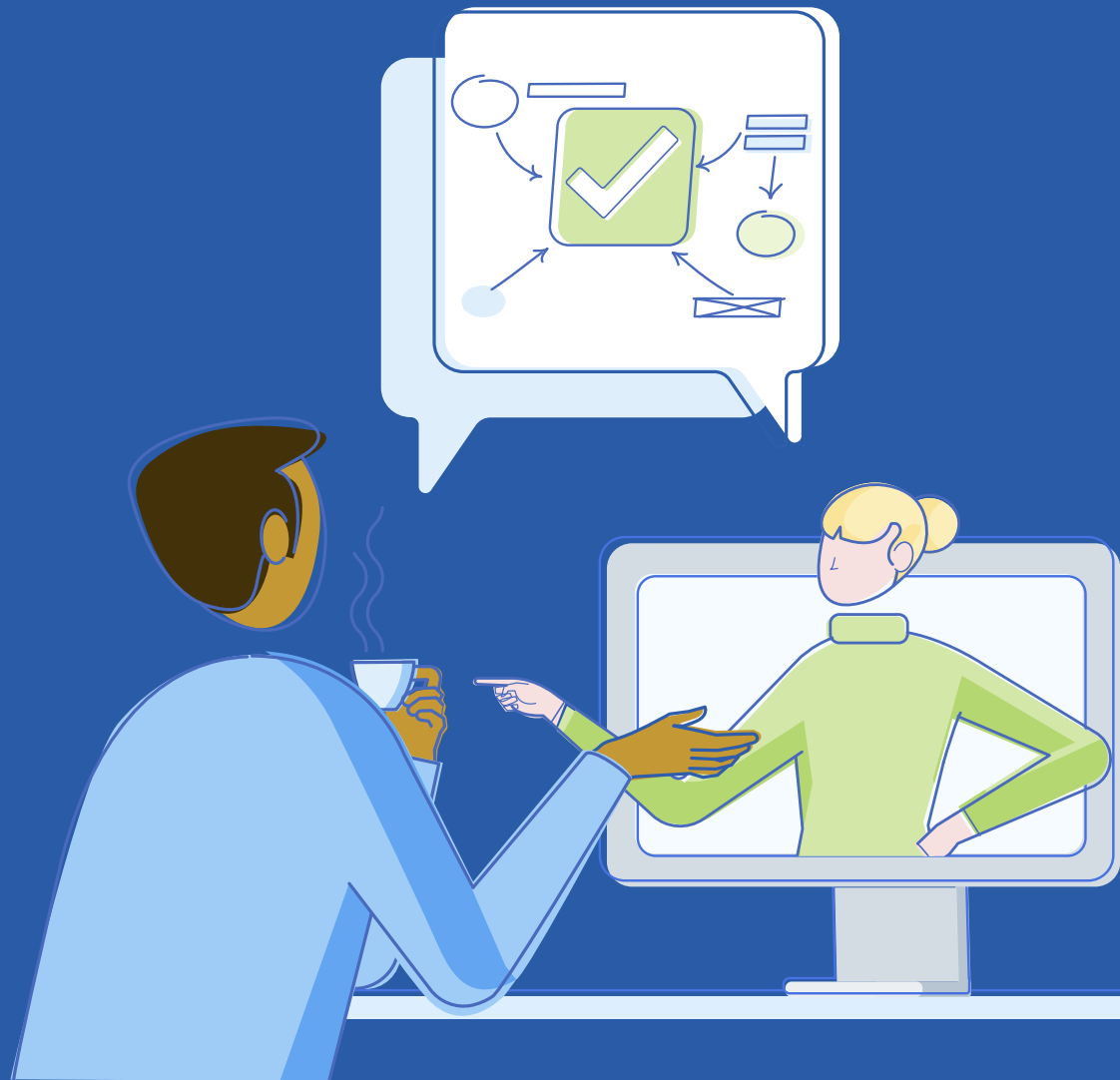


Doodle

CLIENT-FACING PLAYBOOK



**WHITE PAPER
MARCH 2020**

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Introduction

How can you quickly and accurately determine the potential of a company? Sales pipeline? Experience within the boardroom? The quality of its products or solutions? Maybe. But for a more exact gauge, you'd do better to take a look at the experience it delivers to its clients and potential customers.

