



BookYourExpert

Expert Manual

Agenda

A large blue curved shape on the left and a large green curved shape on the right, both partially cut off by the edge of the slide.

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01

About

Our Origin: One Planet Lab

Boost your knowledge and access new networks

A do-tank for resource-saving projects and pioneers



Hosted and initiated by WWF Switzerland
Supported by the Mercator Foundation Switzerland
and the Hamasil Foundation



Hamasil Stiftung

The Context

OUR VISION

Your access to knowledge for sustainable know-how, whenever you need it!

OUR MISSION

It aims to provide vetted, tailored and convenient support when it is needed. Our goal is to facilitate and accelerate positive environmental impact by enabling pioneers from the bottom-up.

MILESTONES

A prototype of the portal was launched in February 2022 and has been tested with partner programmes and our broader community, thanks to the generous support of the Mercator foundation. Now that we have confirmed the need and interest for such a portal, we are shifting to an actual platform solution. The goal is to continue to grow our network of experts, partners and projects seeking to become more sustainable.



Portal Statistics (Q1-2024)

+80

Vetted Experts

+80 (170)

Projects supported (pioneers reached)

+180

Booked expert sessions

75%

Success rate: Users reported that the sessions solved their problem

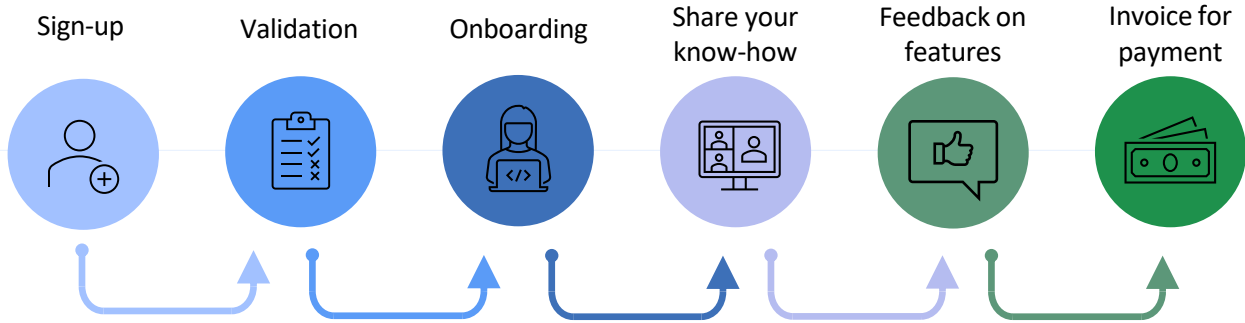
95%

Users report that experts and sessions were «very good» to «excellent»

10+

Sustainable accelerator programmes supported

The steps: what to expect?



Jun 24 & Dec 24



Important Participation & Booking Rules (1/2)

- Our [new expert service agreement and general terms & conditions](#) must be approved during registration. If you qualify as self-employed, please provide your AHV proof via Email.

- Only completed profiles will go live meaning that all necessary onboarding steps have been completed. You will receive a notification once your profile goes live.

Experts can be booked by **two user groups***:

- (1) **Sustainable projects run by start-ups or non-profit organisations**, e.g. participants in partner accelerator and other support programmes, individual applicants from the One Planet Lab community
- (2) **Companies** who are trying to implement more sustainability in their businesses via dedicated pilot projects, e.g. recommended by sustainable business partner networks or independent applicants. In addition, **exclusive programme booking pages** ("Branded Space") can be made available to a **specific portal user group as part of a partnership**.

* Detailed terms in expert agreement

- We offer **four standard sessions of varying length** including three payable (30', 60', 120') and one free (15') session. Standard rates vary between **CHF 130 and CHF 160 excl. VAT** depending on the user group (1) and (2).

- **Bookings are initiated by portal users/sustainable projects** who can search for your profiles online. This is important so that we can facilitate the payment and invoicing process. Bookings that have been bilaterally agreed upon and have not been recorded in the portal will not be accepted and will not be paid for.

- Bookings and booking amendments by portal users possible **latest 48hours before the meeting** unless otherwise agreed. The expert and the portal user may still agree bilateral changes less than 48 hours before the meeting. In this case, the change must be initiated by the expert.

