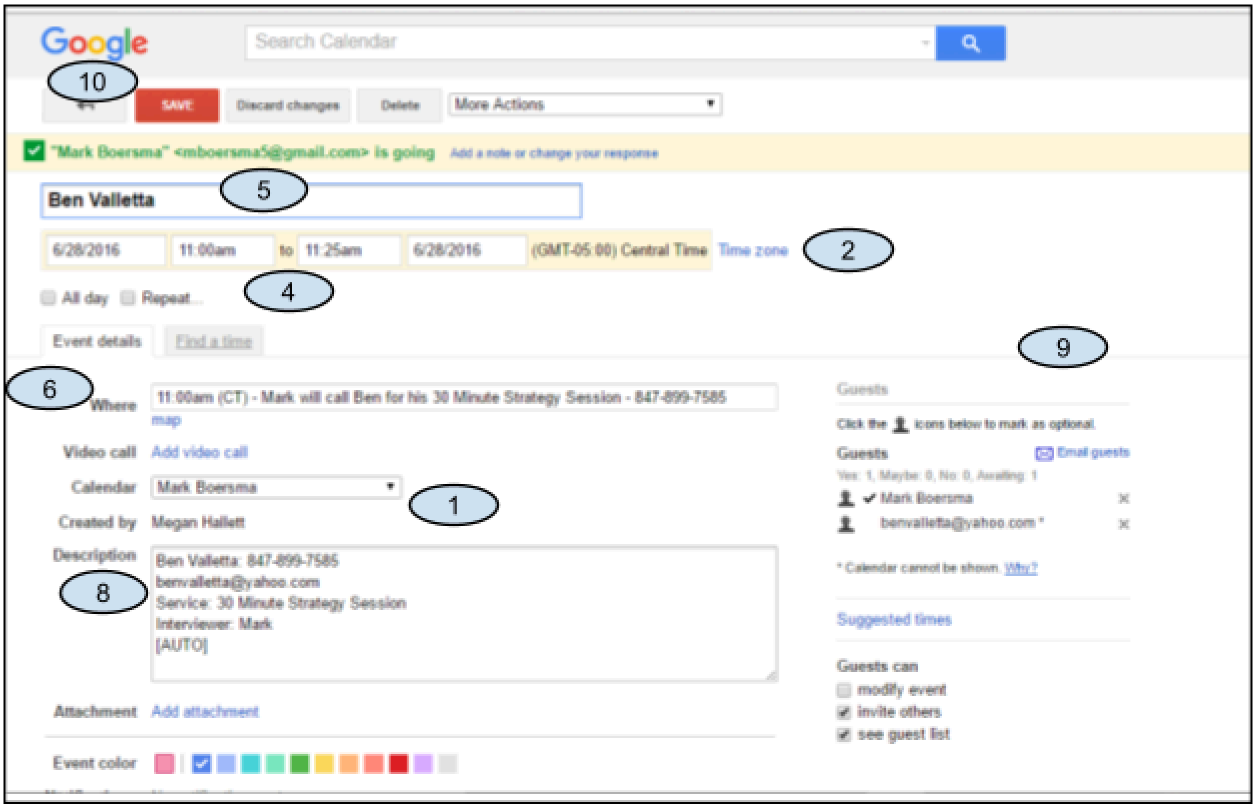
Setting Calendar Appointment
(Checklist) ~ Version 4.02

- [ALL Document](#) -

[- Area 2: Pre-Sales System -](#)

- [Phone Calling System (With Emails) -](#)
[~ Checklist when doing a 30 MSS app and follow up](#)



Steps to setting a Calendar Appointment…

- ❏ (1) Know which Calendar you are going to be using to set appointment!

  *Be very careful with this because it is easy to make a mistake and mess up a person's calendar and appointments.

- ❏ (2) Figure out Time Zone:

  *When a lead or prospect wants a 30 minute strategy session first thing to make sure is you knowing what [time zone](#) they are in so you can properly set the appointment. ALWAYS put in the "Where" their time zone so everyone knows you checked. This is true even if it's the same time zone as you / Mark is. ALWAYS!

- ❏ (3) Make sure you are not booking an appointment at a time that already has another event planned during that time!
- ❏ (4) Choose the time the prospect wants and adjust the duration of the time from 30 minutes to 1 hour.

*The time slot is defaulted to one hour, so unless instructed otherwise schedule only a 30 minute appointment. For Mark, if possible leave 30 minutes between each apt. If not possible then it's alright.

❏ (5) In the "Title of Event" text box put the name of the prospect or lead that you are making the appointment for. Make sure that it's the same exact spelling as in MCAT. Watch for Dan vs. Daniel as totally different names / people in MCAT.

❏ (6) In the "Where" text box, put the time that the person who will be performing the appointment should call the prospect along with the best phone number to reach them.