Globally, between 50 and 100 million new businesses launch each year. So, no matter your industry or sector, chances are that there's an abundance of suppliers and competitors in that space. When other suppliers can offer the same products or services, the real differentiator is the experience you provide.

Research from McKinsey reveals that brands focused on improving their client experience increase revenues by 10-15 percent while simultaneously reducing their costs by 15-20 percent. For client-facing industries, such as sales, recruitment, consultancy, creative agencies and financial firms, the argument in favor of creating

better client experiences is clear.

But what precisely does a better client experience mean? Being client-focused is as much about how you do business as it is the way you communicate with clients. Successful client-facing organizations are continually searching for ways to make doing business with them quicker and easier. They're on the hunt for speed ramps and roadblocks to remove. They don't adapt their current processes to be client-focused, but they create strategies rooted in client experience.

And that's where automation comes in, allowing companies to service more clients without sacrificing the overall client experience. This playbook will explain how automating your meeting process can help client-facing companies land new business and retain existing clients by delivering a better experience for both your clients and your employees alike.



Client Facing? The Major Scheduling Challenges

“A satisfied customer is the best business strategy of all.” — Michael LeBoeuf, best-selling author and management professor

The term “client-facing” describes a vast range of professionals and sectors. Professional client-facing roles include recruitment and talent acquisition managers, financial advisors, technology and solution sales, realtors, consultants and account managers.

However, from consultant to financial advisor, all client-facing roles are about creating and maintaining relationships with clients to create

Neverending Email and Phone Call Back-and-Forth

Most companies still rely on time-consuming and non-automated methods of getting meetings into the books, such as haphazard calling by phone or, worse still, the eternal game of email ping pong.

Not only is this manual approach to scheduling slow, the constant switching between tasks, like checking schedules and sending emails about availability while trying to research new business opportunities, can make employees a whopping 80 percent less productive.

Plus, dealing with frustratingly repetitive or menial tasks like scheduling - instead of more profitable tasks that likely form a central part of their OKRs or KPIs - is one of the leading reasons employees become disengaged.

Disengaged employees are not only a drain on company finances and morale, they’re also more likely to take time off sick and leave your firm, all of which harm your bottom line.

value for them and you. Whether it’s pitching new campaign concepts, offering a new SAAS solution, upselling a new product or report, or approaching a candidate about a suitable vacancy, much of this value creation takes place in the real or online meeting room.

Any inefficiencies in the meeting process are therefore hindering the success and growth of your business. As all experienced client-facing professionals are only too aware, there are always barriers when it comes to organizations’ meeting capabilities.

Dispersed Participants Working Across Time Zones

While multinationals are already accustomed to the disruption of working across multiple countries, continents and time zones, it’s increasingly a challenge that even small and medium-sized companies have to face due to trends, such as the rise of the remote workforce and the gig economy.

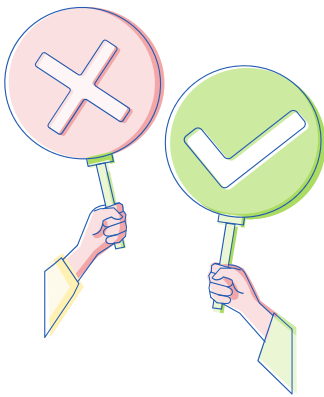
- Remote work creates a far bigger talent pool, but it complicates communication due to an increasingly dispersed workforce. Scheduling meetings suddenly requires regularly Googling the time in Mumbai or Rio de Janeiro, while the window for convenient appointments grows narrower.
- Companies of all sizes increasingly lean on the gig economy to help them scale up and lean down quickly in response to demand. However, this means more meetings with employees who don’t use the company’s email or calendar tool of choice, giving little insight into their availability.

