

## TAKE BACK YOUR DAY WITH SCHEDULING SOFTWARE

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The back-and-forth required to schedule appointments with clients and opposing counsel can add up to a significant amount of time and frustration. Further, many tech savvy clients have little interest in calling your office to schedule an appointment. You can take the hassle out of scheduling and let clients and opposing counsel schedule appointments directly on your calendar with scheduling software such as Microsoft Bookings or Calendly.

### HOW IT WORKS

In a nutshell, scheduling software reads your calendar for times that you are unscheduled. You send out a link and the recipient selects from a list of available times. The appointment is automatically added to your calendar.

Because the scheduling software is continually reading your calendar, you don't have to worry about conflicting appointments being scheduled. As soon as you schedule something on your calendar or someone schedules an appointment, that time is no longer offered to others scheduling appointments.

### PROTECTING YOUR TIME

If the idea of letting others schedule appointments on a whim terrifies you, you're not alone. When using scheduling software, it's important to protect your time so that you have space to get work done and don't end up in eight hours of back-to-back meetings.

#### TIME BLOCKING

Time blocking involves scheduling an appointment for you to get work done. Create a calendar appointment just like you would for a normal meeting. Have a brief due in a week? Block off a few hours each day to work on it. Need to draft a large estate plan? Block time for it. Blocking time not only prevents people from scheduling appointments during that time, it also ensures that you have time to focus.

#### BUFFER TIME

Many scheduling applications allow you to add buffer time before or after appointments. Buffer time increases the amount of time scheduled on your calendar, giving you a break between meetings or time to prepare. If you add 15 minutes of buffer time to an hour appointment, the scheduling software will only show times where you are unscheduled for at least 15 minutes before the appointment start time. Once the appointment is scheduled, an hour and 15 minutes will be scheduled on your calendar, preventing anything else from being scheduled during the buffer.

### STAFF

Many scheduling applications allow you to add others in your organization. Some allow group appointments and others allow you to schedule an appointment with one person from a pool of people.

#### GROUP APPOINTMENTS

Some allow you to create "group appointments" where multiple people in your organization must be available for the appointment. For example, if you need all of the people involved in a case to be present at an appointment, you can set it to only show times when everyone involved is available.

For example, John and Jane both need to be in a meeting. On Friday, John is available from 10 am to 2 pm and Jane is available from noon to 4 pm. The software will only show appointment times between noon and 2 pm, when both of them are available.

## SELECT A STAFF

Others allow you create appointments that can be scheduled with one of many people in your organization. If, for example, multiple attorneys in your firm can meet with prospective clients, you might want to set up an appointment that combines the availability of multiple people. You can elect to show the options to the person scheduling the appointment in a dropdown menu or hide the list.

For example, John and Jane can both meet with prospective clients. On Monday, John is available from 10 am to noon and Jane is available from noon to 2 pm. The scheduling software will show appointment times from 10 am to 2 pm and schedule the appointment on the appropriate person's calendar.

## SET UP MULTIPLE APPOINTMENT TYPES

Most scheduling applications allow you to set up multiple appointment types. Set up different appointment types for different lengths of time, different appointment locations, or appointments that require participation of different people. You might need separate appointment types for meeting with prospective clients, video conferences, in person meetings, and execution of documents.

## INTEGRATION WITH VIDEO CONFERENCING

Many scheduling applications integrate with video conferencing software, automatically scheduling a video conference when an appointment is booked. Details for how to join the video conference are automatically sent to the attendees. Microsoft Bookings, for example, integrates with Microsoft Teams and Calendly integrates with Teams and Zoom.

## SOFTWARE AND SERVICES TO GET YOU STARTED

[Calendly](#) is the most feature-rich of the scheduling web services. It will work with calendars from Apple's iCloud, Google Calendar, and Microsoft 365. In addition to scheduling in-person meetings, you can use it for conference calls and web meetings. Calendly can schedule meetings via Zoom, Google Meet, Microsoft Teams, Webex, GoToMeeting, and Join.me. You can embed a Calendly scheduling calendar on websites hosted on Squarespace, Wix, and WordPress. You can offer different calendar events, such as "Initial Client Meeting," "Document Review with Client," or "Client Signing," and each type can have its own scheduling parameters (*e.g.*, perhaps documents signings are scheduled for Thursdays only and need two hours blocked for each). Furthermore, you can setup workflows that act as reminder emails sent to meeting attendees, such as at 24 hours and 1 hour before the event's start time. Calendly offers several [pricing tiers](#), from a basic free account up to enterprise plans for 30 or more employees.

Another option in the space is [Microsoft Bookings](#), which may be attractive to Microsoft 365 customers as it is included in many 365 subscriptions, so there is no additional cost to experiment with web-based scheduling. Beyond its "already included" status for 365 subscribers, the primary differences between Bookings and Calendly is that Bookings is simpler, because it has fewer options, and it integrates only with Teams for video conferencing; no Zoom, Google Meet, or anything else. However, since it is free, it may be a good starting point.

Unlike Microsoft, Google does not offer an external/client-facing scheduling tool as part of a Workspace subscription. Fortunately, Calendly works well with Google Calendar and Google Meet, so starting with a free Calendly account is a good solution.