11 tools to optimize your business

Tool #1: Online Calendar
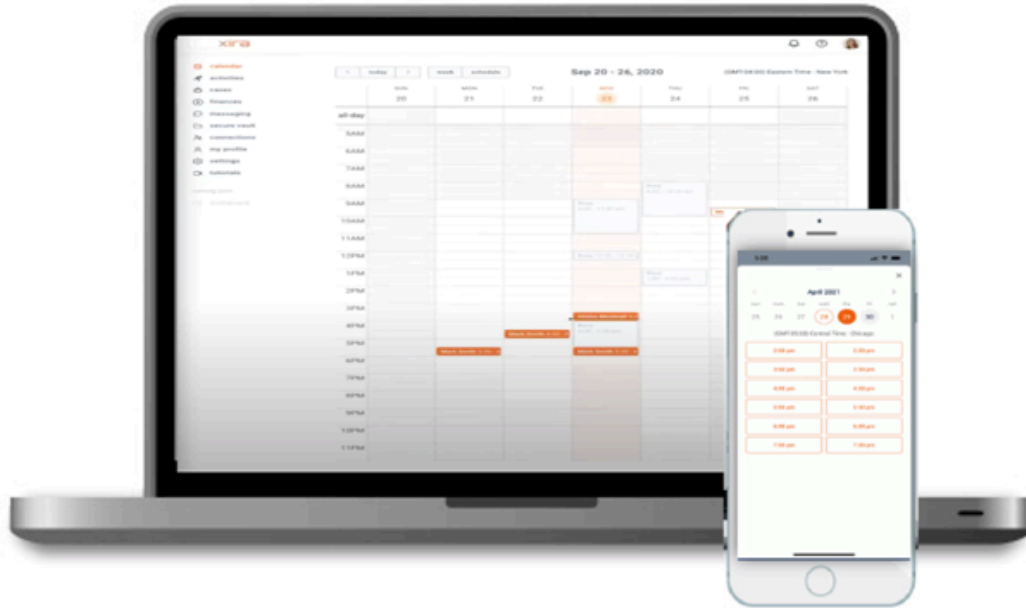
xira
find • book • meet

4 advantages of XIRA's online calendar

1. helps you schedule meetings without the back-and-forth emails

2. easily access your calendar on your cellphone or tablet with XIRA's mobile app

3. view upcoming meetings with existing clients or initial consultations with new potential clients at anytime from anywhere

4. save time by allowing everyone to collaborate using one, integrated calendar

Calendars have become an import part of managing our daily lives and events. They are the heartbeat of your practice. In fact, managing your practice without one would be catastrophic. The rise of digital devices has heavily diminished our habits of using paper planners to organize critical tasks in order to get things done. Whatever you do and wherever you go, you seem to never forget to take your mobile phone with you. So, understandably, many more solo-small law firms are moving their organizational systems to a digital environment.

XIRA's online calendar
XIRA's platform contains a complementary, integrated, online calendar that automates scheduling appointments with potential or existing clients.

Our online calendar helps solo-small law practitioners:
• increase client acquisition through real-time availability
• stay on top of important client meetings
• increase productivity by managing meetings from any device (laptop, mobile phone, or tablet)
• reduce stress and improve visibility through proper calendar management.

make it easier for new and existing clients to meet with you

new potential clients: New clients conduct a search on XIRA for an attorney that meets their needs. Once they find you, they will see your calendar and are immediately able to schedule an initial consultation with you based on availability on your online calendar.

existing clients: You can send your existing clients an invite via XIRA's connections tool enabling them to join XIRA. Once they register, they will have access your online calendar to see your available time slots and book a meeting with you. This avoids the need to go back and forth in order to figure out when you are both available to meet.

registration

Upon initial registration, you will be required to connect a personal calendar in order to get listed. This is because your calendar is the most important part of your presence on XIRA - allowing clients to see your availability in real-time and book appointments with you. ***Note: it is important to keep your calendar connected at all times. Otherwise, clients will not be able to find you when they conduct searches and will, therefore, be unable to see your availability to schedule meetings with you. You will also be notified that your calendar is disconnected with a red error message on the XIRA platform that remains displayed until your reconnect your calendar.***