Getting the Right People At The Right Time

One-third of professionals believe that their company is negatively impacted by the relevant people being absent from meetings.

Not having all the key stakeholders and decision-makers in the room can slow down significant projects, impacting your client experience and your ability to create value for your clients.

It can take a Ph.D. in time management to find convenient meeting slots for large groups at the best of times, but the more senior the participants, the more clogged their agendas.



Losing Revenue or Opportunities

One-third of US professionals believe that unproductive meetings and scheduling processes are the biggest threat to their company.

Forty-four percent believe that poorly-organized or unnecessary meetings leave them no time for more critical tasks, while 37 percent claim that all the meetings distract them and make it hard to focus on critical projects.

However, 26 percent of professionals believe that poor scheduling processes around client meetings weaken their company's relationships with their clients.

Make it difficult for clients to meet with you, and you make it difficult for them to stay with you.

Many Meetings Are Bad Meetings

The American economist Thomas Sowell once commented, *"People who enjoy meetings should not be in charge of anything."*

According to our State of Meetings Report, around 70 percent of busy professionals in the US, UK and Germany believe that bad meetings cost them valuable time.

For 89 percent of respondents, poor organization is the cause of the issue. Too many meetings lack a concrete agenda, while most pre-reads tend to get read during the first 30 minutes of the actual meeting.

And... Back to Square One

You've finally scheduled that important meeting.

You've spent hours trading emails. You've looked up the time in several countries and found a suitable slot. You've shared an agenda and attached a pre-read, and it's all only taken a few days' work.

And then it happens: "Sorry, something's come up last minute - need to reschedule."

Not only do you need to start the whole cumbersome process again, but data suggests that a large percentage of no-shows disappear from schedules forever.



How Automating Your Meeting Process Drives Business

Companies that adopt a growth mindset, constantly assessing and improving their processes, are more likely to excel in crucial areas.

However, it's also important to remember that better processes are not a goal in and of themselves.

Faster Response Times Win Business

A decade ago, a study published in the Harvard Business Review highlighted the importance of the one-hour sales rule.

When a salesperson contacts a prospect within one hour of their first contact, they are sixty times more likely to turn the opportunity into a customer than if they waited a full 24 hours before following up.

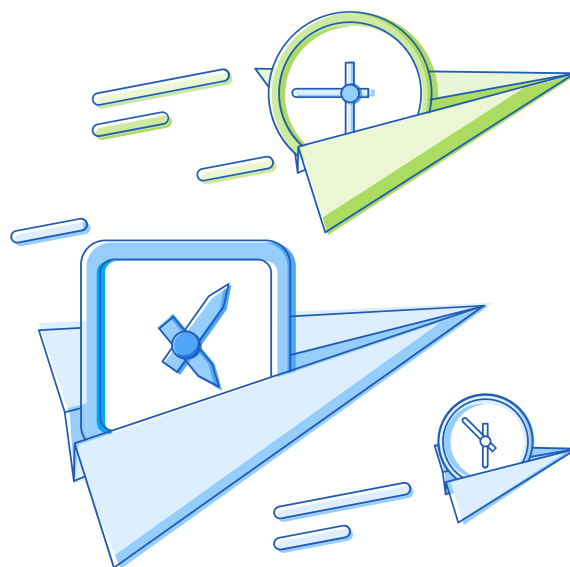
In the decade since, the one-hour rule became the five-minute rule. If you contact a new lead within five minutes, you are 100 times more likely to reach them and 21 times more likely to successfully qualify them than if you leave it just 30 minutes.

An incredible 78 percent of customers buy from the company responding to their interest first.

The reason to invest in improving and automating your organization's meeting processes is that it impacts the bottom line; it increases your number of clients while maintaining or augmenting the number of clients you're able to serve well and retain.

The same principles apply outside of the sales realm, be that contact from a potential new client, an existing client interested in a new product or service, or contacting a high potential candidate who's on the hunt for their next career move. Reacting quickly provides a competitive advantage.