*For example: If I am making an appointment for Mark to talk to a client in Eastern time at 2:30 CST I will put in the "where" text box: 3:30 (et) Mark will call Joe at: xxx-xxx-xxxx for 30 minute Strategy Session

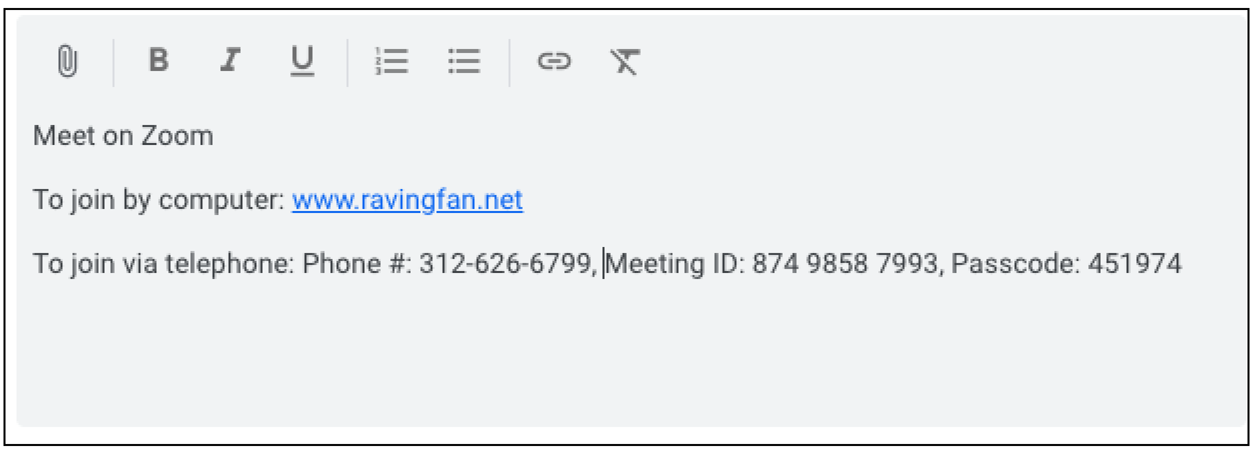
❏ (7) Where it says Calendar, in the drop down box you want to choose the calendar that you want the appointment to display on.

*So if I am scheduling an appointment for Mark, I want to make sure I choose his calendar, so that appointment I am setting displays on his calendar.

❏ (8) In the Description box you want to be very detailed but brief. See example below.

  ❏ **MUST HAVE:** Link to Zoom - www.ravingfan.net We should also include the phone number, meeting ID and passcode if they prefer to call into zoom.

  ❏ **MUST HAVE: Info to join zoom via telephone:** Phone #: 312-626-6799, Meeting ID: 874 9858 7993, Passcode: 451974



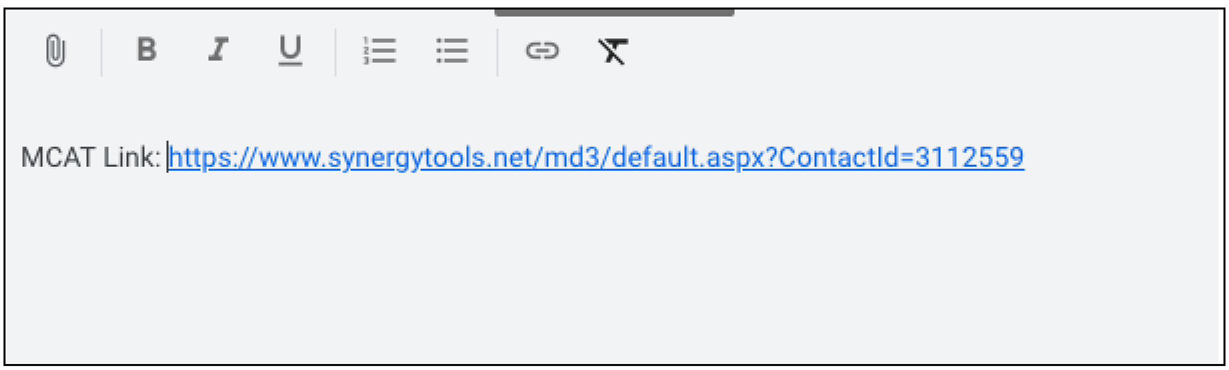
❏ (9) In the "Add Guests" section, you want to add the lead/clients email so that they have a record of the appointment. And anybody that should be included in the appointment as well.

*If you are setting the appointment, and plan to attend, please make sure that you put your own email in there and that you make sure it is clear as to where the call is to be made.