Registration and calendar set up can only be done at XIRA.com via a laptop or on a mobile device using a standard browser (e.g. Chrome, Safari, Edge, Firefox, and Opera).

how it works

Simply:

1. connect your calendar
2. define your advanced calendar preferences
   - enables new and existing clients to book appointments based on your availability
3. see appointments added to your personal calendar
4. receive client meeting details and reminders via email confirmations

When potential clients are looking for legal advice, 96% of the time they start online. Recent research indicates that most client leads will typically only wait one hour to be responded to. XIRA helps increase your client acquisition and response rates by combining your 24/7 online presence (your searchable profile and real-time access to your calendar) with a client's ability to proactively book an appointment with you immediately rather than you having to remember to get back to that warm lead to set up an appointment. Both you and the client receive an email confirmation that a meeting has been scheduled for an available time slot on your calendar. Also, If you have the XIRA app on your mobile phone, you can get messages about leads instantaneously.
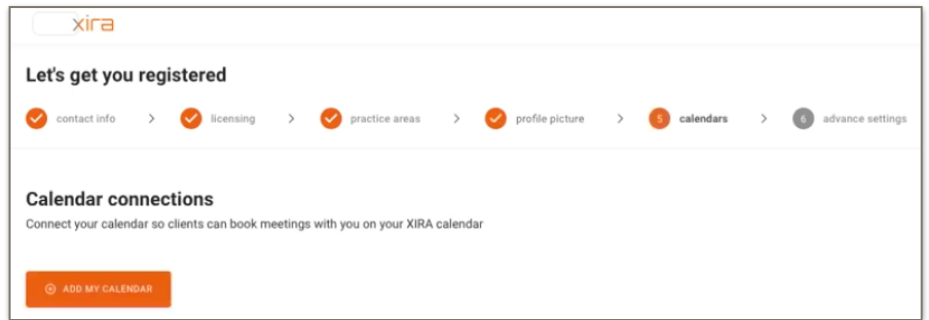
supported calendar types

GAVEL supports the following personal calendar types:

• Google
• Apple iCloud
• Microsoft Office 365 Outlook

**connecting your calendar**

Setting up your calendar is easy. Just follow these simple steps (or watch our calendar tutorial) and let XIRA do the work for you:

1. Under "Calendar connections" click orange "ADD MY CALENDAR" button

   - during the initial registration process, connecting your calendar is done in step 5 (see image below)
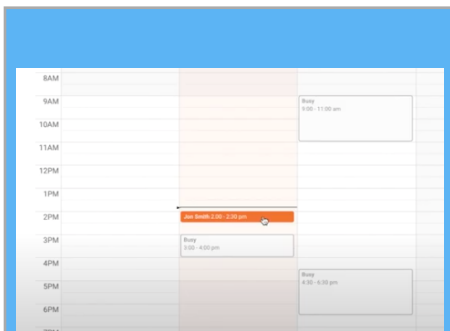
xira

Let's get you registered

✓ contact info > ✓ licensing > ✓ practice areas > ✓ profile picture > **5 calendars** > 6 advance settings

Calendar connections
Connect your calendar so clients can book meetings with you on your XIRA calendar

⊕ ADD MY CALENDAR

2. determine what supported calendar type you use to manage your firm's appointments. Click "CONNECT" button to follow pop-up window instructions (please be sure pop-up are enabled on your browser).

3. set the calendar to check for conflicts to prevent double bookings by moving toggles to include (orange) or remove (gray) various conflicts

Set the calendar(s) to check for conflicts to prevent double bookings

🟠 **Calendar**

🟠 **United States holidays**

⚪ **Birthdays**
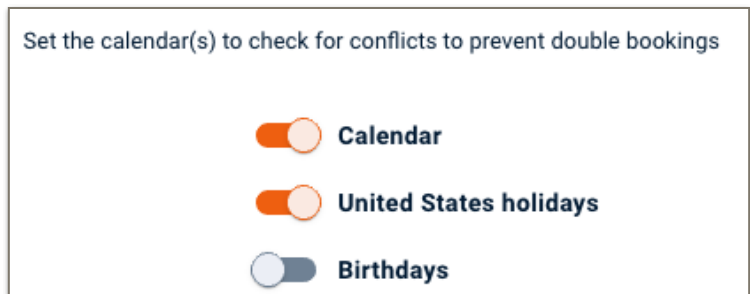
4. click orange "CONTINUE" button.

