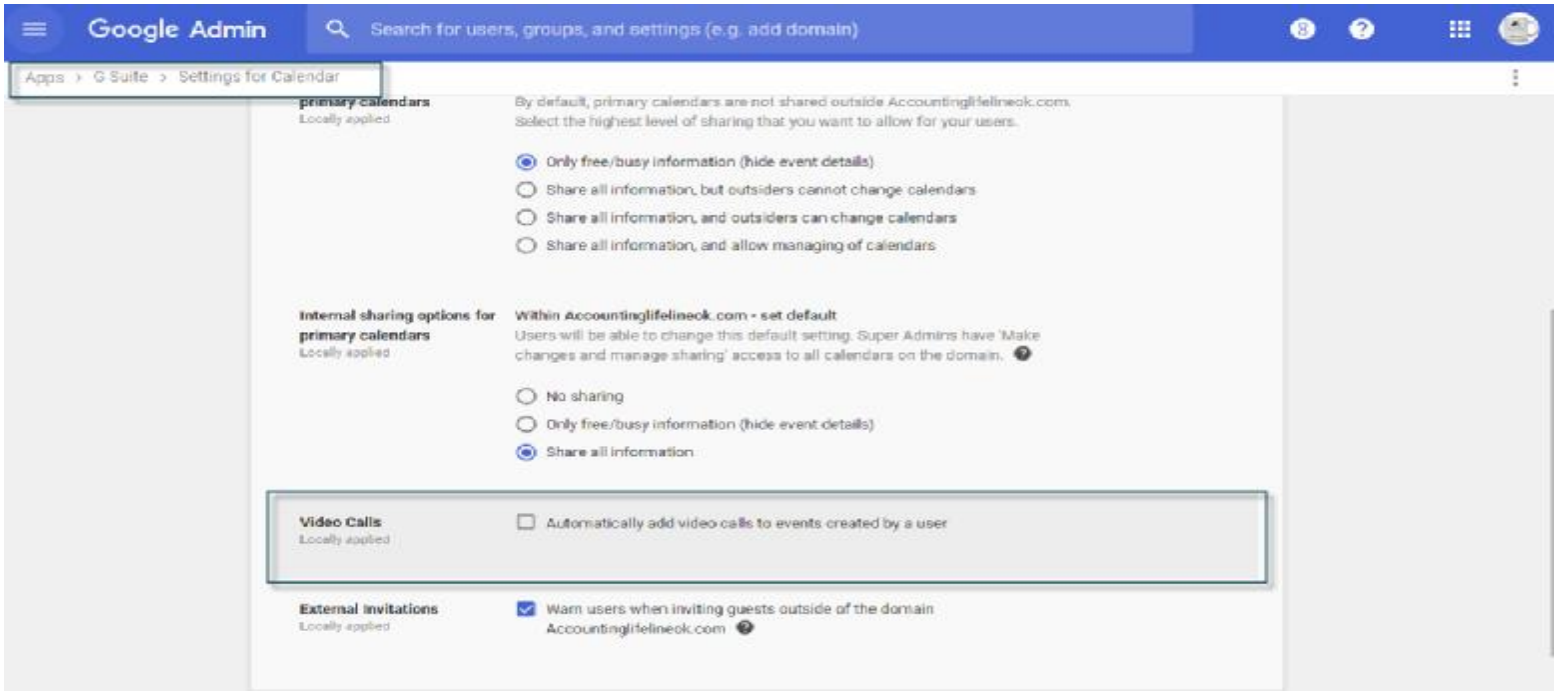
Google Hangouts

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

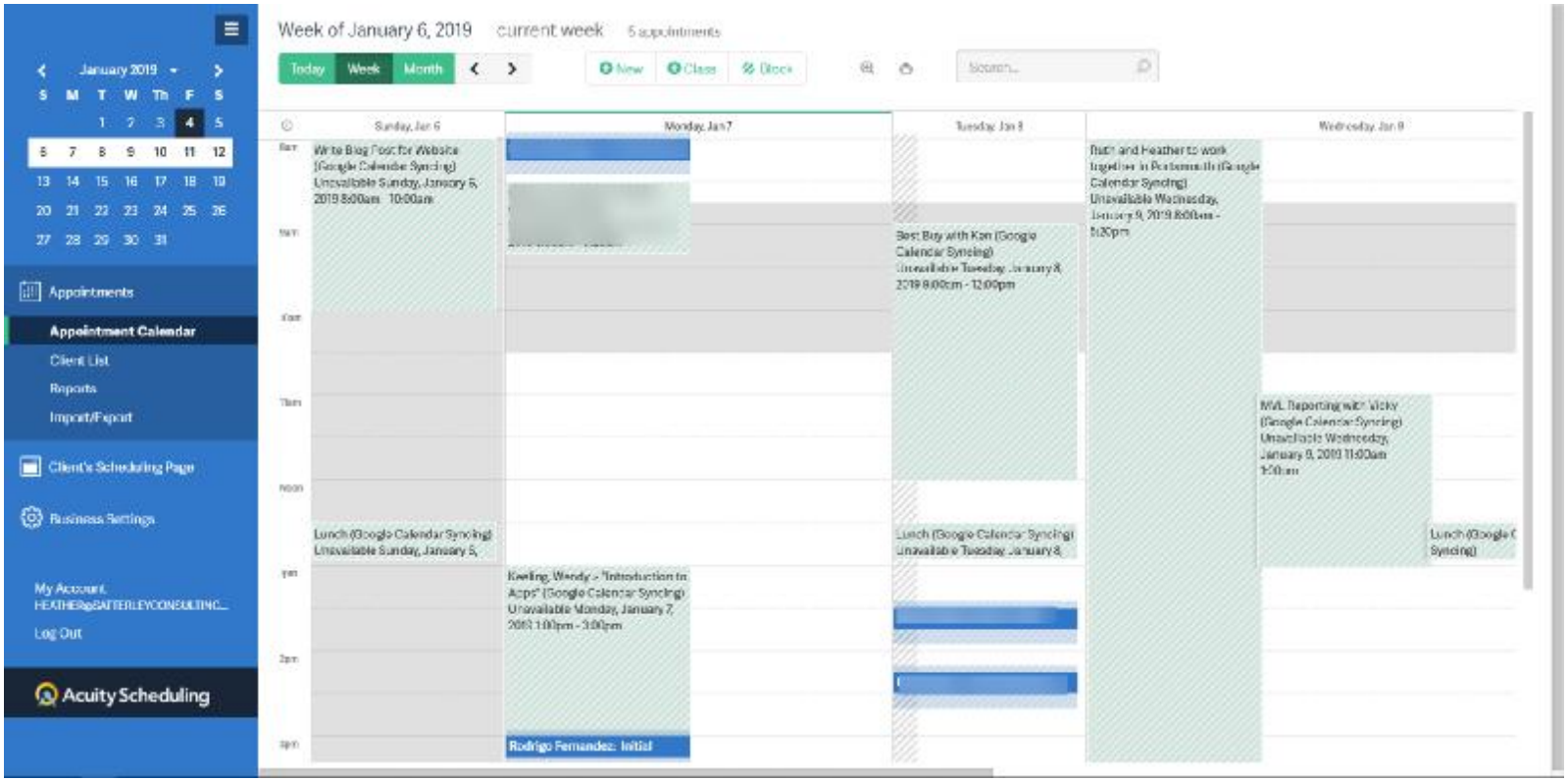
Google Hangouts