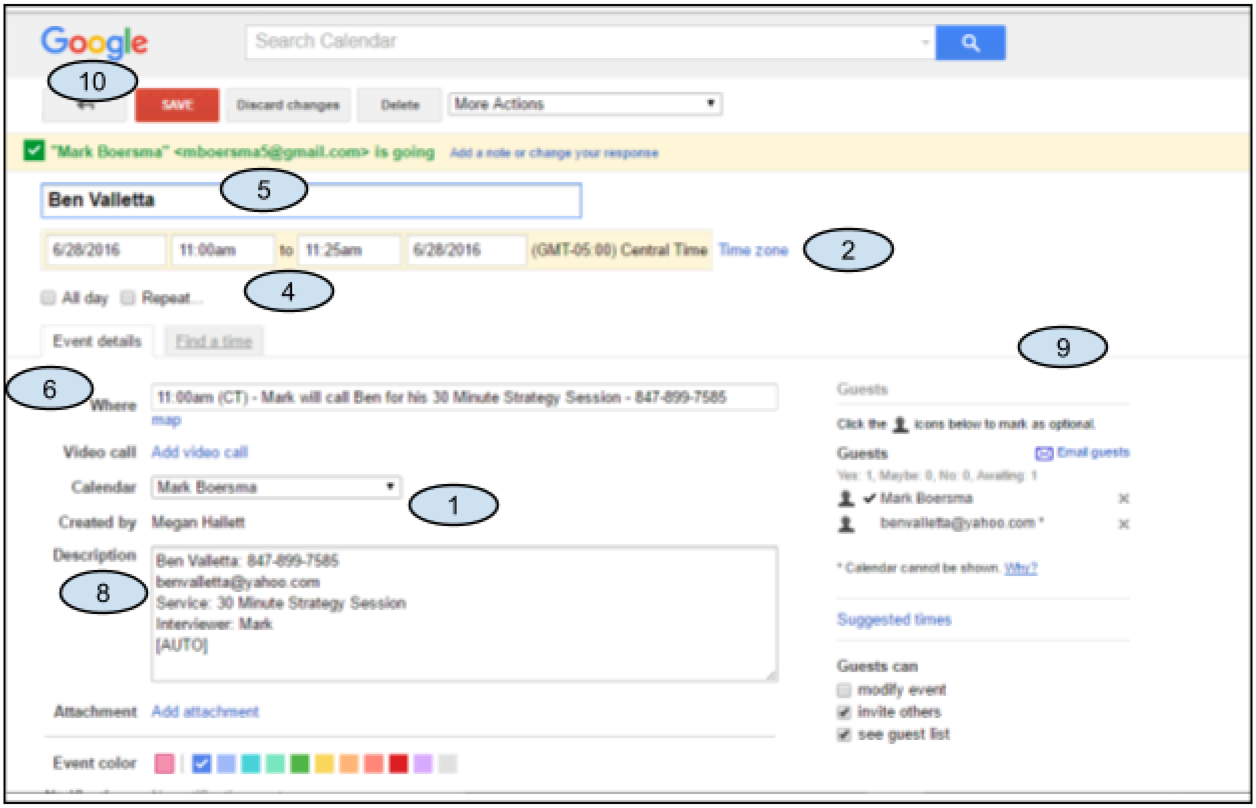
❏ (10) Then click "Save"

Next we need to set an [INFO] appointment for the same date and time as the appointment you just set for the lead.

- ❑ (1) Double click on the same day of the original appointment you set and set the time for the EXACT same time of the lead appointment that you scheduled.
- ❑ (2) In the "Title of Event" text box put [INFO] and Lead's Name
- ❑ (3) In the Description box you want to add any links that Mark or the person you are setting the appointment for might need (see example below):
  - ❑ MCAT Account link - you access this link by searching for the lead in MCAT, clicking **View** next to the leads name (before opening up their record) and copying the URL in the window that opens, and then paste that URL into the Description box of the [INFO] Event.
  - ❑ Any links to lead info or important information from spreadsheet.



- ❑ (4) Click "save".



Steps to setting an Interview in the Calendar:

- ❏ (1) Know which Calendar you are going to be using to set an appointment!

  *Be very careful with this because it is easy to make a mistake and mess up a person's calendar and appointments.

- ❏ (2) Figure out Time Zone:

  *When an interview is set, the time zone should reflect the interviewer's time zone. ALWAYS put in the "Where" the time zone of the interviewee so everyone knows you checked.

- ❏ (3) Make sure you are not booking an appointment at a time that already has another event planned during that time!
- ❏ (4) Choose the time the interviewee wants and adjust the duration of the time of 30 minutes.