Important Participation & Booking Rules (2/2)

So that portal users can book expert sessions with you, you have two options:

Set up fixed weekly availabilities (e.g. 3-5 pm every Thursday) so that customers can book sessions only during this time slot.

If your week schedule changes, you can manually block your time in your portal calendar.

If the booking you have received **no longer fits your schedule**, please contact the portal user (s. contact details in email confirmation) and change the booking yourself.

Booking amendments initiated by you as an expert are **not restricted to the hours you specified as fixed availability** (e.g. 3-5 pm every Thursday).

However, **if a portal user reschedules** the appointment, he/she will need to cancel the booking and **reschedule by finding an available time slot according to your fixed availability**.

Connect your Google calendar to allow two-way syncing.

This will allow full flexibility and portal users may book a session with you whenever you are free.

- Recommended option if you have **one up-to-date Google calendar**.

You don't use Google calendar, but you still want to sync one calendar? Have a look at our **Google Sync. Workaround** guide.



Our Expert Sessions

Standard

Eureka

(30')

Dig-in

(60')

Deep-dive

(120')

*Paid

First Meet

(15')

free

Pro Bono

Optional

Pro Bono S

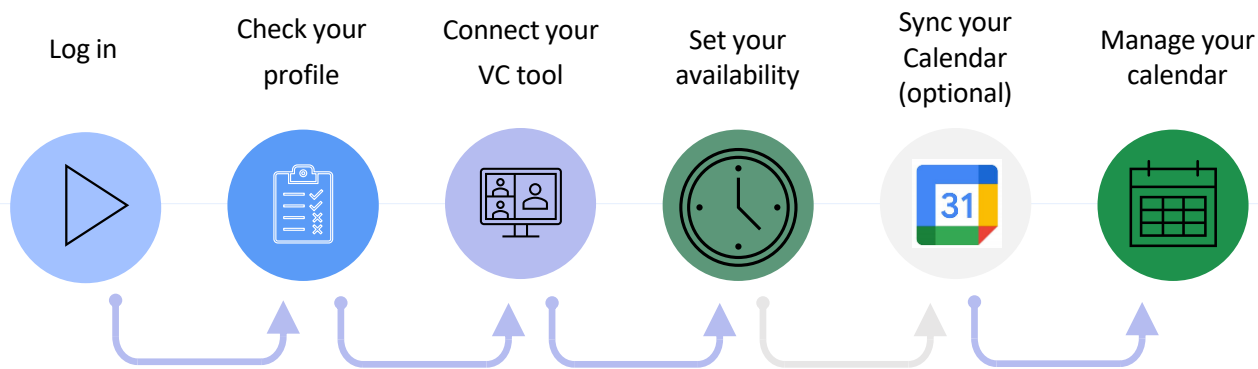
(30')

Pro Bono M

(60')

*Prices according to expert agreement, varying hourly rate between CHF 130 and CHF 160 excl. VAT depending on user group, or bilaterally agreed price for a "Branded Space" as part of a partnership model

The steps: what to expect?