5. set up your XIRA calendar by selecting which personal work calendar you would like XIRA appointments to be saved to. If you maintain multiple calendars to manage work/life events, you can sync more than one calendar. However, you will select only one work calendar where you would like visibility to all new booking in XIRA to appear.

6. in the drop down box, select "calendar" and then click orange "COMPLETE" button. If the "COMPLETE" button is not clicked before closing the browser, the registration is incomplete and cannot be processed.

7. the connected personal work calendar will now be selected as your XIRA calendar where all XIRA meetings will be managed.

Once you connect your personal work calendar, your XIRA calendar identifies existing non-XIRA appointments as "Busy" time slots which are unavailable for clients to book appointments. All XIRA appointments with clients will appear in orange on your calendar.

No content from your personal calendar is ever visible to XIRA or clients and is not accessed by XIRA for any purpose other than to ascertain whether you are available for clients looking to schedule consultations with you.

busy and free time slots

working hours

free and busy time on your personal work calendar

Our integrated calendar replicates only the free and busy times on your personal work calendar. Note: "Tentative" meetings are NOT marked as busy time slots on your XIRA calendar. This means if you have existing meetings marked as "Tentative" on your personal work calendar, clients WILL be able to book appointments with you at the same time as the "Tentative" meeting (provided the "Tentative" meeting occurs during the working hours you've selected to be available to accept client meetings on XIRA - see the "**define your advanced calendar preferences**" section below).

If you happen to set up an all-day event on your personal work calendar and mark it as "Busy", then your XIRA calendar will show you unavailable for clients to book appointments with you for that day. We recommend that when you use an all-day event as a placeholder for reminders (e.g. last day to file an opposition brief) that you mark the event as "Free" (vs "Busy") in your personal work calendar so clients can still book appointments with you. Otherwise, you will show as unavailable the entire day.

Attorneys wanting to block off time in their personal work calendars to remind them of time they set aside to be open for XIRA appointments should mark the event placeholder as "Free", so clients can book meetings. However, if you do need to schedule an urgent, non-XIRA appointment that overlaps with the time you set aside for potential XIRA meetings, clients will be unable to book an appointment with you as they will see the time slot as "Busy".

define your advanced calendar preferences

After your calendar has been connected, you are ready to move to step 6 "advance settings". This is where you customize your presence and availability preferences on XIRA.

1. begin by **selecting your working hours**: set the days of the week and times for each day you want to be available to accept client meetings. Then, hit the "SAVE" button. Only the time periods you've selected will be shown as available on your XIRA calendar to clients.

    Note: your online calendar will only show your available time in 30 day increments enabling clients to meet with you at a date/time that is convenient for them while also allowing you the flexibility to manage and plan future calendar activities.