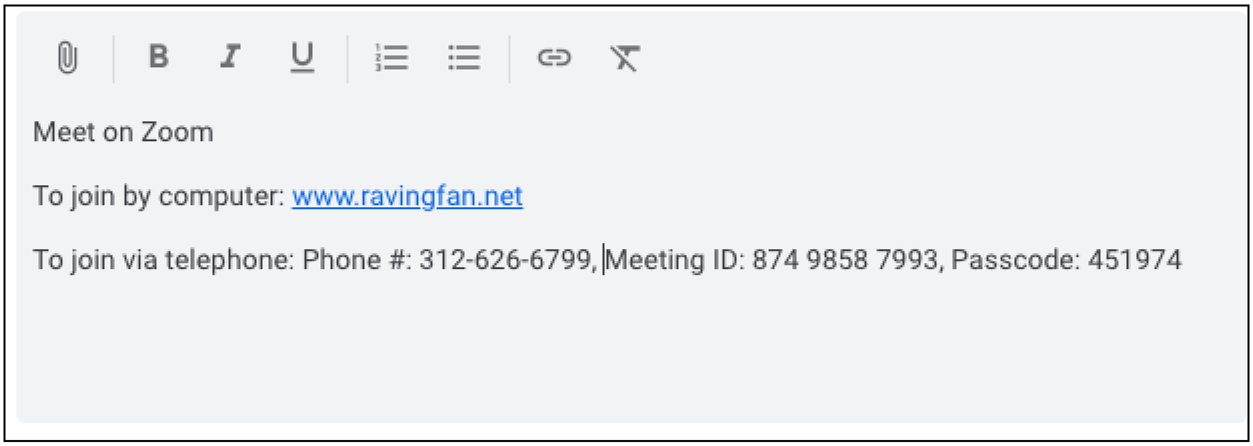
  *The time slot is defaulted to one hour, so unless instructed otherwise schedule only a 30 minute appointment.

- ❏ (5) In the "Title of Event" text box put the name of the interviewer and the name of the business they are interviewing for. Make sure that it's the same exact spelling as in MCAT.
- ❏ (6) In the "Where" text box, put the time zone of the appointment for the interviewee and how we are conducting the interview (ie. Meet on Zoom or Mark to call (insert name).

- ❑ (7) Where it says Calendar, in the drop down box you want to choose the calendar that you want the appointment to display on.

  *So if I am scheduling an appointment for Mark, I want to make sure I choose his calendar, so that appointment I am setting displays on his calendar.

- ❑ (8) In the Description box you want to be very detailed but brief. See example below.
  - ❑ **MUST HAVE:** Link to Zoom - www.ravingfan.net We should also include the phone number, meeting ID and passcode if they prefer to call into zoom.
  - ❑ **MUST HAVE: Info to join zoom via telephone:** Phone #: 312-626-6799, Meeting ID: 874 9858 7993, Passcode: 451974



- ❑ (9) In the "Add Guests" section, you want to add the interviewee/clients email so that they have a record of the appointment. And, anybody that should be included in the appointment as well- AV Coach or their EVA are all options.

  *If you are setting the appointment, and plan to attend, please make sure that you put your own email in there and that you make sure it is clear as to where the call is to be made.

- ❑ (10) Then click "Save"

Next we need to set an [INFO] appointment for the same date and time as the appointment you just set for the lead.

- ❑ (1) Double click on the same day of the original appointment you set and set the time for the EXACT same time of the lead appointment that you scheduled.
- ❑ (2) In the "Title of Event" text box put [INFO] and Interviewee's Name - Name of Business they are applying at.
- ❑ (3) In the Description box you want to add any links that Mark or the person you are setting the appointment for might need (see example below):
  - ❑ **MUST HAVE:** MCAT Account link - you access this link by searching for the lead in MCAT, clicking View next to the leads name (before opening up their record)

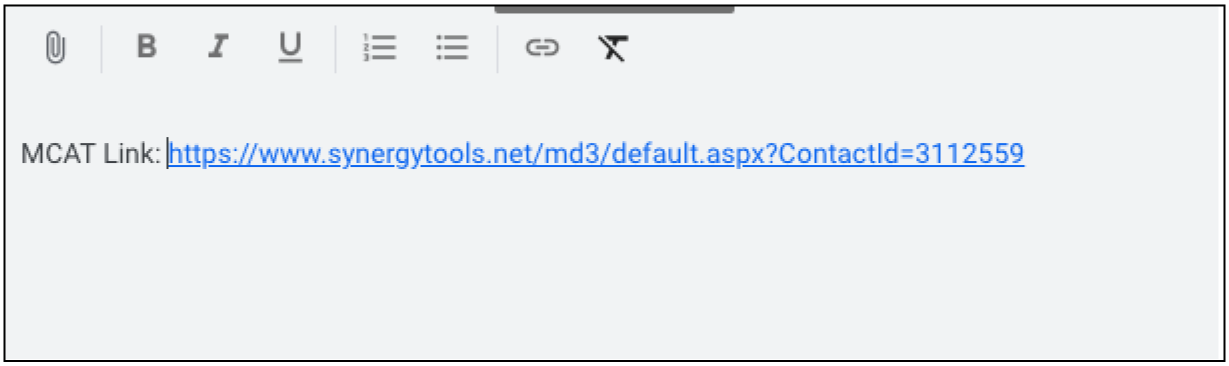
and copying the URL in the window that opens, and then paste that URL into the Description box of the [INFO] Event.

