

# Appointment-Based Shopping

A GUIDE FOR

GETTING STARTED

WS



Appointment-based shopping is a great solution to help customers feel safe as they ease back in to the in-person shopping experience. With an organized, thoughtful approach and the right tools to help you manage the logistics, the process can be simple and help set your store apart.

The appointment-based approach can take two forms: **Pre-scheduled appointments**, in which shoppers select a shopping time in advance, and **on-arrival queuing**, in which shoppers enter a virtual line once they arrive on property and are invited to enter the space when capacity allows.

You may find only one of these tactics works for your business, or you may explore a blend of the two. Both offerings allow retailers to engage with customers in a safe, one-to-one way and encourage visits in the near term.

## 5-STEP IMPLEMENTATION PLAN

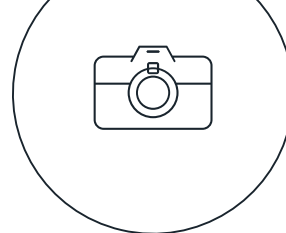
### 1. PICK YOUR PLATFORM

An online booking tool is key to a successful launch of appointment-based shopping, regardless of which approach you choose. The platforms suggested below generally outperform in the categories of cost, user experience and ease of implementation.

#### Book-Ahead

- [Calendly](#): \$8/month/calendar. Schedule 1:1 or group meetings, from personal hair stylist to community yoga.
- [SquareUp](#): \$50/month for businesses with 2-5 employees; \$90/month for 6-10 employees; larger businesses, contact for pricing. Square's appointment booking service integrates with its POS system.
- [Appointy](#): Seamless integration with Stripe and PayPal. Free for fewer than 100 appointments/month. After that, the cost is similar to Square.
- [Acuity](#): \$15/month/calendar. Allows you to send customized confirmations that incorporate your branding. Reminders and follow-up messages can be sent via email or text.
- [Sesami](#): Free app that integrates with Shopify. Lets customers book and pay for appointments directly from your website or POS.





### On-Site Waitlist and Virtual Queuing

- [Waitlist Me](#): Starts at \$19.99/month. Allows guests to see your public waitlist, and you can notify guests directly about their spots in line. Customization available for restaurants, service or appointment-based businesses and more.
- [Waitawhile](#): Free, with greater customization pricing available. Provides public waitlists, features 2-way calendar integration for bookings and is mobile optimized.

## 2. CREATE CONTENT TO AMPLIFY YOUR APPOINTMENT OFFERINGS

Once you have selected your preferred approach and booking tool, you will need to add messaging about this special offering in the places where customers naturally find your content.

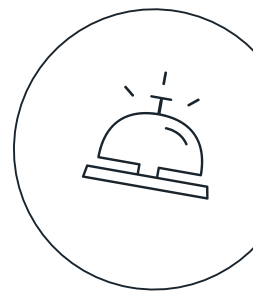
- Add appointment-based shopping to your website. This could be a pop-up message on your landing page, a new tile on your site or a call-to-action in your site menu or footer. If your site has a blog, consider a post about your new offering, and give a detailed explanation of the experience a customer can expect.
- Add messaging to the social platform(s) you typically use to market your business. On Instagram, for example, you could post to your grid with a compelling image/caption announcing the new offering and update your bio to read “appointment-based shopping now available.” You could consider making your bio link point directly to your appointment-booking function.
- Reach out to your database with a dedicated email to let them know about your new offering. Depending on your email technology and platform selection, you may be able to embed a booking opportunity within the email itself. If not, design your email so that the click-through takes readers directly to the new booking portion of your site.

## 3. CAPTURE NEW CUSTOMERS

Now is the perfect time to capture new customers with strategic messaging at your storefront and through additional ads.

- If your location allows, consider an A-frame sign placed outside your door with booking details that passersby can use in the moment. Potential customers who may not feel comfortable walking into your store might be persuaded to book an appointment if they see signage about this amenity in your window or near the entrance.





## CAPTURE NEW CUSTOMERS (CONTINUED)

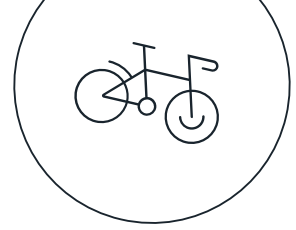
- If your marketing budget allows, consider small business ads that can reach new customers. Gmail ads, for example, have a headline of up to 25 characters, which can include a compelling announcement, and a description of up to 90 characters, which can include a call-to-action. These small-scale text ads are a great way to test informing prospects of your business through the lens of “we’re considerate of your preferences and available to you now”.

## 4. GET CREATIVE

Interesting twists and special additions to your appointment offerings can help make them feel special and sought-after.

- Consider themes that offer a compelling reason for potential appointment customers to book. For example: Dedicate a weekend day in early June to Father’s Day shoppers. Have a selection of dad gift ideas on hand and include a complimentary card with every purchase made during an appointment. Or explore booking themed group appointments (as physical distancing allows), such as mother/daughter dates, girls’ nights, bridal showers, team outings, etc.
- Use appointment-only shopping as a complement to your regular schedule. You can dedicate a morning hour or add a block of two hours in the evening for appointment-only shopping in order to serve customers who aren’t comfortable with regular foot traffic in the space.
- Appoint a host to recruit attendees for a private event. Set your host up for success by creating an exclusive private experience, with special touches and a valuable promotion. The host can recruit guests and add a layer of both familiarity and selectivity to the experience. Consider partnering with a local nonprofit or charity for a special give-back shopping night. Donate a percentage of sales to the organization and enjoy the new reach of the charity.
- Make it educational. Hold an RSVP-only class to engage with your customers in a way that feels natural for your business. For example: invite your customers to attend “Styling 101: how to optimize your wardrobe with five essential items.” You can also invite an expert (who is not you) to come in and speak.
- Partner with one of your vendors to set up a pop-up in shop. Reach out to customers who have shopped that brand in the past and invite them to attend the event.





## 5. RETAIN THE CUSTOMER, BUILD THE RELATIONSHIP

The retailers we see using appointment-based shopping report great results. In booking an appointment, a customer has taken an extra step to shop, meaning he or she is truly interested in making a purchase. You can leverage this energy and intent by scheduling another appointment or visit at the end of the initial visit. Some booking tools enable scheduling at the point of sale, so it can be a seamless add-on during check-out.



**SHOPPING  
APPOINTMENT  
IN PROGRESS**

**We're with a customer  
at the moment. Please  
knock if you need us.**

**CALL OR VISIT US ONLINE TO BOOK**

**YOUR OWN PRIVATE SHOPPING EXPERIENCE**