

Calendly

- Setting up Calendly
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- Create Regular Appointments That are Always Available

Ministry leaders often find themselves behind screens far more often than they should. Face time spent with people over coffee, breakfast or lunch is something that should be prioritized. However, figuring out who to meet with and when can become an administrative nightmare, unless you use a tool like Calendly. Consider a tool like Calendly and give your staff, volunteers, and families the gift of you.

Setting Calendly Up

- Go to Calendly and set up an account (the integration with your google account is seamless), ideally through your gmail or google apps account
- Select your calendly link (calendly.com/_____) and set your time zone
- Your dashboard will load with a prompt for the “Quick Start” guide
- Step 1: Connect your calendar by clicking the link, “manage your calendar settings”
 - Choose the calendar calendly checks for conflicts
 - You can sync across multiple sub-calendars to create your calendly availability
 - Choose your calendar calendly adds new events to (this can be your primary calendar or any of your sub-calendars)
 - Save and return to the quick start menu
- Step 2: Set your availability by creating meeting types
 - Calendly by default gives you three one on one meeting types (a 15, 30 and 60 minute meeting) although you can also create group meeting types where multiple people can sign up for the same meeting
 - The free version of calendly only lets you use one meeting type at a time
 - Click on the event you want to work with
 - Click “What event is this” to edit the event name, location, description and the event link
 - Click “When when can people book this event?” to edit your availability
 - Select the duration of the appointment
 - By default, people can select appointments over 60 rolling days - but you can change this in the settings
 - Confirm your local timezone for your appointmentents (people in different time zones will see their local timezone when reserving an appointment)
 - Select your availability
 - Create availability on the calendar, you can actually create multiple intervals in one day and apply availability to multiple days.
 - Check out the advanced features to set up time buffers before and after appointments or even select max number of appointments that can be booked each day

- Click “Invitee Questions” to gather the information you need for the appointment (I always add the questions, “What do you want to talk about?”)
- Click “Notifications and Cancellation Policy” to set up text and email reminders
- Step 3: Begin sharing the link to your event so people can make appointments

Bulk Appointments in Limited Time

This isn't something that has to be done regularly, but often enough that it's good to have a tool to make the process seamless. Perhaps you have multiple candidates you're hoping to interview over a period of a few days. Create several appointments with an interview event (probably with 60, 90 or 120 minute durations) and share with all the candidates letting them pick times that work with their schedule. This may require you to clear your personal calendar until the candidates select their availability. Perhaps you need to schedule a dozen or so baptism interviews after a camp or Vacation Bible School. You can create dozens of opportunities over a week or two for families to pick what times work for them. Perhaps you want to reconnect with all of your small group leaders before school starts in the Fall. You can create availability every week over the summer to meet with anyone who is available

Create Regular Appointments That are Always Available

Create space in your calendar where you're available to meet with people when they want to connect with you. Maybe you have a couple hours on Monday evenings two times a month and a few hours after lunch every Thursday. Make these opportunities available and share the link to this event with families or volunteers on a regular basis. Give the people you lead greater access to you, but within a time-frame that works with your weekly routine.