It's not only about the initial response. Failure to successfully schedule meetings due to an inability to find a suitable time slot is one of the most common and yet avoidable causes of lost business. Using a quality scheduling tool can avoid losing leads in this way and ensure that any initial inquiry is contacted within five minutes and has a meeting booked within ten.



Meet Clients Where They Are

“We need to stop interrupting what people are interested in and be what people are interested in” — Craig Davis, Former Chief Creative Officer, J. Walter Thompson Worldwide.

B2B buyers spend considerably more time independently researching solutions providers than talking to them. They will never be more interested and engaged in your company than when they’re proactively visiting your website, reading your newsletter or looking at your social posts.

Building Better Relationships

It’s five times cheaper to retain a current client than to attract a new one, so focus on nurturing existing clients at all times.

The main reasons why clients sever ties with their current agency, firm or supplier almost always boils down to the relationship: they feel neglected, there’s a lack of trust, there’s a sense of apathy towards your company or service, or they don’t feel a positive human connection.

Empowering Remote Meetings

Many client-facing industries - from advertising and creative agencies to recruiters and consultants - still value the face-to-face meeting above calls or video conferences.

The reason? Chemistry. According to marketing consultancy AAR Group, the chemistry between brands and their agency is still among the top five reasons that a creative agency will win a pitch.

The COVID-19 pandemic has forced even the face-to-face purists to embrace digital and adapt. Many have been surprised to find that they enjoy the experience, thanks to the flexibility that virtual meetings bring, and companies expect online meetings to play a bigger part in their job, even post-pandemic. Job candidates also expect online interviews to become the norm.

Virtual meetings allow for greater automation of

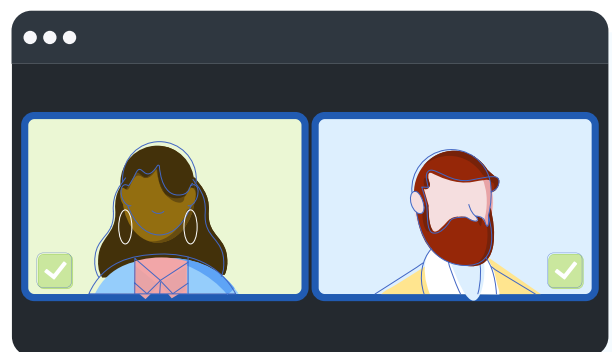
At this point, most organizations ask potential new clients to fill out a form. Eventually, emails and phone calls are volleyed back-and-forth. All while interest gradually dwindles.

Automated scheduling tools allow you to embed bookable calendars directly into your website and landing pages or add links to email and social posts. From there, interested parties can book a meeting or a demo directly, day or night, while their interest is sky-high.

If there’s one way to make clients feel utterly unvalued, it’s to make it impossible for them to find a convenient slot for meetings with you and your team.

Using an automated meeting process enables the creation of custom calendars, whereby you can share your availability with clients and allow them to schedule time whenever they need it. This makes them feel special and removes the scheduling burden from your team.

the entire meeting process thanks to set-and-forget integrations between scheduling tools and meeting software that result in a conferencing link being auto-generated with every meeting scheduled.



Improving Employee Time Management & Engagement

Workplace stress is on the rise, with heavy workloads one of the main contributors. Many companies are educating employees in time management practices and encouraging time blocking, scheduling time for:

