

TimeDriver “Getting Started” Transcript

<http://www.timedriver.com/getstarted/>

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/ indicates where the slide changes or “builds” during the video.

Hello, and welcome to this getting started tutorial for TimeDriver, an appointment invitation system that works with your Google or Outlook calendar. /

The purpose of this tutorial is to help you understand key concepts, get familiar with the TimeDriver user interface, and learn how to create appointment invitations. /

It’s important to understand that appointment scheduling is all about offering timeslots that can be consumed by your customers and colleagues. /

For example, you might invite twenty sales prospects to schedule a phone consultation.

Accepted appointments will FLOW into your calendar automatically, but will never conflict with other commitments. Each customer will consume one individual timeslot. TimeDriver lets you close the loop with customers. Hence, / our little mascot, the boomerang. /

TimeDriver is great for scheduling demos, consultations, clinical appointments, office hours, and other one-on-one interactions. Either on the phone or in person. /

There are three ways to invite people to schedule time with you...

You can send an email invitation with an embedded schedule button, you can include a link on your web site, and you can include a URL on printed materials.

All three methods will initiate a scheduling transaction. /

TimeDriver connects to your Outlook or Google calendar. This is not absolutely necessary, but very helpful. Here's why:

With a connection, appointments will flow into your calendar automatically, and TimeDriver will be sure to offer times that do not conflict with your other commitments. /

Let's take a look at how the calendar connector works...

If you're an Outlook user, TimeDriver will connect to your calendar using an Outlook plug-in. / As you can see, TimeDriver has placed a small tool bar on the Outlook menu. The green status indicator tells you that TimeDriver and Outlook are connected. / We can see that this Outlook calendar already contains some commitments: A staff meeting. A concall. Lunch with the audit team. And so forth. /

Let's see how this Outlook information is used in TimeDriver.

Imagine that we want to invite job candidates to schedule a 30 minute screening interview. TimeDriver will ask us to define windows in which we are willing to accept appointments for screening interviews. We simply click and drag on the calendar grid. /

We might decide to open windows on Wednesday, Thursday and Friday morning. Later, when job candidates respond to our invitation, TimeDriver will offer times that fall inside these windows. / Now, here is where Outlook comes in. Remember that TimeDriver is connected to our Outlook or Google calendar. TimeDriver lets us preview what times would be offered taking into account the busy times in our calendar. Here is our concall, and our lunch with the audit team.

TimeDriver will offer times that fall inside the windows, but will not offer times that conflict with our other commitments.

To put this all in context, let's walk through the entire invitation process for the example of scheduling screening interviews with job candidates.

In our example scenario, an HR Manager has sorted through dozens of resumes and has identified her top candidates. Now, she is ready to invite them for screening interviews using TimeDriver.

We refer to the HR manager as an "inviter" and the job candidates as "invitees." /

A wizard in TimeDriver guides the inviter through three easy steps.

We start by defining an activity called "Employment Screening Interview" with a duration of 30 minutes.

Then we define availability windows when we are willing to accept appointments for screening interviews.

Finally, we decide how we want to invite appointments for screening interviews. We have three options, and for this example we will demonstrate email invitations. /

Let's look at the TimeDriver wizard process.

If the HR Manager is a brand new user of TimeDriver, she will start with an empty dashboard that shows no appointment activity. We'll explore the dashboard in a moment, but for now we will stay focused on the wizard process.

Our first step is to create a new activity that we will offer for appointments.

We'll create an activity from scratch. The wizard asks us to choose a name for our activity and we'll enter Employment Screening Interview.

Then, we'll choose a duration of 30 minutes from the pull-down menu.

Then, we'll specify that appointments will be held by phone rather than in person... and have TimeDriver prompt our candidates to provide a phone number where we can reach them.

Next, we'll define windows in which we are willing to accept appointments for screening interviews.

As you saw before, we simply click and drag on the calendar grid. TimeDriver will offer times that fall inside our windows, but will not offer times that conflict with our other commitments. /

After defining availability windows, we have some additional options. We could skip this step but the options are pretty cool so I'll take a moment to show them to you. / We can create a Welcome Message that will be shown to invitees when they begin scheduling an appointment. /

TimeDriver provides a simple edit window that makes it easy.