2. next, set how much **advance notice** you require before someone books a meeting with you. Advance notice times can be set anywhere from 15 minutes to 2 days. If you need additional time before meetings to conduct a conflict of interest check, set your advance notice to an amount of time sufficient for you to conduct your conflict check.
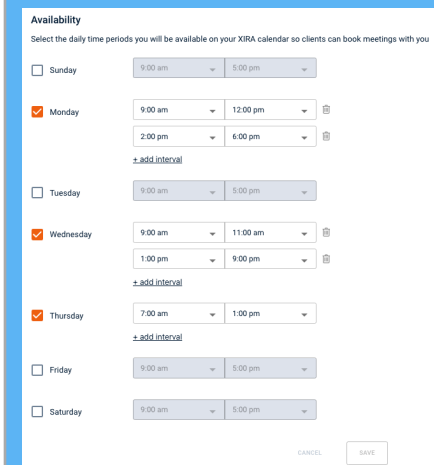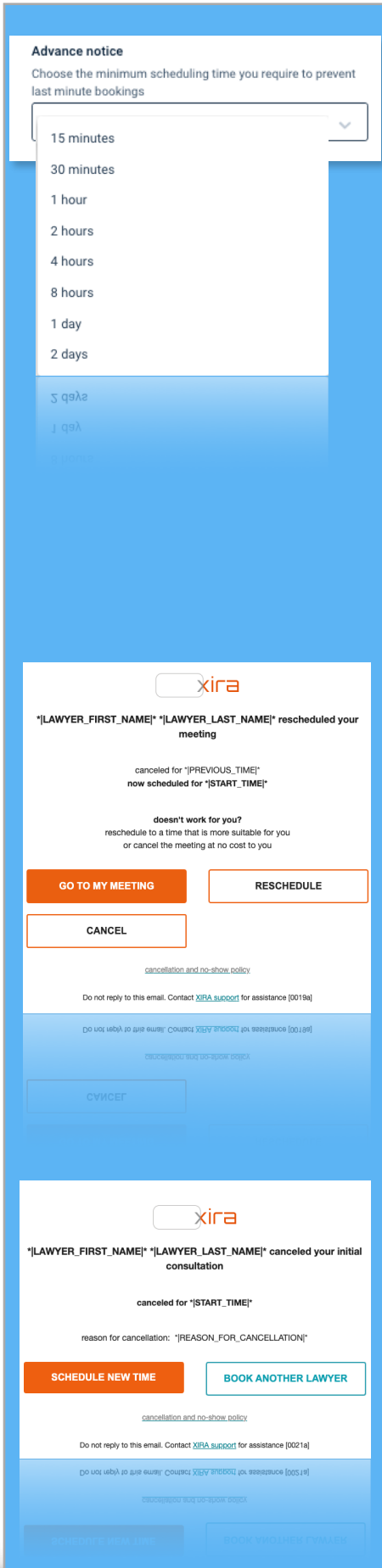
Keep in mind that if you set your advance notice for >24 hours, you may risk losing a potential client to another attorney due to the fact that 48% of clients view being able to meet with an attorney immediately as the third most important factor when selecting an attorney (standard hourly rate and free initial consult being the first two criteria).

3. set the **event buffer**, or time gap you need between appointments.

4. your **time zone** should be automatically populated based on your previous registration information. However, if you are working remote in a different location, you can change you time zones at any time from the drop down menu.

5. click the orange "COMPLETE" button. Your online calendar and preferences are now established, but you can always come back and modify them. If the "COMPLETE" button is not clicked before closing the browser, the registration is incomplete and cannot be processed.

rescheduling or cancelling a XIRA meeting
We understand that your schedule is busy and you may need to reschedule or cancel a client meeting from time-to-time. Here are the steps to reschedule or cancel a XIRA meeting:

1. log into the XIRA mobile app or XIRA.com and select "calendar" in the menu, or click orange "MY CALENDAR" button from the email confirmation you received.

2. open the orange client meeting you wish to reschedule.

3. click "MANAGE" and then select "RESCHEDULE" or "CANCEL".

4. let the client know why you wish to reschedule or cancel the meeting, click "CONFIRM".

5. an email is sent immediately to your client letting them know you are rescheduling or canceling the meeting. The client will have the option to schedule a new date/time with you (provided you agree to still meet with them) or select a new attorney.

6. the original meeting will show as canceled on your personal work calendar.

Please be aware, if you do not reschedule or cancel an initial consult in your online calendar, the client will not be notified of the meeting change and you will be charged a no-show fee for the scheduled meeting.

vacation scheduling

Time away to recharge or to attend a family event is very important. It is also important to manage existing XIRA appointments and update your XIRA calendar so no new client appointments are scheduled during the time you will be away.   Below are the steps to manage vacation scheduling:

1. in your personal work calendar (e.g. Google, Outlook, Apple iCal) set up an all-day vacation event (or reoccurring vacation event) and mark it as "Busy".

2. you will still be visible to clients in searches and they will still see your calendar to schedule future appointments, but they will not be able able to schedule appointments during your vacation event.

We recommend that you do NOT disconnect your calendar to manage vacation time. Otherwise, your calendar history will be permanently deleted from your profile and may impact your activities and invoicing. Plus, you will not be visible in searches if you do not have an active, connected calendar.

modifying your calendar

You can modify your calendar connections or advanced calendar preferences at any time by logging into XIRA.com and then go to "settings".

Now, you are an expert at managing your XIRA online calendar!

stay current with XIRA's latest activities and media coverage. check out our press page and like and share our social media pages