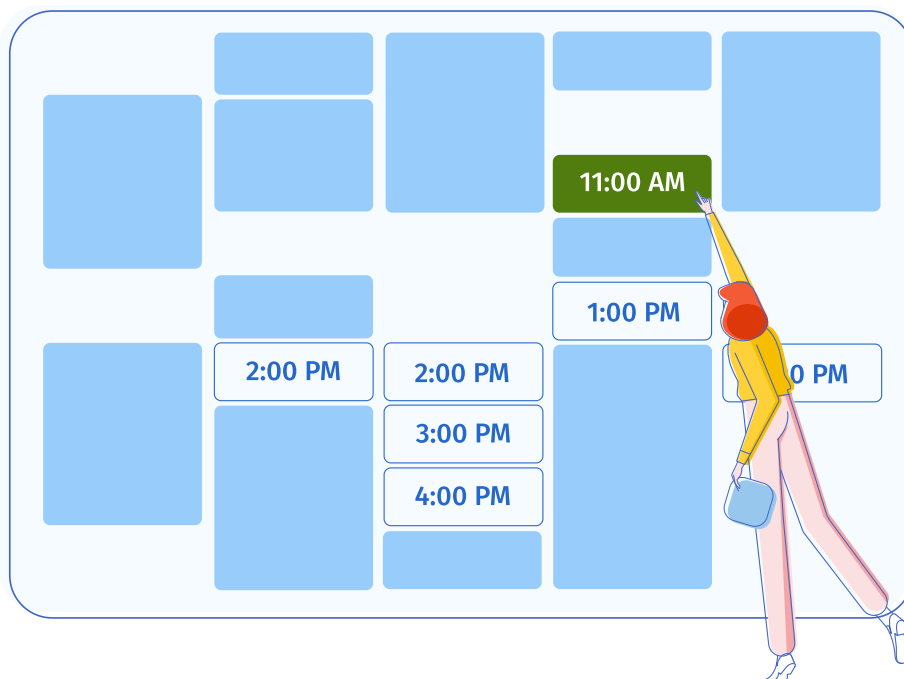
- Networking events
- Solo work
- Pop-up meetings
- Thinking time
- Exercise
- Chatting with colleagues

Automated scheduling is powerful when paired with time blocking.

Client-facing employees can create custom calendars for clients to schedule catch-ups, but only during pre-allocated slots. Integrated meeting AI can learn from and optimize users' habits.

For example, if an account manager blocks an hour each day for a healthy lunch, the AI will preserve that time block in normal circumstances and only use the slot if an urgent client request comes in.

Equally, the AI may learn that you're available in the evening once a week for calls with clients or team members in different time zones.



How to Use Doodle Features to Improve External Meeting Processes

The case for automating your company's meeting processes should now be clear: more seamless scheduling leads to acquiring and retaining more clients. So, where do you begin?

Some automations sync your various calendars into a single dashboard or others provide poll options

Bookable Calendar

A Bookable Calendar is essentially a unique personalized calendar with appointment slots pre-populated according to your predetermined rules. Doodle creates a unique URL for you to share. Anyone with that link can book time in your agenda without any effort on your part, making it a game-changer for client-facing professionals with a high volume of client meetings.

- Assuming you've already synced your Google or Office 365 calendar with Doodle, click on the tab to create a bookable calendar and then name it (e.g., "Client One-on-One" or "New Business Calls").
- Next, create the rules for your schedule. Maybe you only hold client meetings in the morning, while energy levels are high.
- You might want to ask participants a specific question before the actual meeting and use the Custom Questions feature in Bookable Calendar.

to find the best time to meet.

Alternatively, there are options that allow you to send a custom link to a recipient to book time directly into your schedule. Fortunately, Doodle does all of these things and has a few other tricks up its well-scheduled sleeves.

- Finally, you might set the minimum notice period to 24 hours to avoid last-minute bookings or only allow your clients to book meetings one month ahead of time.
- Share the unique URL with your clients. The real beauty of the Bookable Calendar lies in its set-and-forget functionality. Suppose you've created a unique Bookable Calendar for a specific client. They can save that URL and the calendar will automatically update according to your availability, allowing them to book a meeting whenever they need a little TLC.
- Both parties receive a meeting invite with all the details and Doodle no longer shows this time slot as available.
- If something comes up, clients can reschedule the meeting right there from a link in the invite and the revised time automatically resyncs with your calendar and Doodle dashboard.

A Quick Tip!

Create multiple Bookable Calendar links for different purposes and with specific rules to maximize your efficiency and productivity. Here are some examples of customized Bookable Calendar links you can create:

- A calendar to share with all clients, where they can book an unscheduled 25-minute catch-up on Monday, Wednesday and Friday mornings only.
- A calendar for clients to book a 55-minute Zoom deep-dive into the previous month's performance on Tuesday and Thursday mornings.
- A calendar for internal team meetings, with one-hour slots every afternoon between 3 pm and 6 pm.

