

## Chief Calendly FAQ

You all have raised some great questions. We've provided more clarification below, and we'll be able to amend this document as needed.

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### 1. Chief branding is also on my personal Calendly events. Can I change this?

At this time, no, we aren't able to change this setting. If you have a personal Calendly account and added the Chief Calendly account, then any Chief branding will also populate on your personal events. Currently, there is no logo uploaded.

Right now, Calendly does not offer a way to change this. However, if you'd like to use your personal branding on your events, please share an email address that is not associated with your current Calendly account and we will resend the Chief Calendly invite to you. As a note, the Chief Calendly account does not include a fee, but you will incur a fee for your personal Calendly account that is not associated with Chief if you choose to have two separate accounts.

### 2. Can I change the email associated with my Chief Calendly account?

Yes! Please let us know the email that you'd prefer to use for your Chief Calendly account, and we'll resend the invite. As a note, if you have 2 Calendly accounts (a Chief account and a personal Calendly account), Chief will only cover the costs of the Chief Calendly account.

### 3. Is there an option to change the "Calendar Confirmation" once a member books a session to an "Email Confirmation?" Also, what's the difference?

Right now all members receive a calendar confirmation immediately after booking a meeting and the event is automatically added to the invitee's calendar.

Calendar Confirmation - A calendar invite is sent to the invitee after booking. The invitee will need to accept the invite for the event to be added to their calendar.

Vs.

Email Confirmation - Your invitee will receive an email confirmation with links to create their own calendar event.

Members can also see their upcoming sessions on their coaching dashboard on Chief.com.

#### **4. Do members receive reminders when a session is coming up?**

They sure do! Members will receive an email reminder 72 hours before their coaching session and again 24 hours before the scheduled meeting.

Members also receive a reminder of a Chemistry Session 48 hours before the event.

Members can also opt into text and email reminders.

#### **5. Can I customize the “Booking Options” under each Chief Calendly event?**

These settings are not customizable, however if you see something that should be added, just let us know!

#### **6. How can I add a buffer time between meetings?**

- ☐ Select the event type
- ☐ Go to Scheduling settings
- ☐ Select Buffer time under Event limits
- ☐ Select the boxes to choose the amount of time to add before or after the event
- ☐ Use the drop-down menus to adjust the amount of time
- ☐ Save your changes

For a more in depth walkthrough here's a [Calendly help center article](#). You can customize the buffer settings for each event type.

#### **7. Can I change how far in the future a member can book a session with me?**

- ☐ Scroll to the bottom of the event type's screen
- ☐ Select Edit this event type

- ☐ Select Scheduling settings
- ☐ Under Date range, choose how many days into the future people can book
- ☐ Specify whether they are calendar days (including weekends) or business days
- ☐ Under Minimum notice, select how far in advance of the start time that invitees can book
- ☐ Scroll to the bottom and select Save & Close, then select Done

For a more in depth walkthrough here's a [Calendly help center article](#). You can customize this setting for each event type.

## **8. How do I sync my calendar with Calendly so that I don't have scheduling conflicts?**

For Apple Calendar —> [Select here](#)

For Google Calendar —> [Select here](#)

## **9. Can I connect multiple calendars to my Calendly?**

Absolutely! [Here's how](#).

## **10. Can I turn off my availability on holidays?**

Yes! You can turn off your availability on observed holidays based on your location by selecting the "Availability" and then "Holidays" at the top of the screen.

## **11. I currently use Calendly for my business. Should I merge my account with Chief?**

If you rely heavily on Calendly for your private practice, we recommend keeping the accounts separate.

## **12. How will members know how to schedule with me?**

Members will schedule with you directly through the Chief platform. You should not share links directly with members. Members must book the session through Chief.com in order for us to approve your invoice.

**13. I don't have any Core Premium members in my group and am not an Executive Coach with Chief, do I still need a Calendly account?**

No. You can choose to hold off on your Calendly account set up until a 1:1 Coaching opportunity arises.

**14. If I have current members who have already scheduled sessions with me through a different scheduling platform, do I need to ask them to reschedule the sessions through my Chief Calendly account?**

No need to reschedule an already scheduled meeting.

**15. Can I customize the "Communications" setting for each of my events in Calendly?**

Chief operates this setting so these are not customizable and are uniform for all Chief Calendly coaching events. However, if you notice something that you think should be added, please let us know!

**16. Are we required to use Calendly to schedule Chemistry, Coaching, and Advisory Sessions moving forward?**

Yes, on November 13th all Chief Guides are expected to utilize Chief Calendly to schedule their sessions moving forward.

**17. Can I send my Chief Calendly link to clients that are not Chief members?**

No, please do not use any of the Chief Managed Event type links for non-Chief clients.

**18. I missed the first Calendly office hours, but I need some assistance. What should I do?**

Email us at [coaching@chief.com](mailto:coaching@chief.com) with any questions you have, or check on the Executive Coaching Guides group on Chief.com.

**19. Does this mean I'm automatically entered into the pool of Executive Coaches? Can I expect to start being matched with members?**

Not necessarily. For Guides who are not currently a part of the Executive Coaching program, the Calendly set up enables you to work with any Core Premium members on their Advisory Sessions or with any of your Core members who purchase a 1:1 Coaching add-on package.

If you are currently a Coach with the Executive Coaching program, you have already set up your Calendly account and there is no further action needed from you.

**20. I thought I wasn't allowed to work individually with my Core members, has that changed?**

Yes! Guides may work with their Core members 1:1 through Advisory Sessions for Core Premium or the coaching 4-pack add-on. While you may share with members that this is an option, please do not attempt to sell members or solicit them for coaching sessions.