We'll start by entering text for the Welcome Message.

We'll enter "Choose a convenient time for a 30 minute screening interview"

We can enter text directly, or copy and paste from another source such as Microsoft Word.

Let's center the headline and make it bigger.

Now, let's insert a photo to personalize the message. This can make a big difference in setting the stage for your appointment interaction, and puts a friendly face on your organization.

We'll put a little extra spacing around the photo and preview the Welcome Message to make sure it looks just right.

The Preview window lets us see how the Welcome Message will appear to our job candidates.

Everything looks right, so we'll save the welcome message and move on. Remember, the welcome message is optional.

We also have the option to prompt our candidates to answer a question during the appointment scheduling process.

We'll ask our candidates if they have ever worked from home in a virtual call center. /

And that's it. We have successfully created an activity called Employment Screening Interview and we are ready to begin taking appointments.

TimeDriver has published a Web Address where candidates can schedule their interviews. We could put this address on printed materials or use it as a link on a Web site.

But for this demonstration we'll create an email invitation.

I'll click finish and show you how to come back later to create the invitation. /

By the way, there are two ways to exit TimeDriver.

If you sign out when you exit, you'll need to give your email address and password next time you sign in.

If you simply close the TimeDriver window in your browser, your system will retain a cookie that will sign you in automatically the next time you open TimeDriver. /

Now, let's create an email invitation. /

A wizard in TimeDriver asks for the purpose of this invitation.

We indicate that we want to invite people to schedule an Employment Screening Interview.

Next, we enter or paste email addresses for all our job candidates in the Send To box.

Each candidate will receive a private email invitation and will not see the names or addresses of other candidates.

Next, we enter a subject line for the email message

And we enter or paste the message itself.

Finally, we have an opportunity to edit the text that will appear on the schedule button embedded in each email invitation.

We'll enter "Click To Schedule A Call for a 30 min screening interview"

We can preview the email message to make sure it looks right, just as we did with the Welcome message. The button is a great call-to-action that will lift your response rate.

And that's it – we click the send button on our invitation is on its way. TimeDriver has sent an invitation to each of our job candidates. /

Remember, each candidate will receive a private email invitation and will not see the names or addresses of other candidates. /

Now, let's imagine that we are one of the candidates so we can see how the invitation works. /

Here is the invitation as it arrived in the candidate's in box. The schedule button stands out, so it's easy to take action. We'll click to schedule a call. /

Here is the Welcome message from Patricia Ott, the HR Manager. / And here are her available times on Wednesday, Thursday and Friday morning... taking into account her busy times, and times that have already been consumed by other candidates.

We'll choose Thursday at 10 AM.

Now, we'll provide a number where we can be reached for the call

And we'll answer the question about our experience in a virtual call center.

That's all there is to it. We submit the appointment request / and our appointment is confirmed. /

Whenever a candidate schedules an appointment, it appears in the HR Manager's TimeDriver Dashboard. Here, we can see that three candidates have already responded. / And because TimeDriver is connected to Outlook, the same three appointments have flowed into her Outlook calendar automatically.

Before long, all the appointments will flow in, without anyone having to play phone tag or email tag. Everyone is happy. /

Now, I want to show you one more thing before we reach the end of this tutorial.

When you begin using TimeDriver, you'll start with a blank dashboard. But once you begin creating invitations, / the dashboard will fill up.

Here's a quick look at how the dashboard is organized. In this example, we are looking at the dashboard for a user at a banking institution. A menu on the left-hand side of the dashboard let's us control the view. We can see / appointments flowing in for an asset lending overview, / for touching base with existing clients, / and for VIP meetings at an upcoming trade show. /

We can see email invitations sent out to drive those appointments, / and we can see activities that we have defined and made available for scheduling

/ You can easily drill down in each view to get additional information. / For example, you can drill down to see who has responded to an email invitation and who has not. /

Thank you. I hope you have enjoyed this Getting Started tutorial. You have all the information you need to begin using TimeDriver.