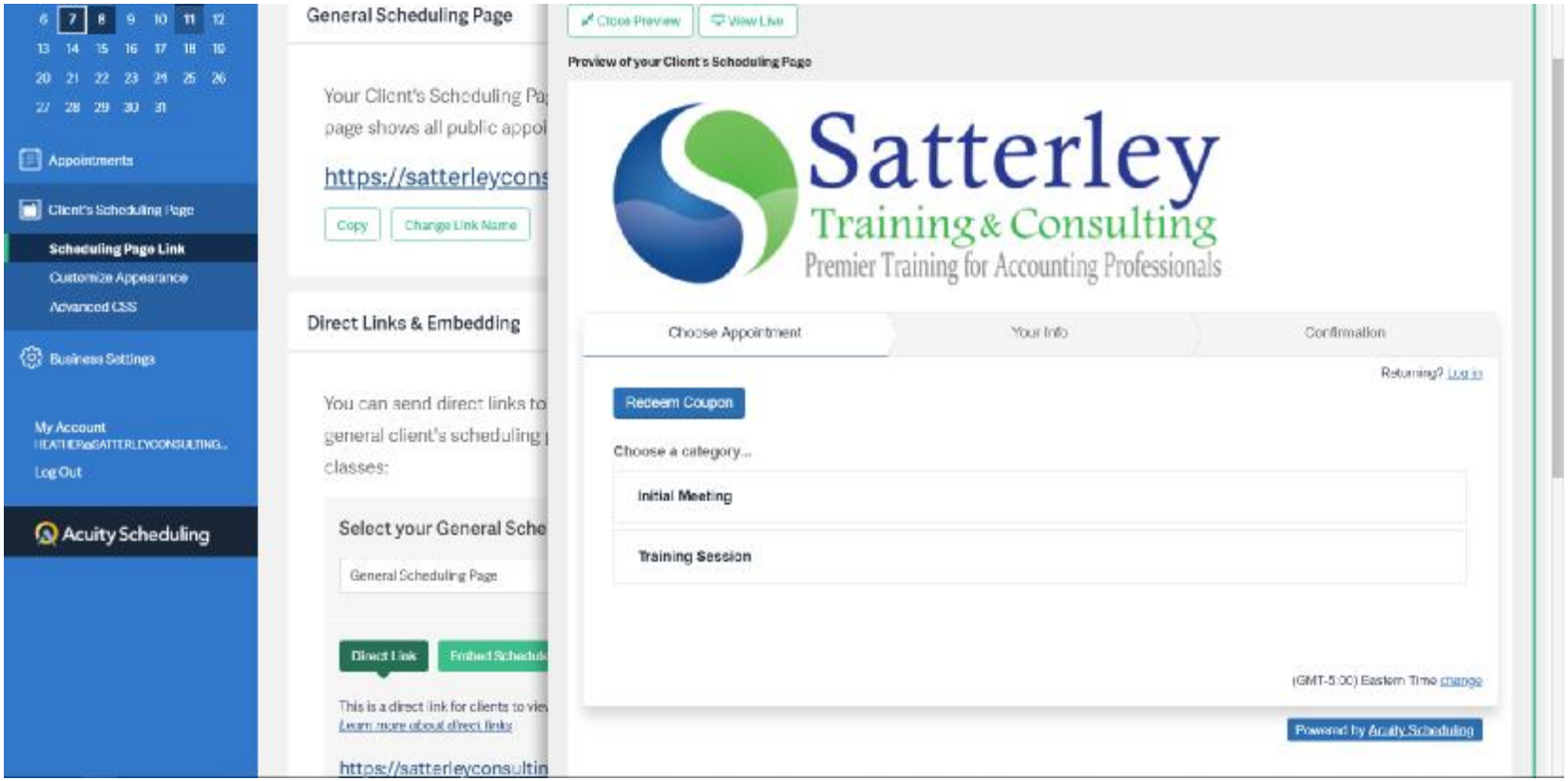
Heather chose Acuity Scheduling

- 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

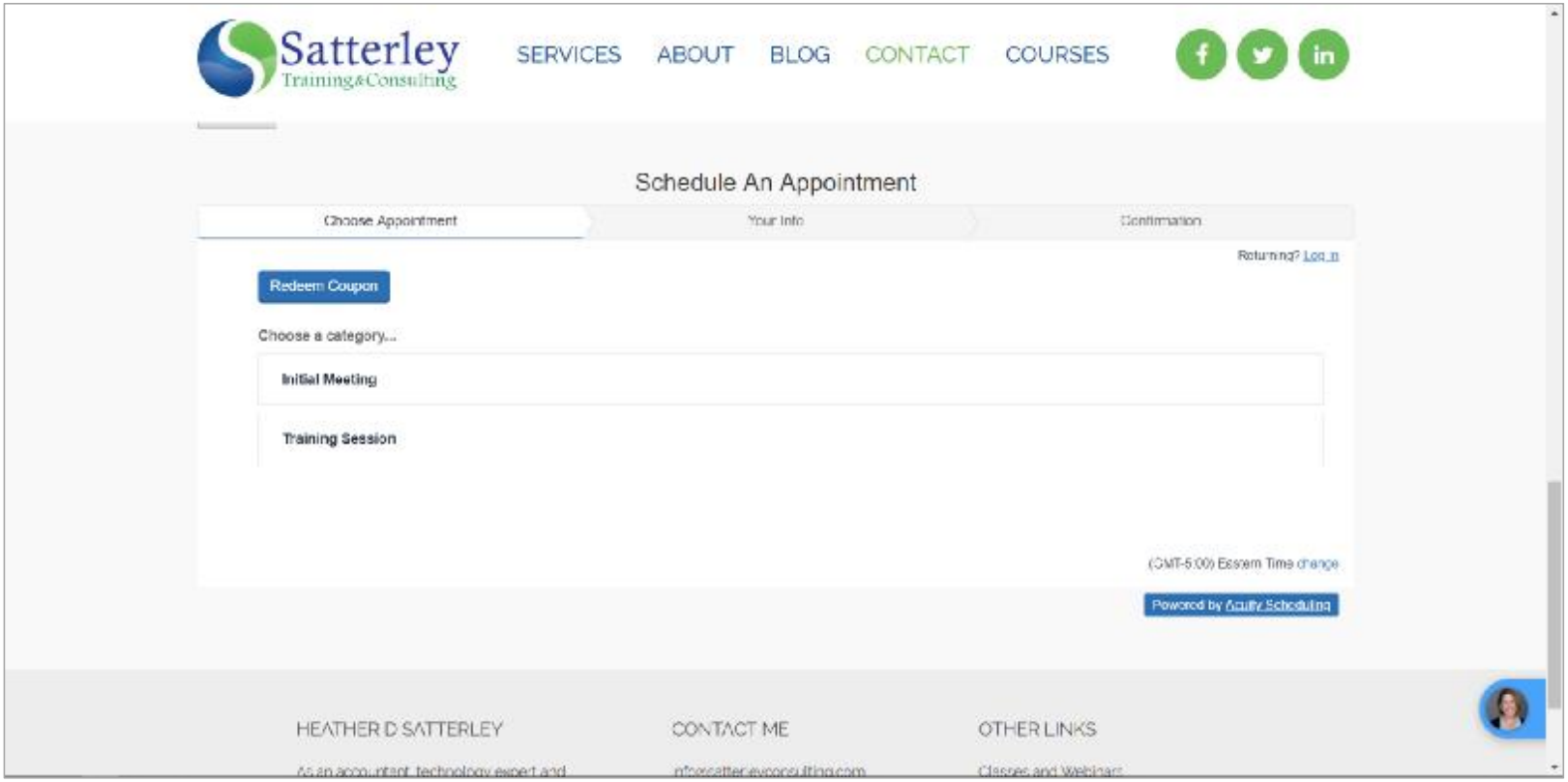