❑ **MUST HAVE: Link to their 3 minute and/or 11 minute survey if applicable.**

❑ **MUST HAVE: Name of position they applied for and the company.**

❑ **MUST HAVE: Important questions to ask - ie. is there a particular software the business owner wants them to know how to use? If so, how many years of experience in this software?**

❑ **If applicable: Link to or attached file of resume.**



❑ (4) Click “save”.

**** DO NOT USE **** OLD SYSTEM

❑ Client Phone Number (Ex: Jane Smith: xxx-xxx-xxxx) Please try to get a cell phone number as we will be sending a text message to this number.

❑ **MUST HAVE:** Client email address

❑ **MUST HAVE:** Interviewer: (Name of who the appointment is with. . . Mark, Angel . . .) * This will trigger the reminder email to say, Reminder of your appointment with Mark at 3 pm. If you do not put this in, the email will read, reminder of your appointment with at 3 pm. So this, must be in the description.

❑ Optional - Service: 30 minute Strategy Session, Business Xray Interview. * If put in, this will put the description of the appointment in the reminder email. If you do not put this in, it will just remind of the appointment.

❑ **<u>MUST HAVE:</u>** [AUTO]

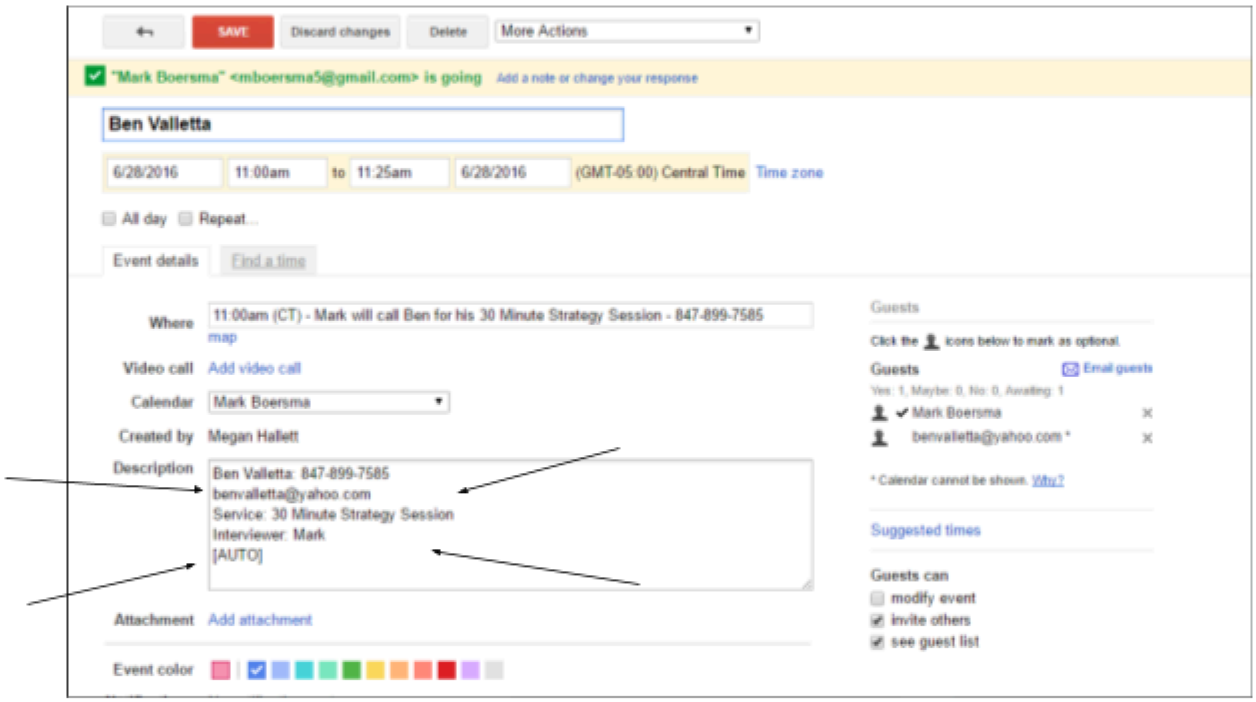
**This is VERY important and this one phrase will trigger a reminder email and text message to go out to this person for them to confirm their appointment.

This needs to be in every non-recurring appointment (30 min strategy sessions, Business Xray Interviews, Business Xray Reviews...)

- ❑ **<u>Optional:</u>** Biggest Challenge and Love Help on.