Doodle 1:1

- Create a 1:1 meeting with a range of possible meeting times and send it to your guest via email or a specific URL.
- Doodle integrates with your calendar and meetings sync automatically, ensuring you're always sharing your real-time availability.
- As guests select their slot, it gets blocked into your schedule and is no longer offered as an option to other invitees to avoid conflicts.

This is a highly effective and efficient process for recruiters who need to schedule a high volume of calls with candidates or agencies who work with a large number of external freelancers and service providers.

It's also instrumental for senior executives to find overlap in their packed calendars.

As the organizer selects the initial time options, the Doodle 1:1 feature is perfect for proposing the best time for an out-of-hours call with colleagues, contributors, experts or clients in different time zones without having to share your entire schedule.

A Quick Tip!

Recruiters can send a Doodle 1:1 invitation to numerous candidates at the same time. This is ideal for discussing a new vacancy.

All invites are generated in just two steps, and each candidate can then choose the most convenient slot.

Doodle Groups

Doodle Groups is one of the most used features because it does away with the endless back-and-forth of emails.

Doodle Groups comes into its own when you're looking to organize things like client pitches, quarterly deep-dives, brainstorming sessions and department gatherings.

What used to take 30 emails and 30 days can now be achieved in minutes.

- Create a group meeting invite with multiple time options for your meeting.
- For group meetings that are particularly challenging to organize, like senior executives or board meetings, organizers can also indicate which existing slots they'd be willing to override in their schedule.

- Send the invitation to all guests.
- Each guest can indicate which slot or slots work for them.
- As guests select their preferred time, other guests can see the most popular options so far, choose one, or reschedule their existing meetings accordingly.
- The organizer can then schedule the meeting for the most convenient time.

Doodle Groups also brings an end to those time-zone headaches. Doodle auto-identifies guests' local time zones and displays options in their local time, which is especially useful for companies with multiple locations or remote employees.

A Quick Tip!

Doodle's AI continuously learns about your organization's meeting habits. Add guests to a Doodle Groups invite and Doodle will suggest the

best time slots to propose, based on when guests are available, their time zones and when they like to take meetings.

