



KICKOFF MEETING CHECKLIST

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Technical Setup

Check that all of the following areas are properly set-up.

- Set Yocale to default on browser (use Chrome ideally)
- Like Yocale on Facebook
- Follow Yocale on Twitter, Google+ and Instagram

Business Profile

- Business name
- Location
- Public phone
- Time zone
- Public profile URL
- Description with keywords
- Business hours
- Photo quality/size/placement
- Services with keywords
- Staff invited

Provider Profile

- First and Last Name
- Category
- Designation
- Gender
- Locations
- Public Phone
- Time zone
- Public Profile URL
- Description
- Photo quality/size/placement
- Services with keywords
- Delete business services that do not apply (if associated with a business)

Schedule

- Are they using it?
- Default service
- Default location
- Add appointments from all calendars
- Overview of basics with contact:
 - Managing your schedule
 - Navigating the calendar page
 - Managing appointments
 - Adding appointments from the calendar
 - Adding new clients from the calendar with email
 - Mark appointments as complete
 - Managing clients
 - Using the tools
 - Setting preferences

Strategic Setup

Check that all of the following tools are in place to provide maximum visibility.

- Sticker on door and / or visible locations
- Easel in visible location in waiting area
- Email Signup Sheet in visible location
- Social Sharing Posters in exam rooms or visible locations
- Tablet or computer in waiting room for patient or client setup (optional)
- Book Us Online PowerPoint slide on TV screens
- Book Us Online Commercial on TV Screens
- Book Us Online Button on website
- Book Us Online information and / or QR code on business cards
- Book Us Online information in emails
- Book Us Online information and / or QR code in direct mail and advertising
- Book Us Online information in prominent position on Facebook Page, Twitter account, Google+, Instagram
- Follow Yocale's Facebook promotions to share these messages with patients or clients
- QR code in visible location (optional)
- Voicemail recording with reference to Yocale
- Invite patients and clients to join Yocale
- Encourage patient and client reviews

Next Steps

Schedule the following meetings.

- Follow-up meeting, if necessary. DATE:
- Training for Providers. DATE:
- Milestone Calls:
 - Current patients or clients invited to use Yocale within 1 week of go live. DATE:
 - At least 3 current client bookings via Yocale within 30 days. DATE: