Calendly Instructions for Nest Advisors

We'd like to provide a consistent member experience as frequently as possible. Calendly is a simple way to set custom hours & connect your calendar in order for members to schedule with you. We'd like for you to create your own account. There is a Free Version that will meet your needs. I use the $12/month so I can connect my PayPal for 1:1 client appointments. https://calendly.com/marcystoudt

Feel free to try my Mentor Session | Executive Mom Nest link to understand how the process could work from a member experience. After you schedule an appointment with me … we can use that time to say hello, or feel free to cancel it.

Anything in purple indicates Executive Mom Nest consistency.

1. **+ New Event**
2. **What is this event?**
   - **Event Name:** Mentor Session | Executive Mom Nest
   - **Location:** Your choice if you offer more than just phone. I connected my Zoom, so she can choose zoom or phone - GoTo Meetings is also available.
   - **Description**: *You may personalize towards your services*
3. **When can people book this event?**
   - You may customize your availability, duration of the event & buffers.
   - We recommend that Mentor Sessions are 30 minutes. But, that's a recommendation.
4. **Invitee Questions:**
   - **Name**
   - **E-mail**
   - **Phone Number:**
   - **We're here for you! How can I serve you?** Please share your reasons for this Mentorship Call.
   - **Optional to add any more questions**
5. **Notifications & Cancellation Policy**
   - **Calendar Invitation** *Option to personalize*
   - **E-mail Reminders**, *Option to personalize & Add the cancellation policy & add the member feedback link: https://marcy741001.typeform.com/to/HC96A9ol*
   - **E-mail Follow Up,** *Option to personalize (Coming soon … feedback survey form on the session) add the member feedback link: https://marcy741001.typeform.com/to/HC96A9ol*
   - **Text Reminders:** *Option to include if your plan allows*
   - **Cancellation Policy**: Please cancel within 12 hours of the event to avoid a $50 administrative fee.