Doodle Integrations and Add Ins

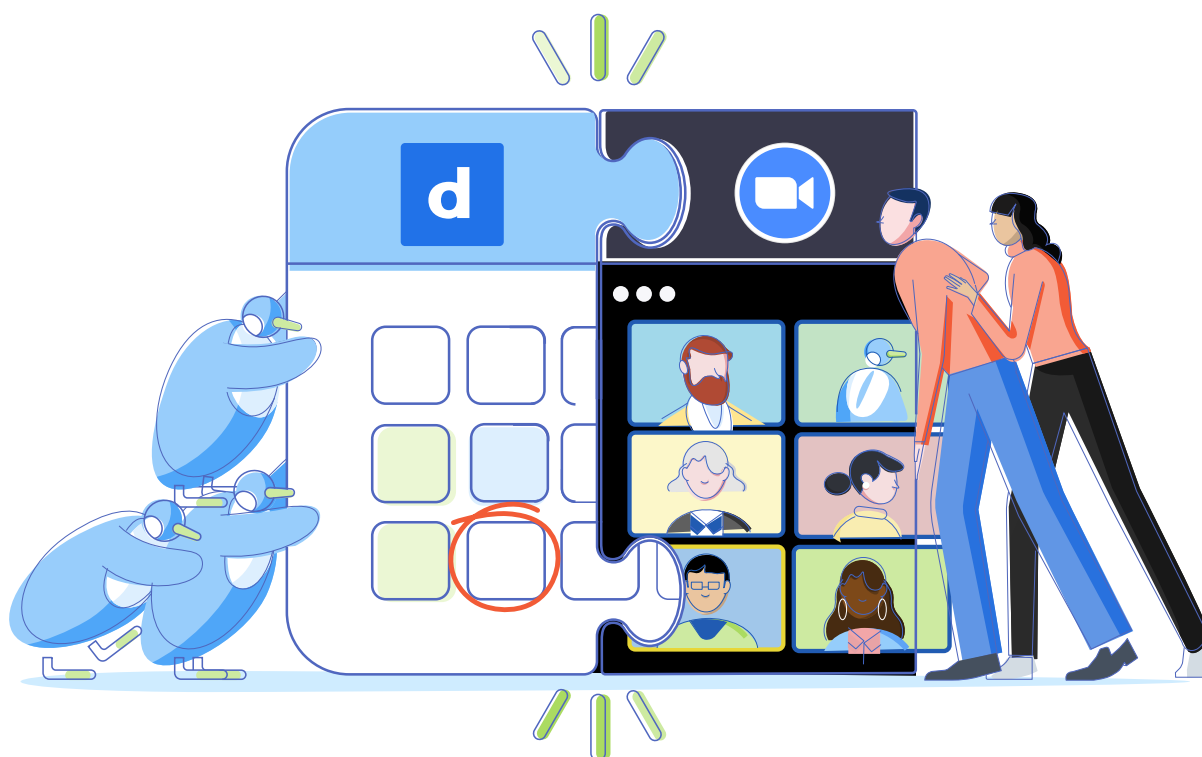
Zoom

With 300 million daily users, chances are Zoom is your company's video conferencing platform of choice.

We've made it even easier for companies to embrace video conferencing via our set-and-forget Zoom integration.

Once your Zoom and Doodle accounts are linked, Doodle auto-generates a Zoom link with every invite you send.

If the meeting gets rescheduled, it is synced with Zoom and appears in both the calendar invite and your Zoom dashboard.



Microsoft Office 365 Add-In

More than one million companies worldwide use Microsoft 365, which is why we created our intelligent add-in giving users access to all the main Doodle features from right there within 365.

- Visit the Microsoft Store and search for Doodle.
- Download the add-in and restart your Microsoft 365.
- Find the Doodle add-in on your ribbon/taskbar, click on it and log in to your Doodle account.
- You can then access your bookable calendar links, get an overview of all of your meetings, schedule 1:1 meetings and send out group meeting invites without ever leaving the 365 environment.

Slack Bot

The collaboration tool of choice for start-ups, tech companies, and creative agencies, there are now around 10 million daily Slack users.

One of Slack's greatest advantages is that users can perform many diverse tasks without leaving the Slack environment, including scheduling meetings via Doodle.

- Download Doodle Bot from the Slack app directory.
- Connect your Slack account to your Doodle account.

A Quick Tip!

A few power tips you can use to become a scheduling expert with the Doodle Bot in Slack:

1. Type `/doodle signup`` into the message box anywhere in Slack, then click Enter to connect your Slack workspace and your Doodle account.
2. Type `/doodle list`` into the message box anywhere in Slack, then click Enter to see

- Using the apps link on the sidebar, the lightning bolt shortcut button or the shortcuts menu, you can now access all the functionalities of Doodle from directly within Slack.
- Create time options for a meeting and choose the participants to invite. If guests connect to your Slack workspace, they will receive the notification and time options in Slack. Other guests will receive the clickable options as an email.
- Finally, you can also see the most popular time options without leaving the Slack environment.

your list of Doodle Group invites. You'll be able to find polls you've created and those you've been invited to participate in.

3. Type `/doodle help`` into the message box anywhere in Slack, then click Enter to submit the command and get helpful tips and a one-minute walkthrough video.

Zapier

If you'd like to take meeting automation to the next level, Zapier is the ideal tool, allowing you to create custom recipes that integrate Doodle with more than 3,000 other apps and tools.

For example, you could automate an SMS with the time and date to be sent to participants when a meeting is scheduled via Doodle. Or have all your Doodles logged on a Google Sheets so that you can analyze meeting data and patterns at a later date.

- Log in to or create a Zapier account.
- From the top menu, navigate to 'Connected Accounts.'
- Click on 'Connect new account' and search for 'Doodle.'

- Connect your Doodle account to Zapier.
- Start automating. Use pre-made Zaps (recipes) or create your own with the Zap Editor.



How Companies Are Using Doodle to Automate Their Meeting Processes

Motivate LLC

As a rapidly scaling bike repair startup that employs numerous staff on both a permanent and an hourly basis, Motivate LLC has complex scheduling needs. Doodle helps Motivate LLC to meet them, seamlessly.

Motivate LLC designs and deploys bike-sharing systems, and they're hands-on at every step of the process. That means they employ staff in a range of positions, from salaried to hourly on-the-ground employees.

Because hourly employees aren't issued with Motivate LLC email addresses and thus are outside their calendar network, their HR team needs a scheduling system that ensures everyone, internal or external, can take part in key events. That's where Doodle comes in.

Motivate LLC uses Doodle to schedule manager training and onboarding for new employees. They found it easy to create multiple meeting invitations for the various sessions, send them out to each

team member and allow them to sign up for the ones that suit them.

Once completed the guests would receive a calendar invite for the meeting they chose. Doodle lets busy professionals get any size group together in moments - reducing administrative work to zero.

A growing, transitioning company poses unique challenges for HR professionals. Doodle's streamlined scheduling has helped Motivate LLC with their mission to nurture corporate culture and facilitate ongoing professional development in a dynamic start-up environment.

Doodle group polls make gathering large groups for updates and events easier than ever. Doodle 1:1 makes scheduling multiple training or feedback sessions a breeze. And, thanks to Doodle's Bookable Calendar, everyone - from the CEO down - can make themselves available to others, according to their preferences. Scaling up can be a challenge, but with Doodle, scheduling is always simple.



Conclusion

How do you schedule meetings in your company? It sounds like a fairly innocuous question but, having now dived headfirst into the subject of scheduling, you may find the answer is not as simple as it first seemed.

How much time do you spend each month scheduling meetings? How many times have you thrown your hands in the air, faced with the impossible task of finding a convenient slot in everyone's agenda for a crucial client meeting? How often have you spent a substantial slice of your day organizing a meeting only to have the client cancel at the last minute, meaning the whole process has to start again?

In most organizations, scheduling is a complex web of inefficiency. Emails and invites bounce back-and-forth. The never-ending game of executive Calendar Tetris drains employees' energy reserves. Clients become disillusioned by companies that can never seem to find time for calls or meetings. It's time we recognize our strengths and weaknesses as humans. Recruiters, account

About Doodle

Doodle is the leading enterprise scheduling technology helping the world's largest brands and universities instantly set meetings with clients, colleagues and teams.

Tapping into the unique nature of smart scheduling with AI and chatbots, Doodle simplifies the planning of 1:1 and group meetings for professionals.

Contact Us

To learn how Doodle can help you get meetings scheduled quickly and effortlessly, contact our sales team for a product demonstration.

managers, financial advisors, client services directors and salespeople should be freed up to focus on building personal connections and truly understanding clients' needs. They should be networking, creating new business and maintaining existing business. They should be engaged in tasks that drive value for clients. None of them should be forced into a vicious cycle of scheduling meetings.

Quality software can take on many manual, repeatable tasks in companies, such as scheduling. What's more, technology can perform these tasks more efficiently and inexpensively, freeing up time for your employees to do more nuanced, creative and essential work. In industries defined by high volumes of meetings, the ROI of time-saving, client-pleasing scheduling software is evident.

Automating your meeting processes supports employees to be more efficient, more productive and, most importantly, improving the overall client experience could be a game-changer.

Doodle has more than 30 million monthly active users as the world's most trusted online scheduling platform.

Part of the Swiss media group TX Group, Doodle AG is headquartered in Zurich, with offices in Berlin, Atlanta, New York City and Belgrade.

If you would like to test out Doodle before committing long-term, you can get started with a 14-day trial.

