



LANCE C. GREENBERG

# Google Calendar Privacy Update SOP

## Context:

On May 11, 2023 Google Announced a Privacy Update to mitigate Scammers and calendar spammers.

By default, when a calendar invite is sent, it is no longer autonomously added to the person's calendar. It sends an email to the individual who booked a call that says invitation from an unknown sender. When they open that email it shows an option that a person has to click and confirm if “I know this sender” or “report as spam”

## How it works:

1. When somebody books a call it does not get added to the person's calendar anymore.
2. They get an email notification that says invitation from an unknown sender
  - a. When you click the email notification
  - b. There is an option there to confirm whether “I know the sender” or “report as spam”

- c. If they do not click “I know the sender” the calendar event will not show up on their google calendar.

**Solution:**

- Send an Engagement Bait Email to get a Response from the lead.
  - If you as the person sending the calendar invite have any past interactions with the person receiving the calendar invite, it will still be added to their account by default to them saying yes.
  - \* ONLY IF there is past interaction between you and the person that is receiving the calendar invite.
  - Google has a feature called Google Contacts, that’s how Google knows who’s had past interaction with one another (ex. I emailed you, you responded back. Then we’re on each other's google contact)

**Step 1: Setup in Zapier**

1. Create trigger: Invitee created in Calendly
2. Create Action: Filter (only continue if)
  - a. Only continue IF “text matches” (insert calendly event name)
    - i. If your calendly account uses other events that are actively used, then you'll need to set up a filter to only run the following action steps if the text in the event matches the calendly event you want to set up this specific Zapier for.
3. For Sales Teams of more than 1 person:
  - a. Create Action: Paths

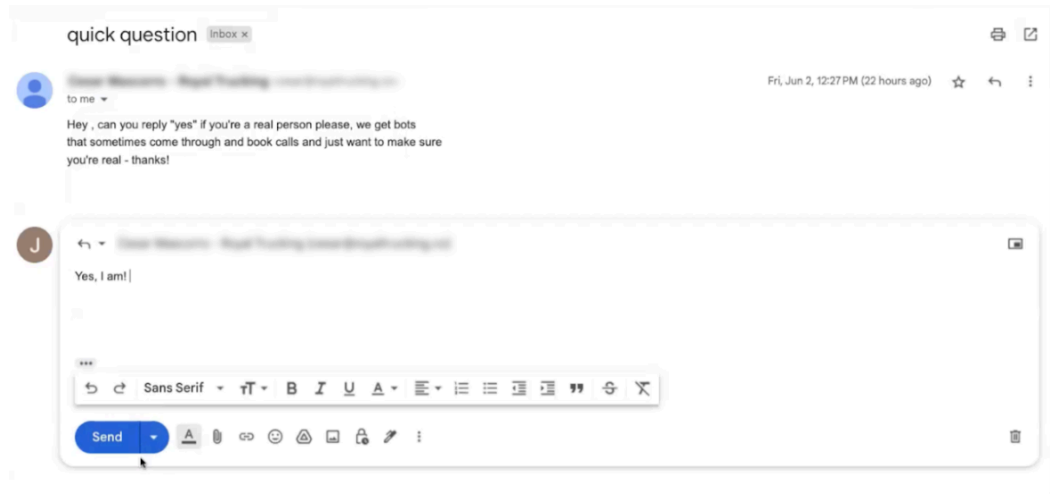
- i. Setup a different path for each sales person.
  - 1. IF “Event Assigned To” > text contains > (Sales Rep 1)
  - 2. IF “Event Assigned To” > text contains > (Sales Rep 2)
  - 3. Etc..
- ii. This will need to be done for each new sales person.
  - 1. setup the first path completely,
  - 2. duplicate it, and go into the 2nd one and finish the setup inside of the 2nd one. (this will help speed things up a bit)

**4. Create Action: Send Email in Gmail (the engagement bait email)**

- a. In the “account” section, you’ll need to login to the specific sales person’s Account that you’re setting this up for.
  - i. \*\* They will need to give their login info and do 2 Factor Authentication for this to work, so all reps will need to be available for this step.

b. Sample of email:

The screenshot shows a configuration window titled "8. Path rules". It has a "Name" field with a green checkmark. Below it is a "Rules setup & testing" section, also with a green checkmark. This section contains a message: "Your path **would** have continued. If this was unexpected, edit your rules below & retest. [Learn more.](#)" and a "SAMPLE DATA" section showing "Created: 2023-06-02 13:32:22". Below this is a "Only continue if..." section with a rule: "1. Event Assigned To" followed by "(Text) Contains" and a blurred text field. There are "+ And" and "+ Or" buttons below the rule. At the bottom are "Retest filter" and "Continue" buttons. A "Close" button is at the very bottom.