  Ex: Biggest Challenge: Not enough time

  Love help on: Getting more leads



- ❑ (9) In the "Add Guests" section, you want to add the lead/clients email so that they have a record of the appointment. And anybody that should be included in the appointment as well.

*If you are setting the appointment, and plan to attend, please make sure that you put your own email in there and that you make sure it is clear as to where the call is to be made. If person doing the 30 minute will conference you in, MAKE SURE that they have the ability and know they need to conference call you and AND that you call the leader of the 30 minute 1 minute before the call.

- ❑ (10) Then click "Save"

Important Notes while setting up Strategy Sessions and Appointments...

- ❑ Send the prospects/leads the email confirmation for the Strategy Sessions, so the 30 minutes session can be more efficient and beneficial for both persons.

  * <u>Email Confirmation of appointment</u>

- ❑ Please change 30 Minute Strategy Sessions to BLUE on the calendar.
- ❑ Make sure lead is set up in MCAT BEFORE the appointment!!

  * <u>Checklist for creating MCAT record</u>

- ❏ If you are setting an appointment for the same day that you talked to the prospect then you need to call/email the person who is conducting the appointment so that they are aware of a schedule change for the day.

    * Google Calendar <u>does not</u> automatically refresh, so if you schedule an appointment for the same day you need to let the person know that you added an appointment for them later on that day! ...Very IMPORTANT!

- ❏ Your calendar always shows in YOUR time zone!!

Owners / C-Level Executive

Calendar Management

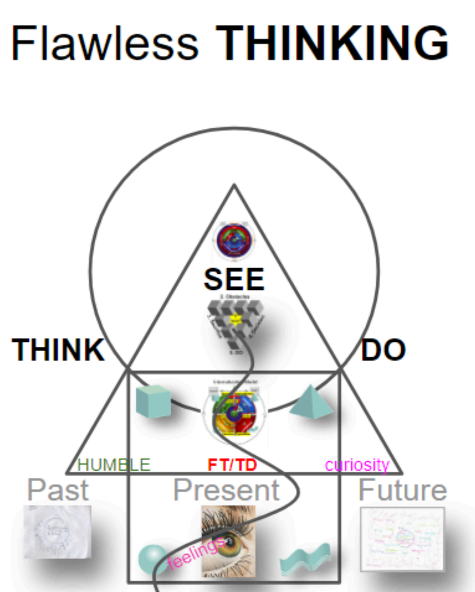
Setting an appointment, seems like it should be a pretty easy thing … but as you have learned from the above, it's not. It's easy to make a mistake and that mistake can be costly and we may never know the full cost of the mistakes as we would never get a bill for a lost sale / miss opportunity if we did something as simple as made a mistake in the time zone.

With a "C" which is "Chief" or top level executive like a CEO ~ Chief Executive Officer, CFO ~ Chief Financial Officer, CTO ~ Chief Technology Officer, CMO ~ Chief Marketing Officer to name a few the costs are even higher. The higher you go in an organization the greater the costs for the mistakes.

If an Owner / C-Level Executive has given you the responsibility of managing his/her calendar, that says a lot about how much they trust and value you. Each C-Level Executive will want their calendar managed in a different way and if they haven't had someone manage their calendar in the past, they may not even know precisely how they would like it managed. It will take some time usually to learn to "dance" together. In the C-Level world things are often not black and white which makes it more challenging to manage their calendar.

Here are some common things the C-Level executive will value. Ask them to organize what their priorities are from top priority as #1 to less important.

- ❏ **1. ROI On Time & $**
- ❏ **2. Meet With Best People**
- ❏ **3. Save / LEVERAGE Time**
- ❏ **4. Follow Up On Appointments / Tasks**
- ❏ **5. Insure Appointments Stick**



- ❑ **6. Connector ~ Get Others Involved**
- ❑ **7. Dish To Others**

C-Level executives … well … how do we say this nicely … "They think a bit differently than other people." :-) This is how they advanced to this level of success professionally. They generally think far faster and about more things and learn to prioritize things in a way that at times … seems more like a machine than a human being.

To succeed in this role … one really needs to master the Flawless Thinking Model … which is honestly far more of a journey than a destination.
If you are an owner / C-Level Executive, reading this document and it's resonating with you as to how you would like someone trained at this level to manage your calendar … plug in and help you as you sense this person can do talk with your **Action**VISION lead coach / mentor about contracting with E-VA's.

Tom Kunz, past President of the largest real estate franchise in the world, was in special forces in the Army. Anyone who served our country in the military … well … we owe our ability to be owners / C-Level to them! Anyone in special ops in any of the branches of the military are an entire level of thinking / mindset.