Appointment Calendar



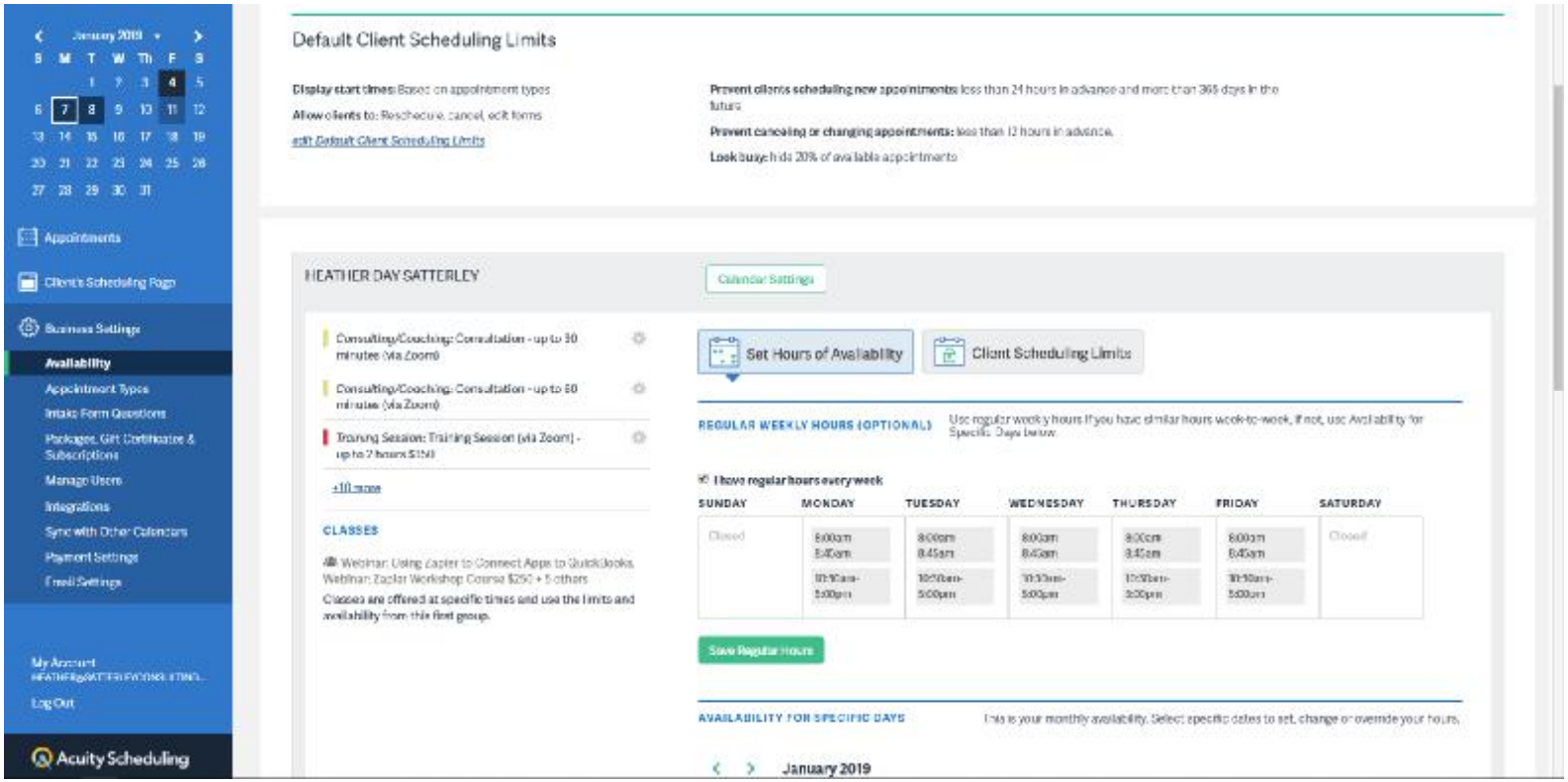
Branded Scheduling Page



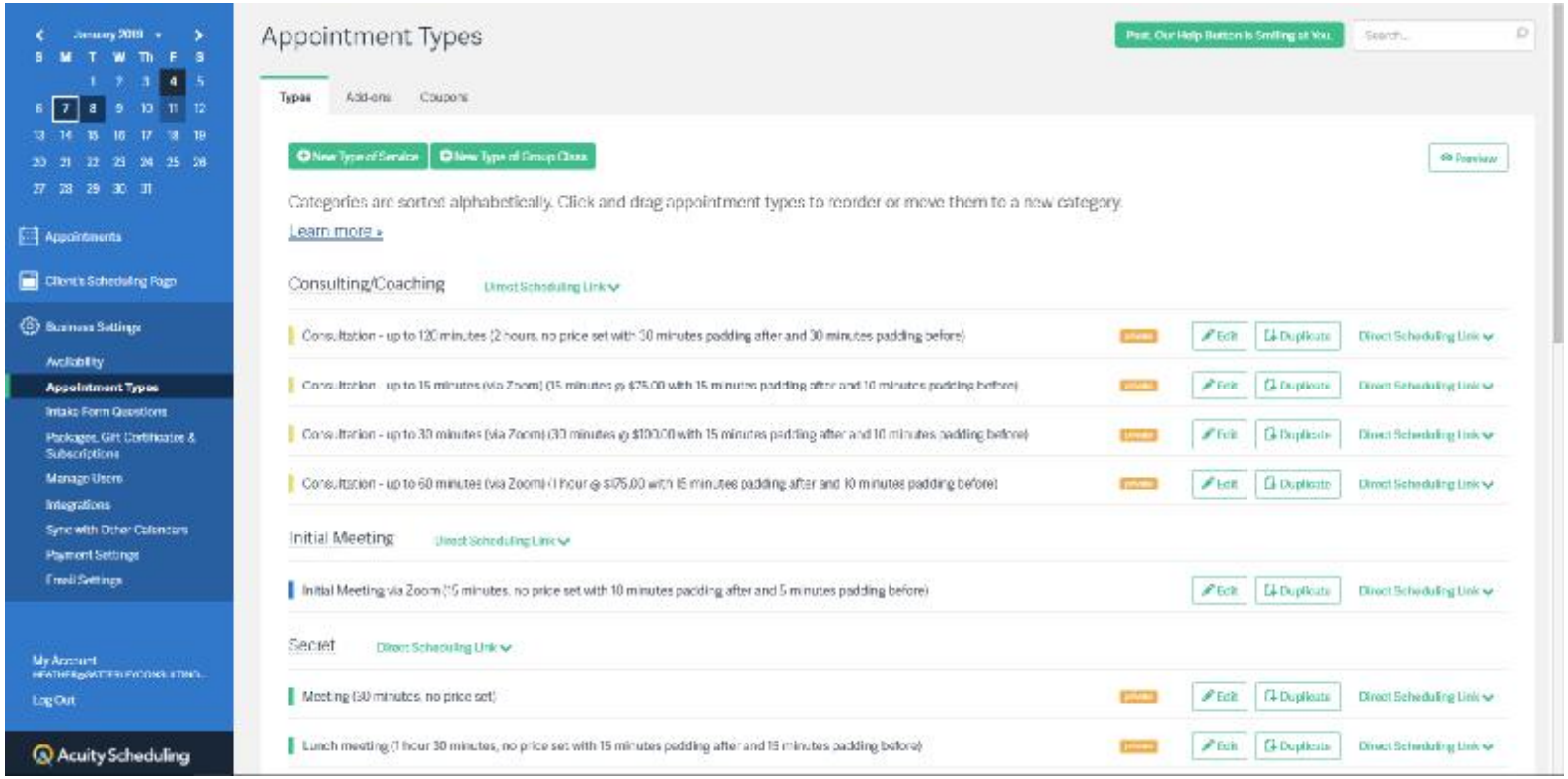
Embedded Scheduling Page