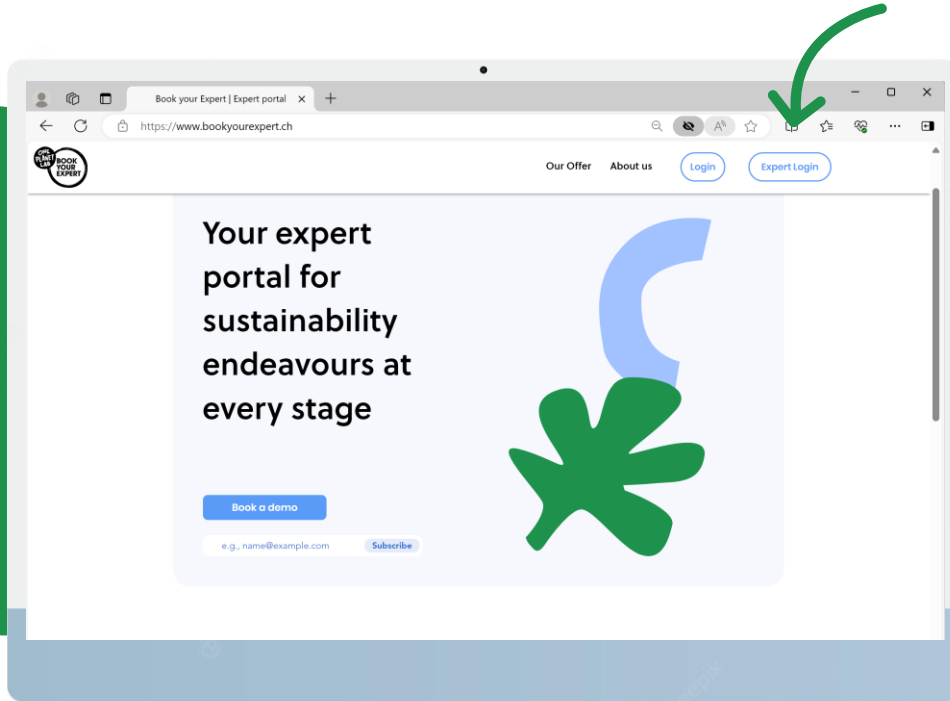




02

Log in

The website



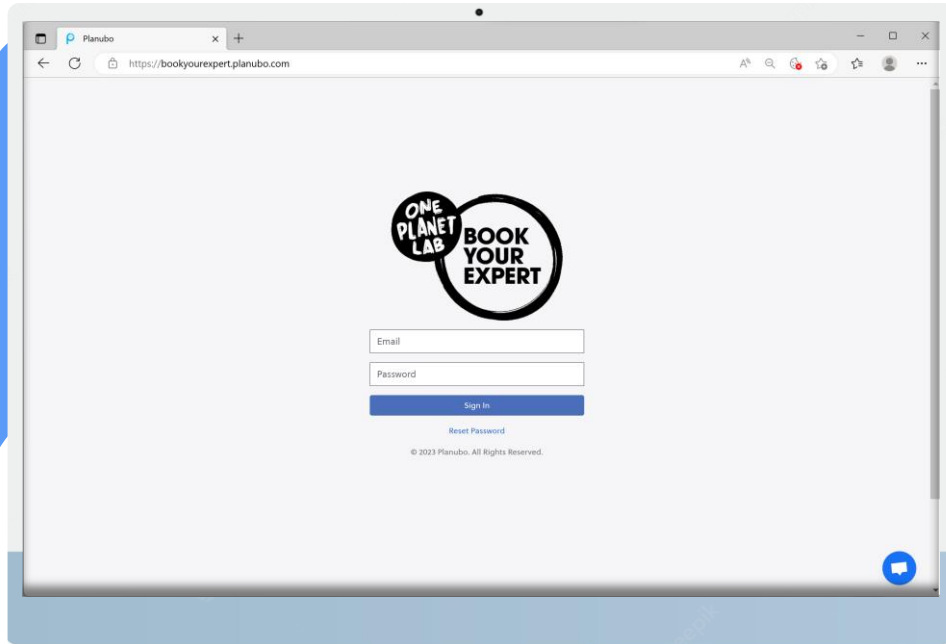
Navigating the website

- “**Our offer – For Experts**” provides an overview from your perspective
- Expert profiles are **not public** – only accessible by users after log in
- “**Expert Login**” will guide you to the right log in page
- Website & Portal available in **German, English & French**

Important...

- With “Expert Login” you will be directed to our new portal which is powered by our **technology partner Planubo**. Alternatively, you can save this **direct link*** .