- i. Keep in mind that we still want to keep the initial calendar invitation on because not everyone is using Gmail for their calendar, and will still receive the event on their calendar as normal.
  1. \*\* This also benefits the sales rep by getting the lead in contact with them.

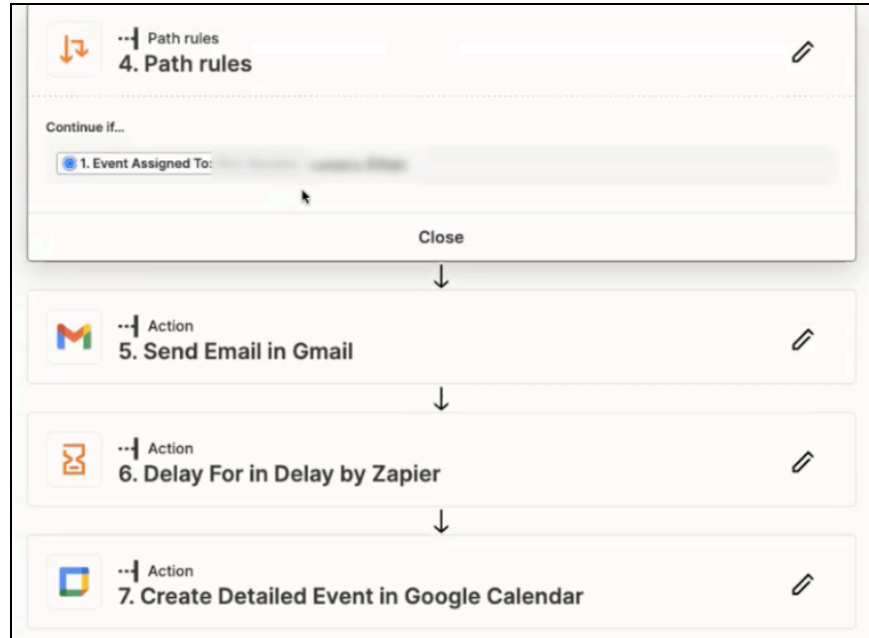
**5. Create Action: "Delay For 45 mins" in Delay by Zapier**

- a. 45 min delay

**6. Create Action: Create Detailed Events in Google Calendar**

- a. Create a new calendar invite that gets sent to the person.

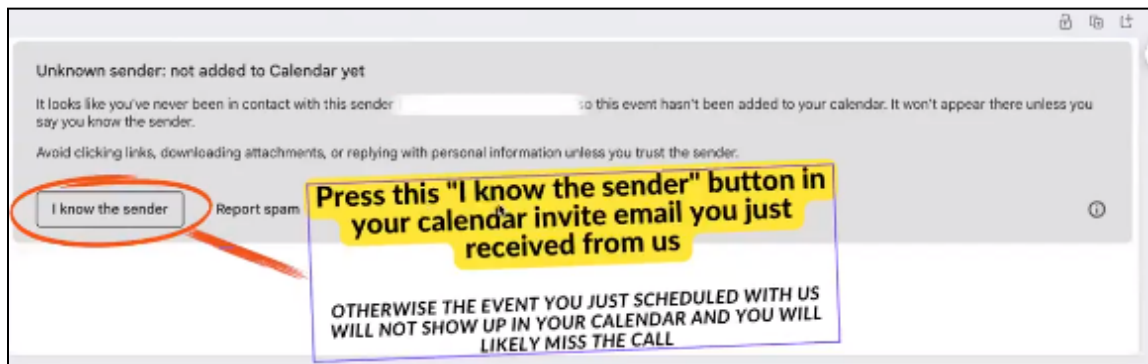
Here's what it looks like in Zapier:



## Step 2: Add a custom image to the booking confirmation page

### Confirmation Page

1. Follow this [Google Privacy Confirmation Image SOP](#) to create the Image: (created in Canva)
  - a. Create for both mobile & desktop:





2. Add it to the confirmation page above the fold and make it VERY clear and noticeable.
3. Add this image to confirmation emails that go out via your CRM when people book a call.
  - a. You want to add both the mobile and desktop images here and say something like:
    - i. “Here’s what this will look like if you’re on mobile, and just in case you’re on desktop, here’s an image of what it will look like on desktop”
  - b. \*\*\* Do not add the image to the scheduling software.
    - i. It’s best to keep these clean.

4. The sales team may also want to use this for manual texting out to people who book with you.