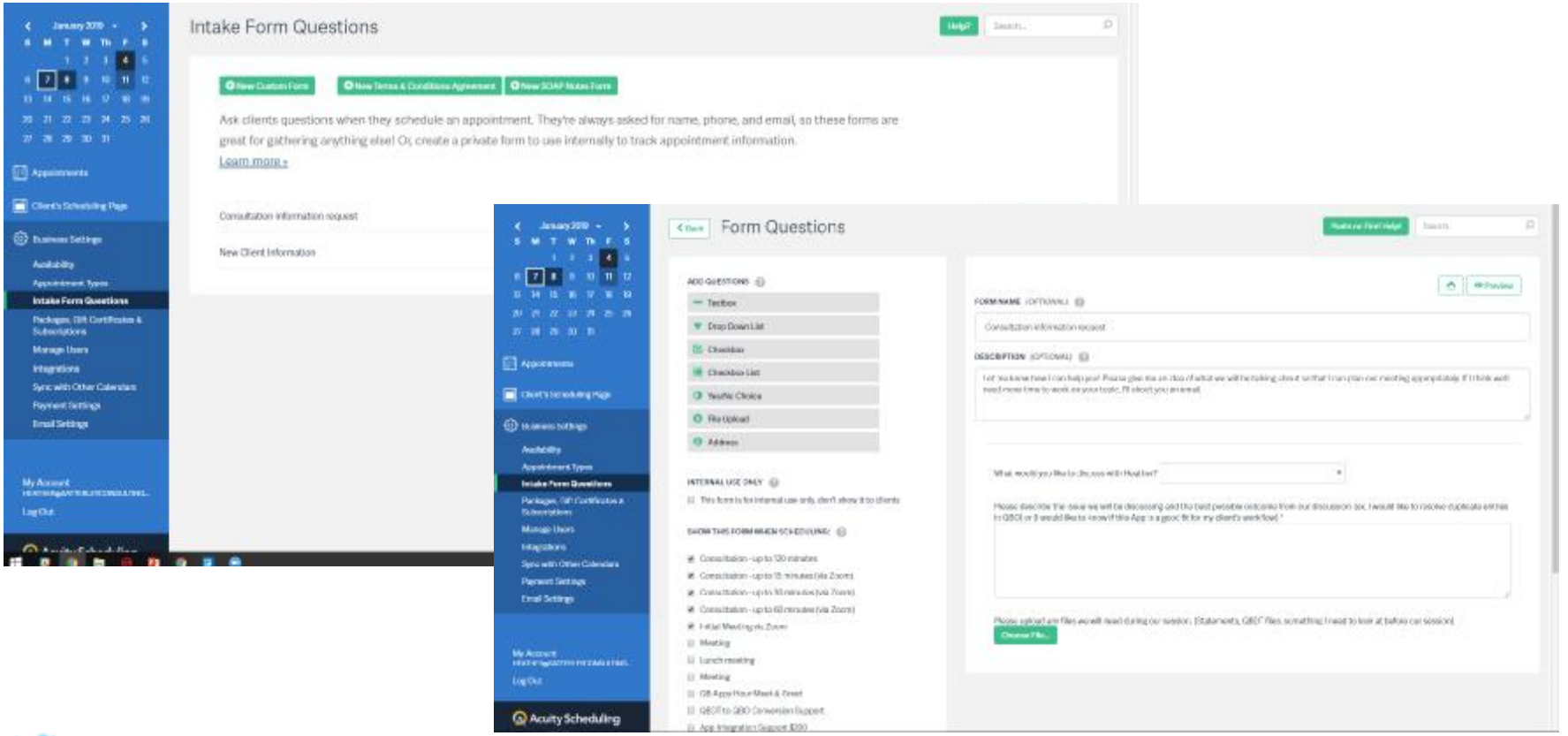
Control Availability



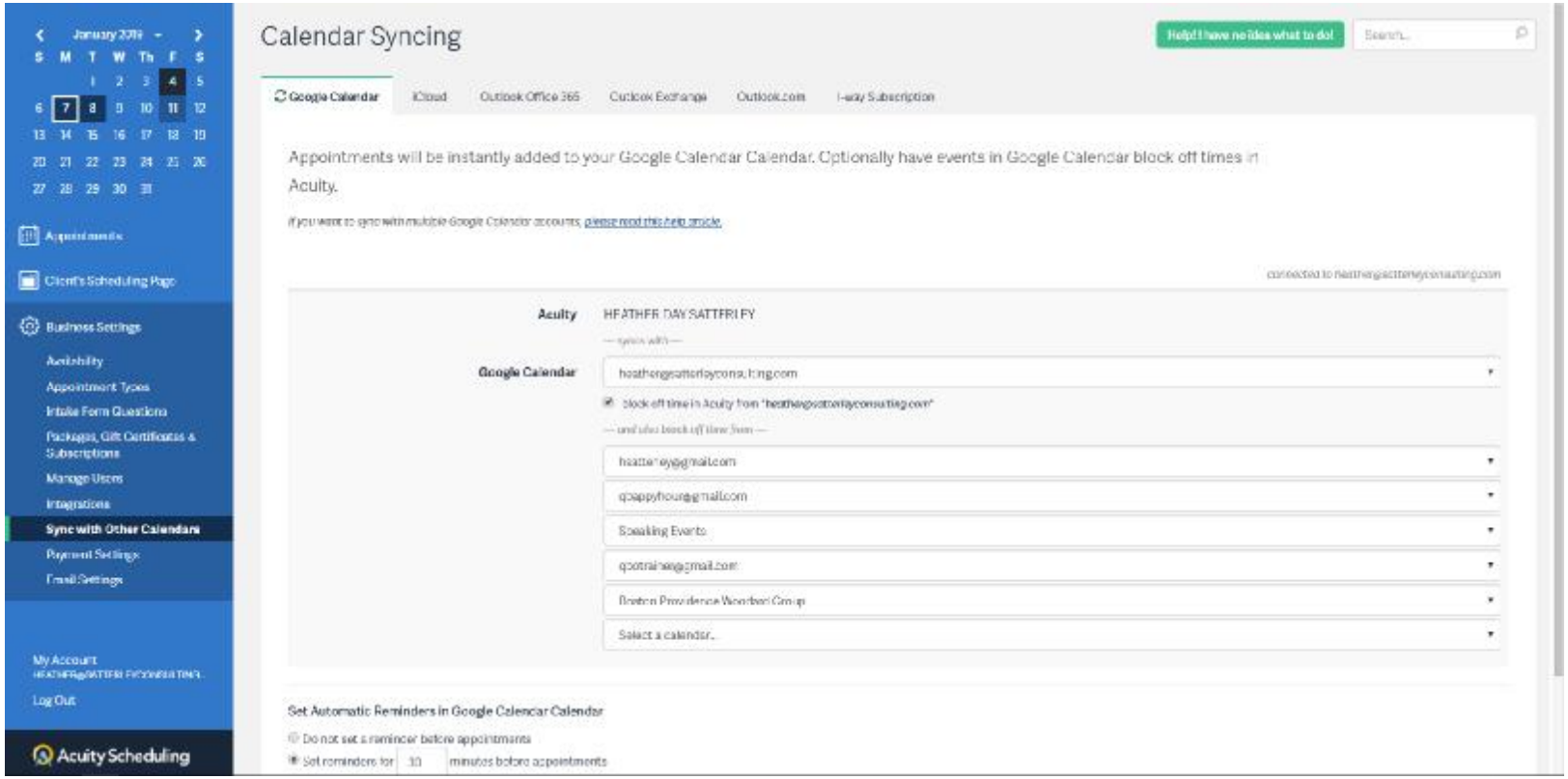
Unlimited Appointment Types and Categories



