

Sense Meetings

SET UP GUIDE

Overview

Sense Meetings simplifies the process of booking meetings between hosts (i.e. recruiters, sales, marketing) and external attendees (i.e. candidates, clients, vendors). Because it automatically integrates into Sense Chatbots and Sense Messaging, it saves even more time for your recruiters.

Benefits

- Automate the task of scheduling (and rescheduling) meetings
- Eliminate time wasted going back-and-forth
- Increase recruiter efficiency
- Choose individual or team templates
- Share via email or SMS
- Integrate with Google, Exchange, Exchange 365, Outlook, Yahoo & AOL Calendars

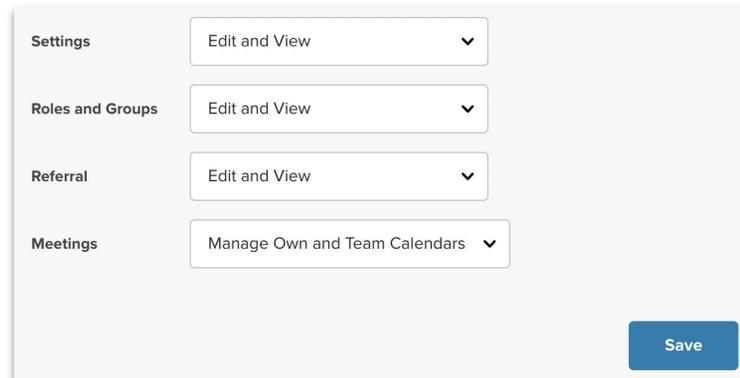
Steps to Get Started

Step #1: Invite Users to Sense (for Admins & Team Managers) *others can skip to Step #2

Everyone using the product will need to authorize Sense Meetings to access and schedule meetings on their individual calendars. Once each user has set up an account and is on the Sense platform, an admin can grant them access to Scheduler from the roles page (Settings > Accounts > Roles > Edit or Add new role > Meetings)

Designed for **individual recruiters**, Manage Own Calendar allows users to sync their own calendars and share availability with attendees.

Designed for **team leads, supervisors, and administrators**, Manage Own and Team Calendars allows users to sync their own calendars and share availability with attendees and create and manage team templates.

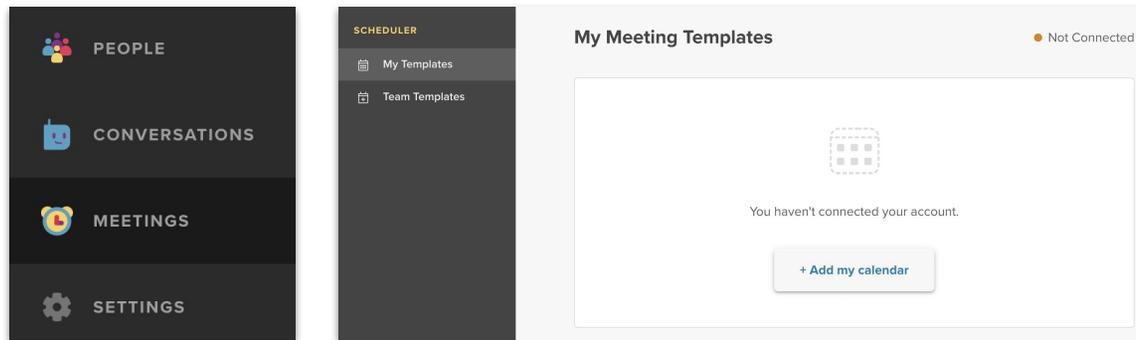


Settings	Edit and View
Roles and Groups	Edit and View
Referral	Edit and View
Meetings	Manage Own and Team Calendars

Save

Step #2: Connect Calendar

Once logged in, users can click on Meetings in the left-hand navigation. This will take them to the main scheduler page where they can click on 'Add my calendar' to synchronize with Sense Meetings. The exact steps required to authenticate will vary based on the user's chosen calendar program, but each user will be directed to select their calendar account, log in and authorize Sense to read and write to it. Once the calendar account is successfully synchronized, the user will be redirected to the Template list view page.



Step #3: Set Up Templates

Sense Meetings templates can be customized with a number of parameters, such as length of meeting (30 minutes or 60 minutes), work hours, and attendee information. By default, Sense Meetings will ask for the attendee's name, email, and cell phone number. Click on 'Add question' to customize with any additional information you wish to gather. You can also configure Reminders to go out before the meeting.

Other options: The other options tab allows the attendee to customize the URL link for the template, select a brand (if there are multiple), and select the calendar. Hosts can also add custom text to the bottom of the page.

Once the template has been created, users can check that it's correct by clicking on the Preview button (bottom left side of the screen) and making any changes.



Step #3: Set Up Templates (continued)

For Admins: Setting up Team Templates

Sense Meetings facilitates round robin scheduling, where attendees can book time on one of multiple host calendars through a single template. This type of scheduling is best suited for situations where multiple hosts (such as recruiters or sales reps) perform identical functions and can accept events interchangeably. Choose between two options:

Optimize for availability

This method, which results in the greatest number of options, offers a time slot to the attendee when any one of the participants is available.

Optimize for equal allocation of work

This method optimizes for equal allocation of work between the participants in the team template. Participating hosts with more events assigned to them will not be assigned new events until the other participants in the team template catch up in workload. This may result in fewer time slots displaying on the booking page.

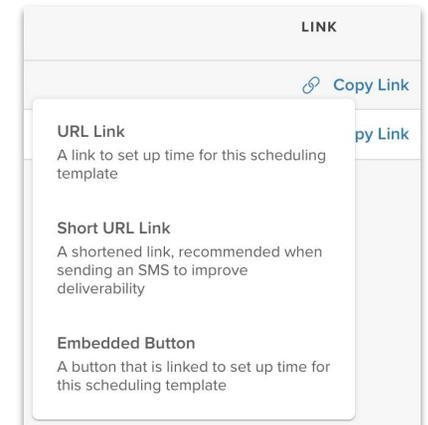
Step #4: Share With Attendees

There are three ways for hosts to share the meeting link with attendees:

Full URL: This method is best suited for sharing the template via email or Chatbot.

Short URL: This method is best suited for sharing the template via SMS to improve deliverability and reduce the message length.

Embedded button: This method will copy a "Meet with me" button with an embedded URL link. This can be copied into an email signature or sent as a regular email.



Once you have set up your Sense Meeting, you can share it individually or add it as a touchpoint to an existing Journey. For example, if a candidate passes pre-screening, you may want to trigger a notification in the Chatbot to schedule a meeting. But it can also be used independently to set up a meeting.

Sense Meeting: the Attendee Experience

Once an attendee clicks on a button or a link to your meeting, it takes them to the meeting booking page, where they can select from a list of available times in their local time zone. Once selected, the host's calendar will be automatically updated with the meeting information. After the time slot is confirmed, a confirmation message will be sent to the attendee with any custom questions. Once all the custom questions are answered, the attendee can book the event with the host.

Pro Tip: Sense Meeting Reminders

You can customize any Meeting by configuring Reminders to hosts and attendees. We recommend setting up at least two reminders before interviews with candidates—it makes a big improvement to attendance rate. Hosts can choose either email or SMS reminders. Email reminders can be sent to both hosts and attendees, while SMS reminders can only be sent to attendees. When using SMS reminders, Sense will attempt to deliver the reminder message using the host's Messaging phone number when the host has access to Sense Messaging. For hosts that do not have access to Sense Messaging, Sense will use the default Engage SMS phone number to send the reminders.

Have additional questions? Reach to our Customer Support Team at support@sensehq.com.