Tom … once shared … "Being in special forces in the Army was a special honor and helped me to succeed in business. I am grateful to everyone in the military for their service and my special ops buddies in all branches of the military are, well, a different breed of person in how they think. I have to say though … the Navy Seals, those individuals … they are insane … and we as a country are blessed to have them. The stories I could tell … they are the best of the best and I have the utmost respect for them. In business … I have to be honest, the E-VA's who are trained and certified through Life Masteries Institute are like Navy Seals. The mental training and mindset they go through … well … let's say it some would look at it as being abusive. I have never seen an employee with the mindset of an E-VA. They are an Owner's / C-Level Executives best friend. They are trained killing machines of tasks, projects and things that no one else can get done. E-VA's get things done!"

> https://eva.dnaforsuccess.com/eva-plan-options

Talk with your **Action**VISION lead coach / mentor to determine if you are ready for an E-VA team and what level would be best for you to start with.

As an E-VA who manages an Owners / C-Level Executive's calendar you are like the neck which controls the head and where they look and what they see. To do this you have to learn to think in a very different way than a normal person and you must have the most magical team around you.

Owners / C-Level of individuals … these levels of women and men are indeed "the precious few" they really are.
> https://www.youtube.com/watch?v=rR-hZv_m1VE&t=176s

It seems that to succeed as an Owner / C-Level Executive, one needs to be the person that … "Something obsesses them. Something that if they can't do it, it's going to drive them clean out of their mind."

Classic line from the movie Ford vs. Ferrari.

When I was 10 years old, pop said to me, "Son, it's a truly lucky man who knows what he wants to do in this world 'cause that man will never work a day in his life."

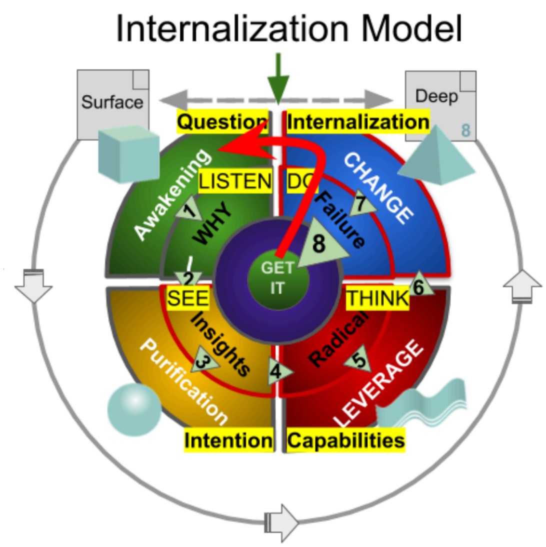
But there are a few, a precious few -- and hell, I don't know if they're lucky or not -- but there are a few people who find something they have to do. Something obsesses them. Something that if they can't do it, it's going to drive them clean out of their mind.

People around the Owner / C-Level executive know there is something very different about this person, and often joke about the person … but a few, a precious few … understand how uniquely different these types of individuals are.

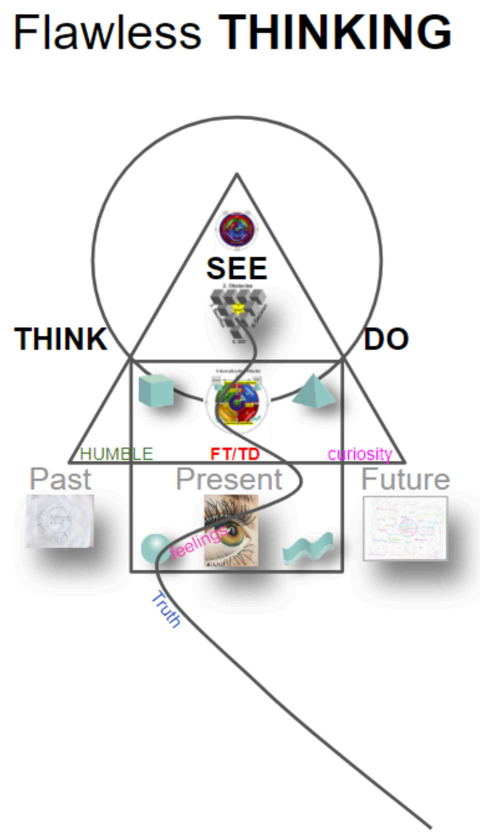
To really manage their calendar you need to get inside their heads … and honestly … that is a frightening place to be. :-) Most would say you are insane for even accepting the invite to do this … but the rewards are, well honestly, out of this world. They really are.

These men and women, honestly are a bit insane, they really are and without question there are different levels of insanity and for those who have personally met Mark Boersma, some would say, well … he is the most insane of the insane. His life vision, what he is obsessed about … no normal person would think it's possible to achieve this in his lifetime.