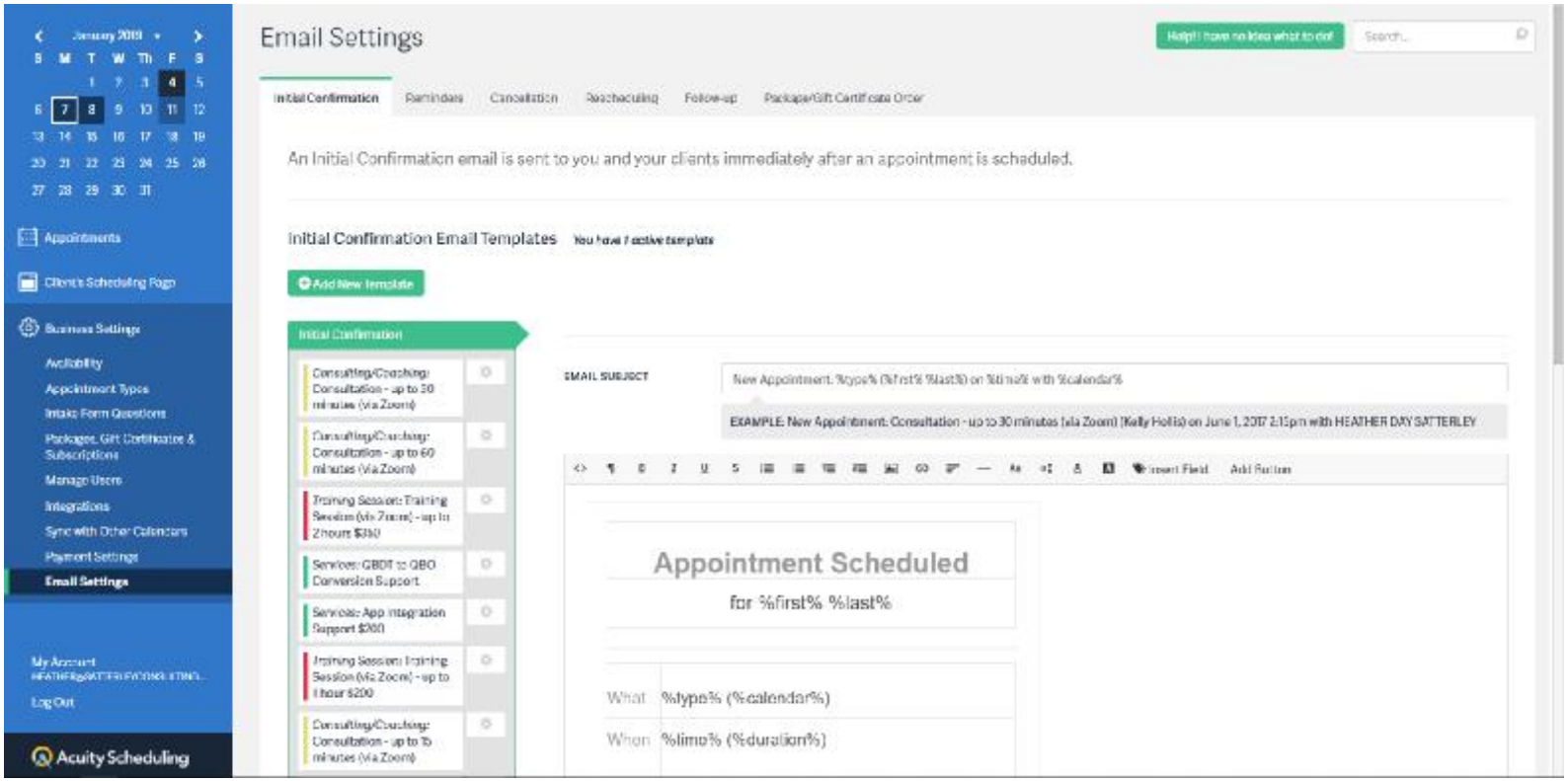
Create Intake Forms



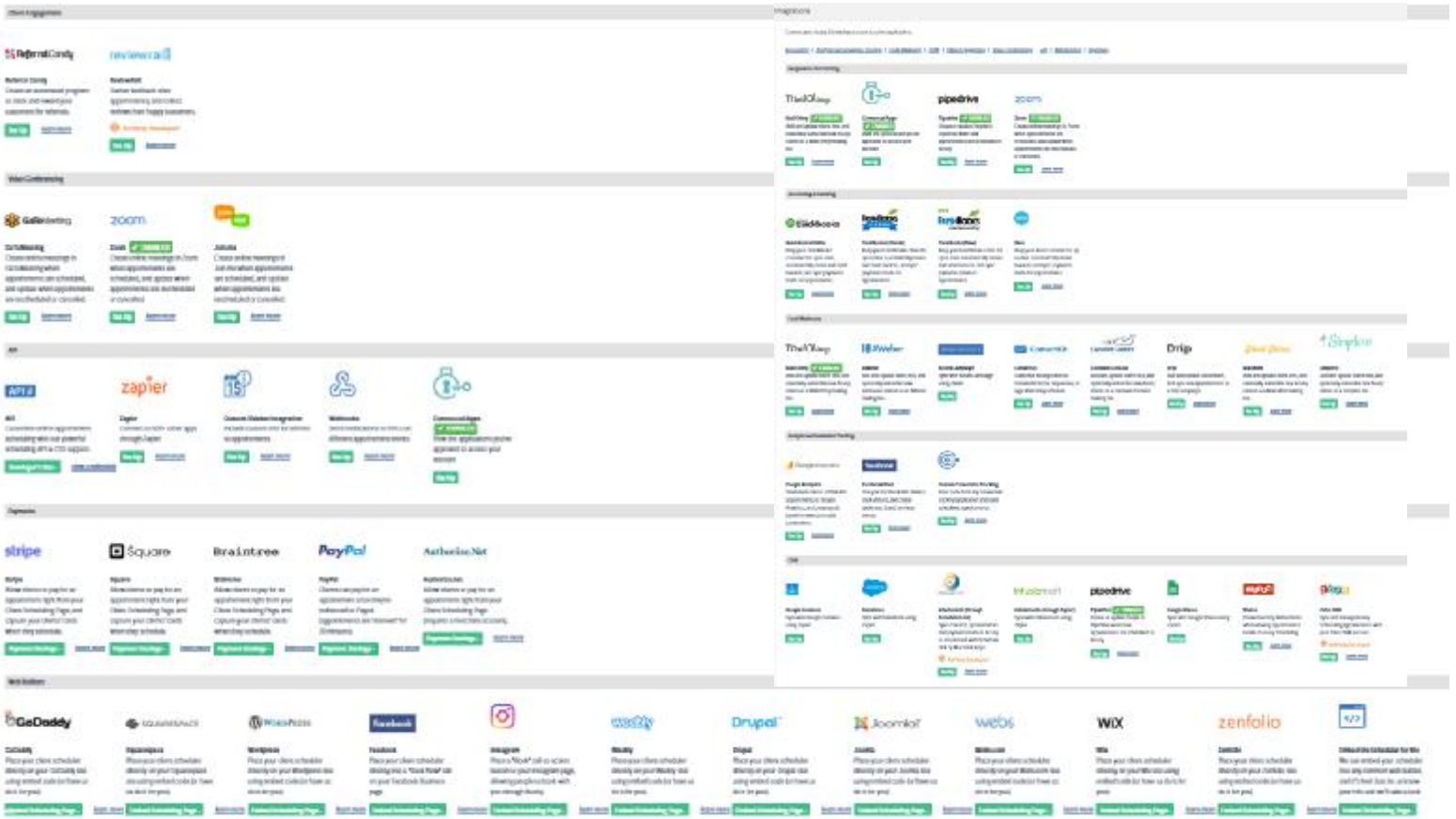
Sync with Multiple Calendars

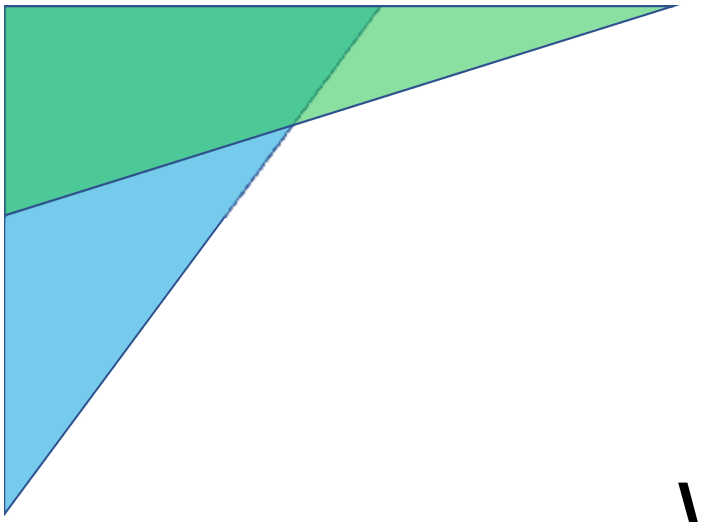


Customized Email Notifications



Tons of Integrations!!!!!!!!!





The QB 'APPY HOUR with Liz & Heather