Logging in



Get started with your account

- Log into the portal with your **login details from your registration.**

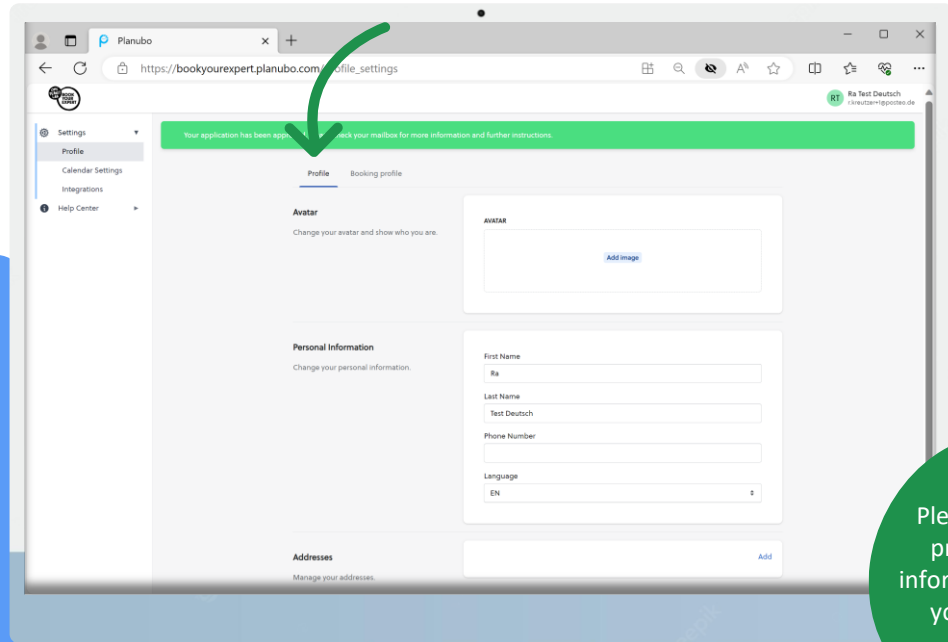
Important...

- PW not working or forgot your PW? Please **reset your password** and follow the instructions sent to your mailbox.

03

Check your profile

Changing your profile settings

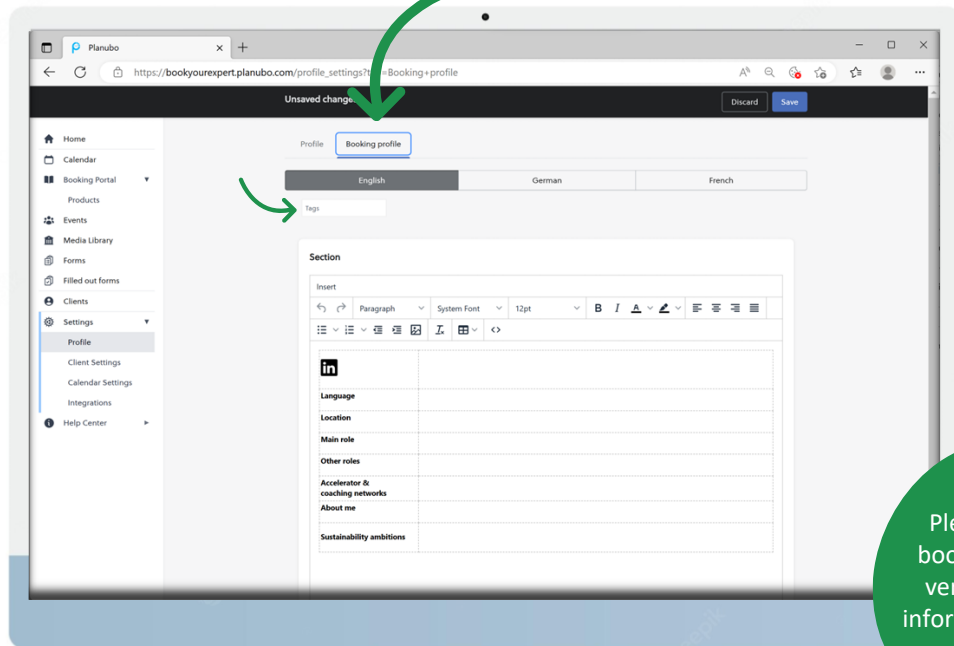


Please go to your profile, amend information & select your preferred language

Check your profile

- Click on **“Settings”** and select **“Profile”**
- **“Profile”** tab opens:
- Upload/Change your Avatar (profile picture)
- Check your personal information and select your preferred language
- Add your **invoice address**
- Change your password
- Save your profile

Amending your booking profile



Please go to your booking profile and verify all pre-filled information and make necessary changes.