Getting inside the head of the owner / C-Level is key to the success you will see in managing his / her calendar. Do not understatement how challenging and rewarding this will be. For Mark, check out the book / video ~ [click here] ~ and it will give you a peak into his world. One of the first things you learned in E-VA training is the Internalization Model. It's the ability to feel things that most human beings do not feel and to do that one needs to SEE the world in a very different way.



To "understand" / apply in a deep manner the "Internalization Model" one needs to understand Tom Kunz's 5 Steps To Success model and to understand the Quantum Thinking model.



To deeply understand all these things we need to be self aware and "come to terms" with the "Past" … "Present" and the "Future."

The more we understand about the "Flawless Thinking Model" the more we understand the last we know.

Oh … if you ever become overwhelmed by the mind of a Owner / C-Level Executive … and/or get frustrated with that person and think … "I hate being around ___________." Just remember … if you think it's tough being around the person … just imagine … if you were that person. SEE … they are with themselves 24/7 and most people are so selfish and self-centered, most people lack so much self-awareness that their minds, hearts and souls are often not able to keep up with this type of person.

YOU'LL DO GREAT!!! IT WILL BE FUN!!!

Now … let's get into the details. :-)

The 7 Keys to managing the C-Level's calendar is both an art and a science. There could be books written on each item and hundreds of hours of training.

If you are feeling anxiety and stress … great! You should be. Don't worry though, it's good anxiety and stress. :-) Everyday you do this, you'll get better and better. Every day you'll make mistakes, miss something … and it's alright … but it's not. :-) As long as you are harder on yourself than the C-Level executive and/or the reality of the marketplace, you'll do just fine. :-)

Initially look at yourself as a craftsman where you are taking your 7 T's and blending them with the 7 T's of the C-Level executive you are partnering with together you'll accomplish far more together than you ever could on your own.

- ❏ **1. ROI On Time & $**
- ❏ **2. Meet With Best People**
- ❏ **3. Save / LEVERAGE Time**
- ❏ **4. Follow Up On Appointments / Tasks**
- ❏ **5. Insure Appointments Stick**
- ❏ **6. Connector ~ Get Others Involved**
- ❏ **7. Dish To Others**

Oh … one other thing. You will likely have a whole team that C-Level executives have built to serve together. You are not alone! LEVERAGE others and allow / trust others to LEVERAGE you and together we all will accomplish far more together than we ever could on our own.

❏ 1. ROI On Time & $'s

Time was purposely put in front of $ (money) as we can save money and spend it later but time we are not able to do that. You need to be an expert on Time and the Secret About Time. Every second matters for the Owner / C-Level executive and you will be controlling his / her time. Learning Quantum Time Management which is managing the seconds of their day.

- Become certified in "The Secret About Time" and LEVERAGE the 7 T's, your 7 T's, the C-Level individual's 7 T's and everyone else's 7 T's that come into contact with the C-Level individual.
- Master the "President Clinton's Principle" in protecting them "politically" … their 7 T's.
- Support & protect those who are closest to the C-Level, spouse, family and friends.
- $'s is ROI ~ Return On Investment. Most of the world thinks that C-Level individuals are money driven but it's often very much the opposite.
  - They know that without ROI, there are not jobs, people are out of work.
  - Help others around them to learn "ROI Thinking" so the C-Level doesn't have to fixate on this but can use their gifts and talents to fulfill their Life Vision which will bring the most value to everything the C-Level executive desires at a heart level.
- If there is anyone else in the organization / company who can do something … then get them to do it.

❑ 2. Meet With Best People

It seems that everyone wants to meet with and talk to the C-Level Executive and that is often not the best for the person meeting and the C-Level Executive.

- It's important to help others know that the C-Level executive is not the most powerful / influential person, but those they serve, those around them.
- Someone may think they are meeting with the C-Level executive and you may need to slide someone else into that meeting.
  - People will often naturally tend to get a bit upset if they aren't meeting with the person they thought they were … IF … they think this person is "lower" than the C-Level Person is.
    - This is why you always refer to anyone meeting instead of the C-Level as a "trusted associate."
    - For the C-Level executive to have any life outside of their role they must remove their ego and realize that others around them can often do a far far better job than they do. If the C-Level doesn't understand this … well they will have a hard time letting go of control of their calendar.
    - Those people sliding in for the C-Level executive must be overly prepared and must work to have the person they met with thinking … "Wow … _____________ should have the job of the C-Level." :-)
- If someone / anyone can meet with the person, other than the C-Level then they should.

❑ 3. Save / LEVERAGE Time

"If you want to get something done … do it yourself." is how someone thinks who has no time and zero bandwidth. If you want to get something done give it to the busiest person. .

- .
-

❑ 4. Follow Up On Appointments / Tasks

.

- .
-

❑ 5. Insure Appointments Stick

.

- .
-

❑ 6. Connector ~ Get Others Involved

.

- .
-

❑ 7. Dish To Others

.

- .
-