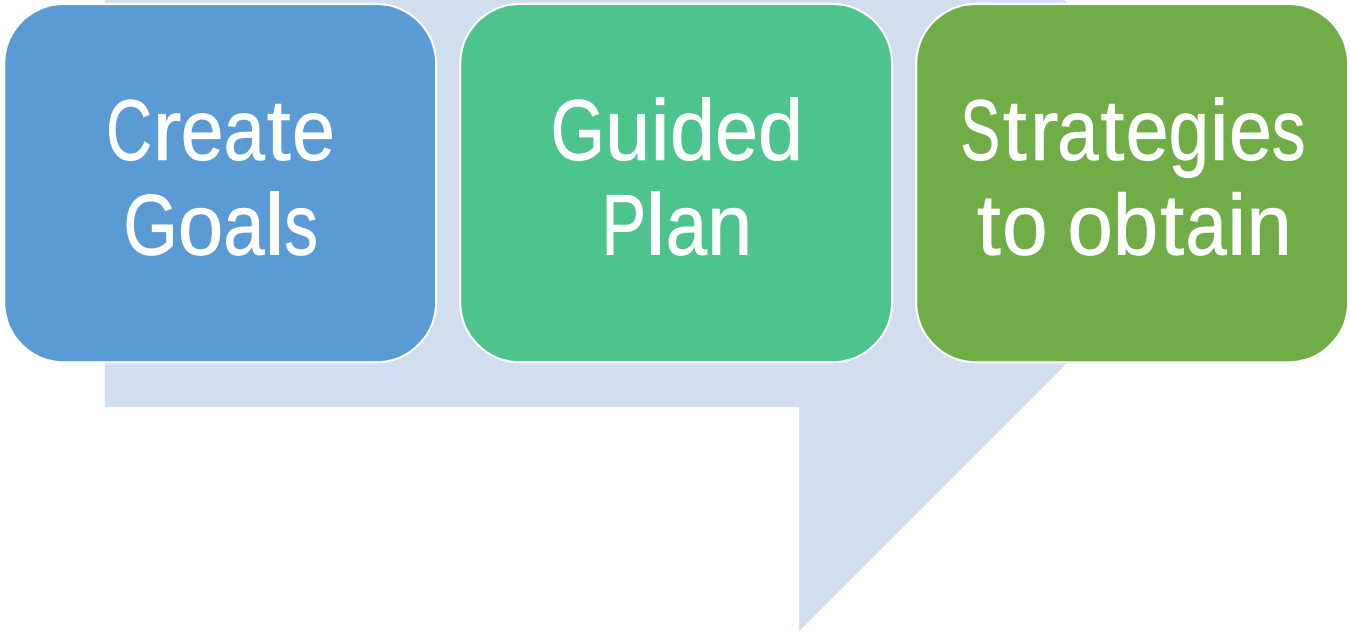
What do you use?

Making More Money

Consider adding Strategic Advisory Services!

The QB 'APPY HOUR with Liz & Heather

Strategic Advisor



The QB 'APPY HOUR with Liz & Heather

KPI – Key Performance Indicators

Measurable

Data

Let’s Raise a Toast to….LivePlan!

