

Your Complete Guide to the YOCALÉ SERVICES EXPERIENCE

Yocale prides itself on giving you the best experience possible. Take a look at what working with us is like!



Hello! I'm your Customer Success Manager. I will be working with you to help you get the most out of Yocale. I will help with technical items, training your staff and setting your business up to connect with local consumers and drive online bookings.

- Daily Success Checklist**
Use a simple Daily Checklist to keep on top of daily tasks, and mark off when your tasks are successfully completed.
- Videos and Training**
Easily coordinate training for your team with a mix of in-person, instructor-lead sessions and through videos in our Yocale Video Lab.
- Knowledge Base**
Use Yocale's knowledge base, an extensive resource of Yocale's features and how-to's.
- Blog**
Keep up the best practices, tips and tricks.
- One-to-One Phone Calls**
Contact technical support throughout the implementation process and whenever you have questions.

IMPLEMENTATION

- Using Yocale**
Setup is fast and simple, allowing you to start using Yocale right away.
- Implementation Resource**
All businesses have access to a Customer Success Manager to make the implementation process as easy as possible.
- Communication Tools**
You will have a number of channels for staying in touch with us and successfully using Yocale.
- Technical Setup**
During the implementation phase, you and your Customer Success Manager will quickly complete the necessary tactical items.
- Strategic Setup**
You will also work with your Customer Success Manager to setup your business to maximize online bookings.

TECHNICAL SETUP

- Create Business Profile**
Think of this as your own business website hosted on Yocale. Create a page that can be found by search engines.
- Manage Locations**
Add all of your locations to make it easy for patients and clients to find you.
- Define Services**
Add every service to Yocale including the price, minutes for each service, and transition between appointments.
- Build Schedule**
Start building your schedule. Define your availability and create a schedule for any type of situation.
- Invite Staff**
Give administrators, providers and everyone in the business access to view, book and manage their schedule in Yocale.
- Create Provider Profiles**
Think of this as a Provider's personal website hosted on Yocale. Create a page for each of your staff that can be found by search engines.

STRATEGIC SETUP

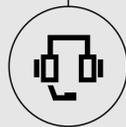
Once you are setup, we'll help you get ready to launch. All the training we do is to help you benefit from Yocale like reducing no-shows and the time spent scheduling people or improving client and staff satisfaction.



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|------------------|-------------------|-----------------------|
| + Yocale Sticker | + Business Card | + Social Media |
| + Voicemail | + Email Signature | + Client Email Invite |
| + Website | + Direct Mail | + Client Reviews |
| + QR Code | + Advertising | + Yocale Easel |

CUSTOMER CARE

At Yocale, your experience is our top priority. We work hard to make sure you never have a technical problem. And, if you do, we'll take care of it right away.



Process
The process is efficient and painless. Issues are resolved conveniently.

- Submit a Case**
Submitting an issue is easy. You can submit a case by using the Help button at yocale.com and completing the form. You can also call 1-778-986-2253 or email us at support@yocale.com.
- Quick Review**
The case will be reviewed by a member of our customer care team and assigned to a representative that can help you.



We are Always Here! We'll stay in contact with you to make sure you make the most out of Yocale.

ONGOING ADVOCACY



Check-In Calls
Your Customer Success Manager will contact you to check in and see how Yocale is working for you.



New Feature Updates
You'll receive email updates that will explain any new features we've added.



Gather Feedback
You are able to provide feedback any time through your Customer Success Manager.