STRATEGIC ADVISING

with LivePlan

KATHY GREGORY

Director of Strategic Development and Engagement,

Palo Alto Software

LivePlan

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

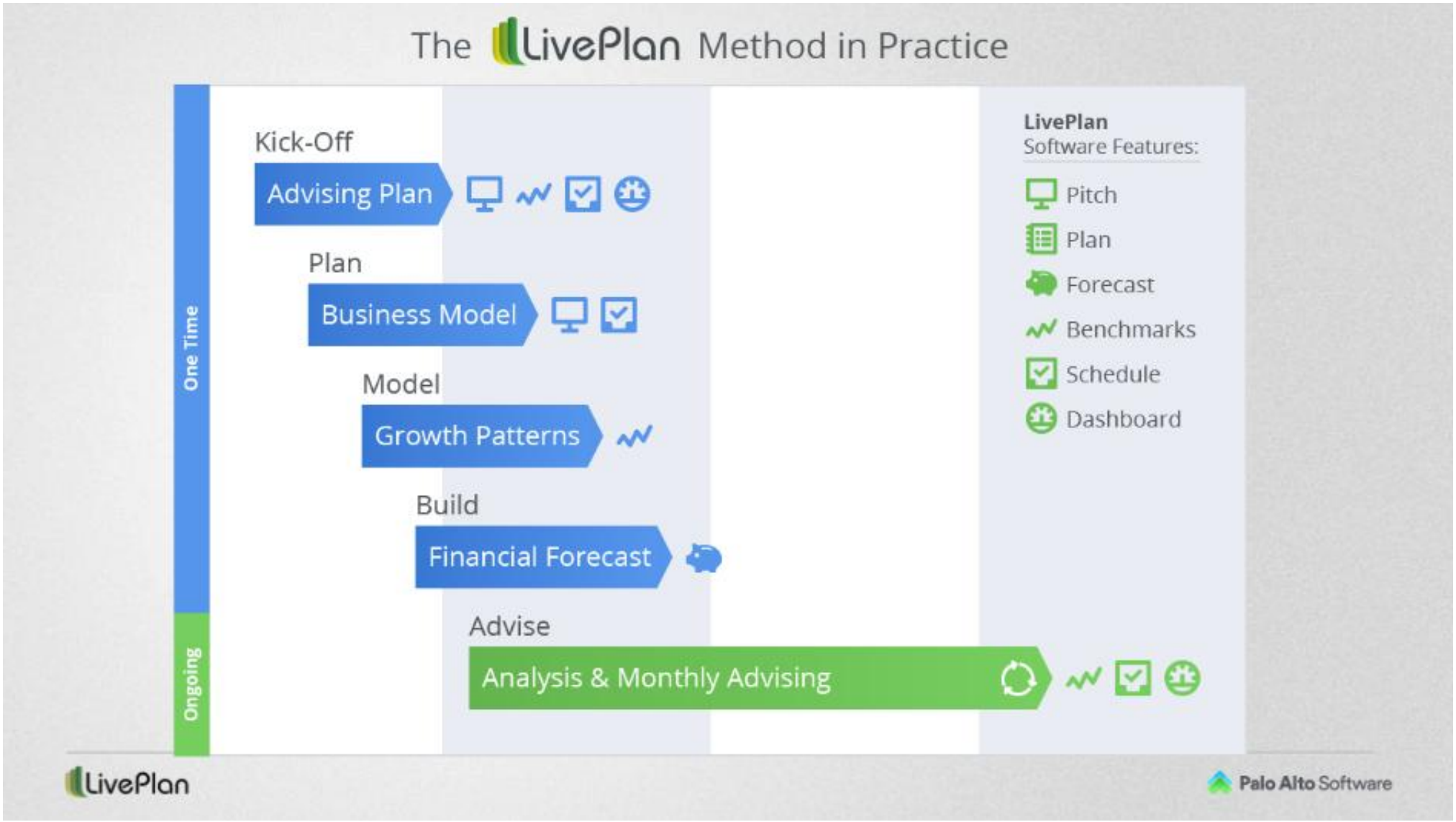
THE LIVEPLAN METHOD

A LIVING PLAN

LIVEPLAN METHOD

LIVEPLAN BEST PRACTICE

Make a system


The LivePlan Method in Practice
One Time
Ongoing
Kick-Off
Advising Plan
Plan
Business Model
Model
Growth Patterns
Build
Financial Forecast
Advise
Analysis & Monthly Advising
LivePlan
Software Features:
Pitch
Plan
Forecast
Benchmarks
Schedule
Dashboard
LivePlan
Palo Alto Software

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

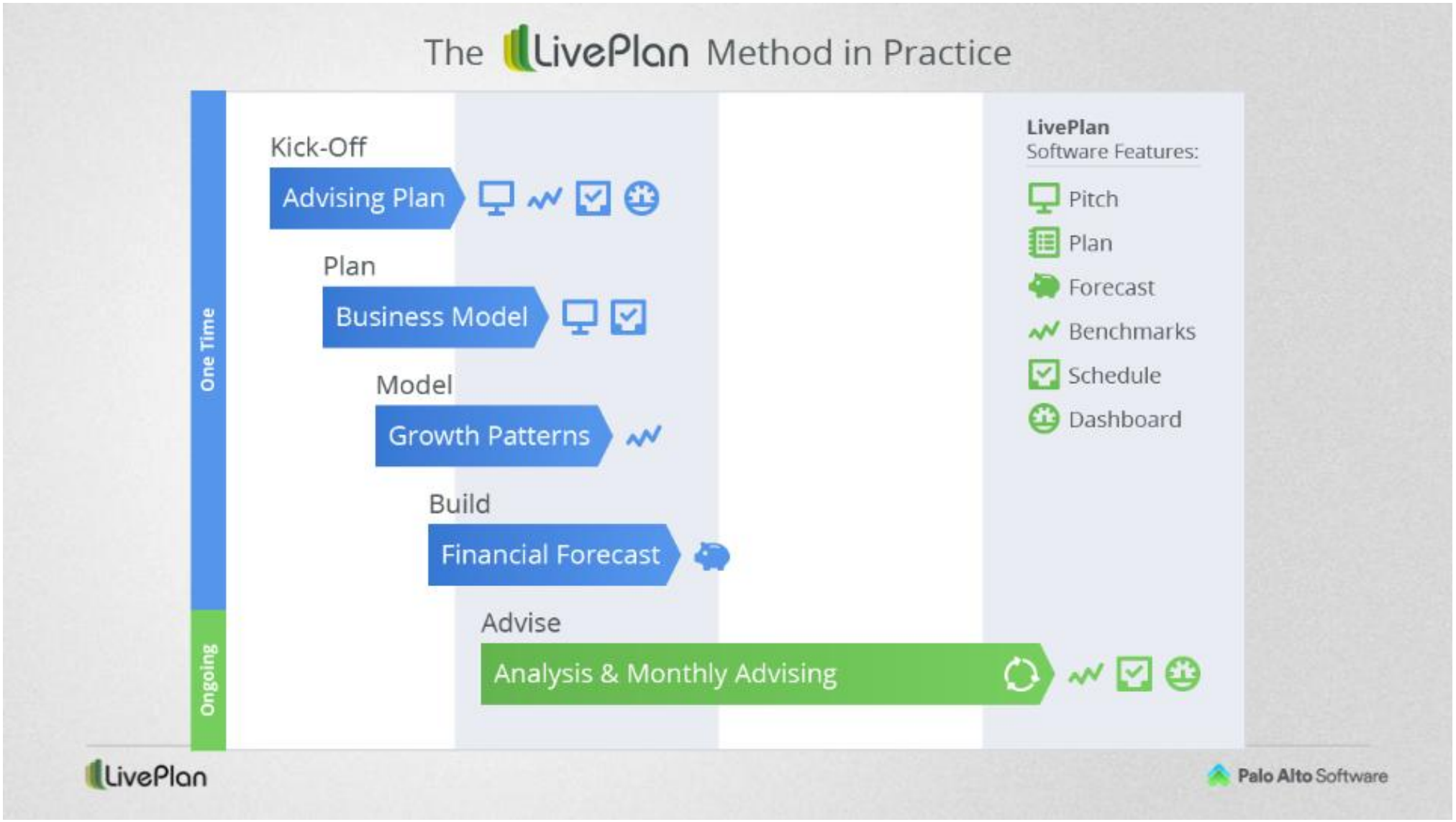
LIVEPLAN METHOD - #5 Advise

Cyclical Meeting

Business Decisions

Adjustments

THE LIVEPLAN METHOD


The LivePlan Method in Practice
One Time
Ongoing
Kick-Off
Advising Plan
Plan
Business Model
Model
Growth Patterns
Build
Financial Forecast
Advise
Analysis & Monthly Advising
LivePlan
Software Features:
Pitch
Plan
Forecast
Benchmarks
Schedule
Dashboard
LivePlan
Palo Alto Software

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

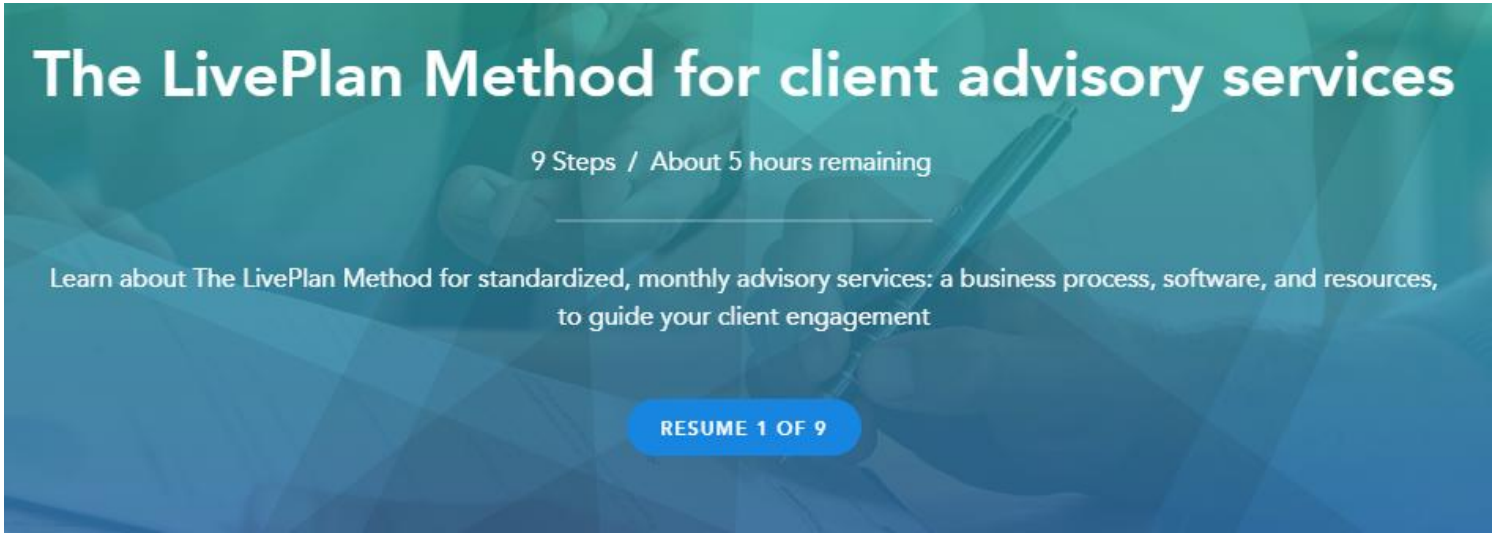
PROCEDURE

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



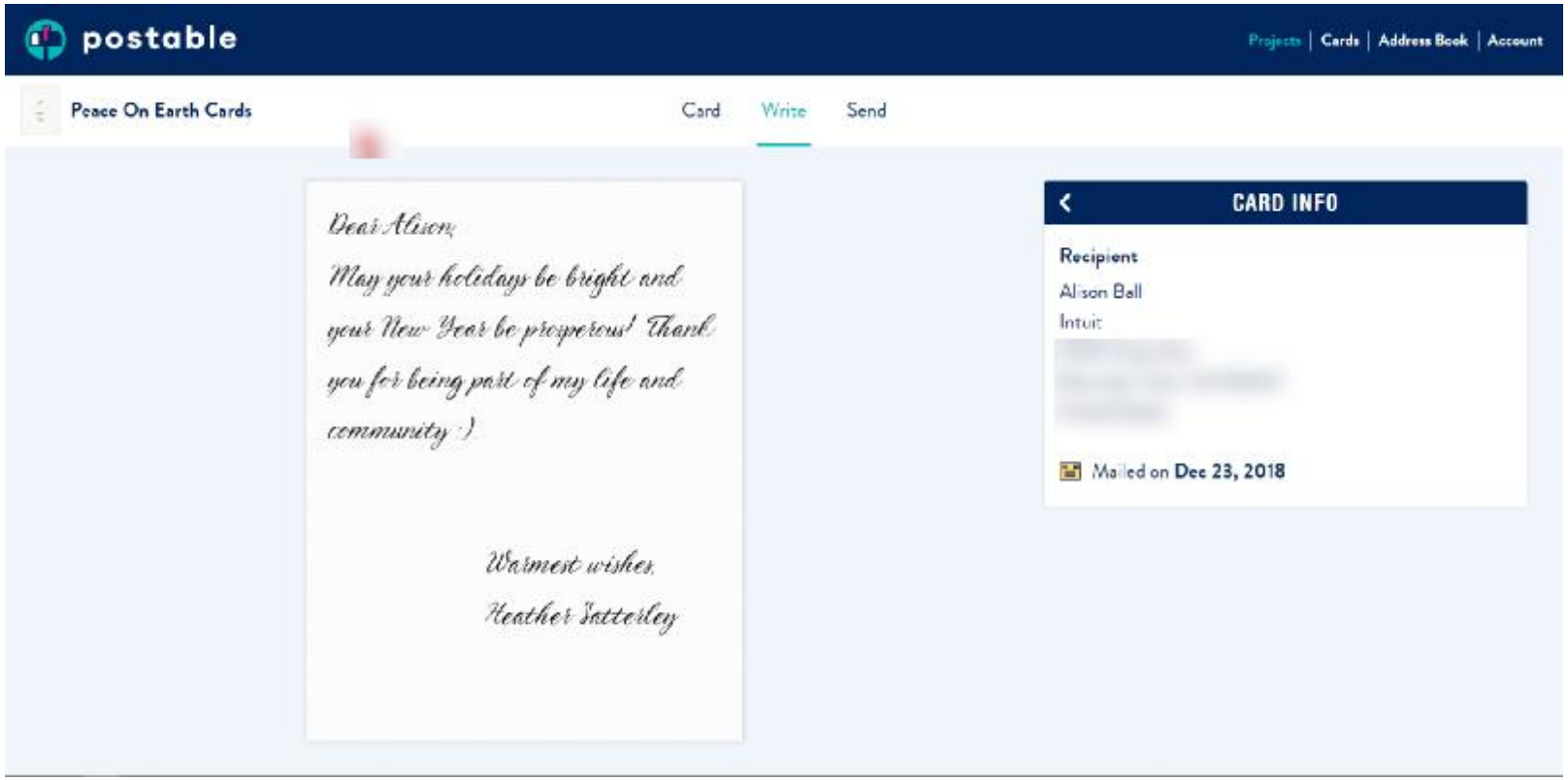
https://strategicadvisors-paslearning.bridgeapp.com/learner/programs/41

The QB 'APPY HOUR with Liz & Heather

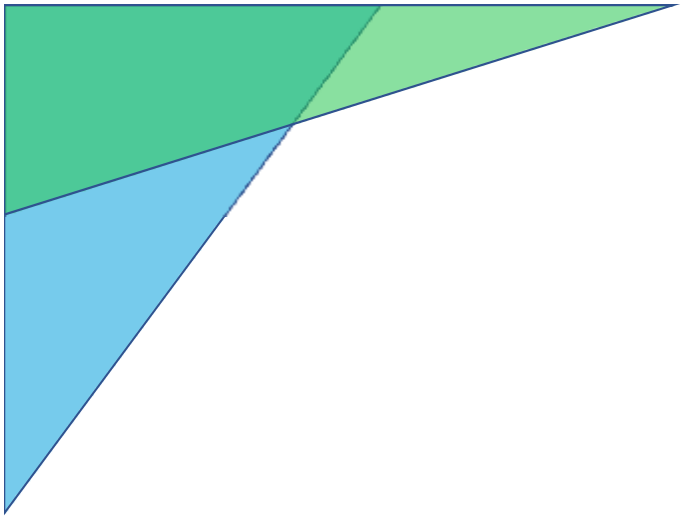
Liz and Heather's Coolest thing we've done with an app this month

EPIC APP FAIL!

Remember Postable?


postable
Projects | Cards | Address Book | Account
Peace On Earth Cards
Card
Write
Send
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

The QB 'APPY HOUR with Liz & Heather



The QB
'APPY HOUR
with Liz & Heather

@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!

The QB 'APPY HOUR with Liz & Heather

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 – hhtps//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