Verify your profile

- Click on **“Booking profile”**
- **Add or remove tags**
- **Validate / amend your profile** in your language (English, German or French). Translations in other languages are welcome. We will do the final check
- **Save your profile**

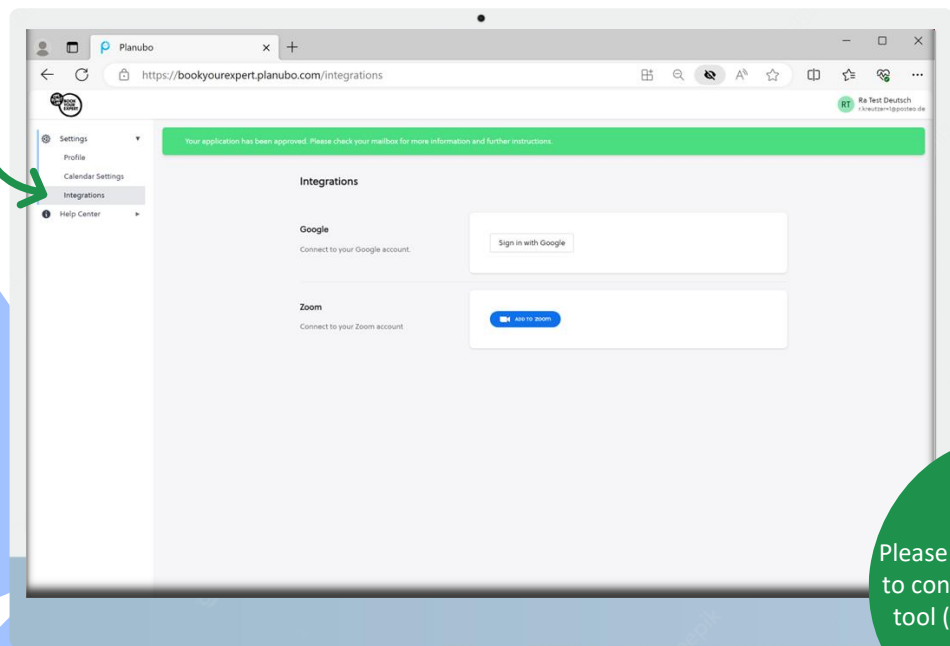
Important...

- Existing tags are shown – **please select tags in your language.**
- **Missing a tag? Please let us know by email** and do not add tags yourself.
- Do **not change** the table settings.

04

Connect your VC tool

Connecting your VC tool (1/5)



Please go to integrations to connect with your VC tool (Google or Zoom)

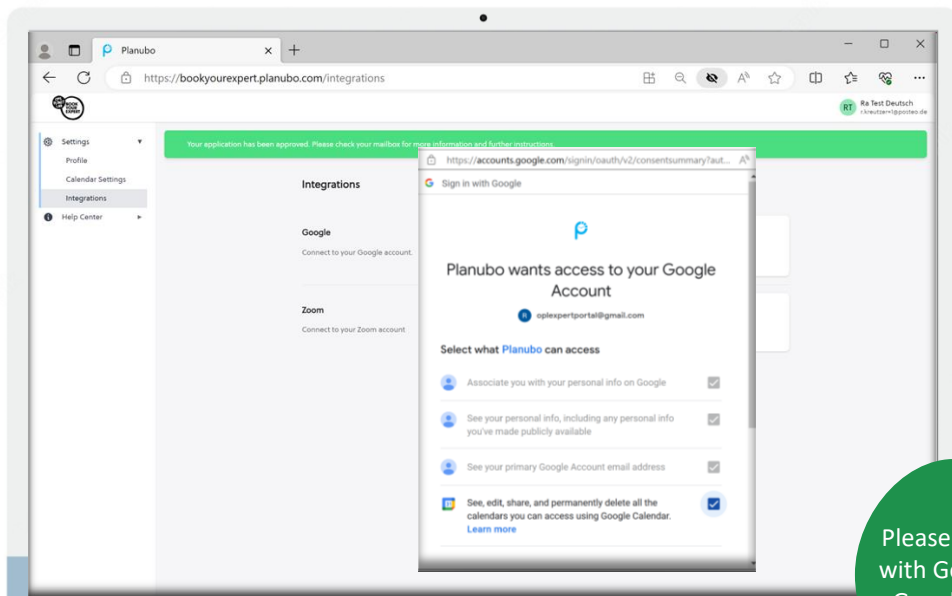
Connect with Google and/or Zoom

- Go to **“Settings”** > **“Integrations”**
- **Connect** to your Google and/or Zoom account
 - **Connect with Google** for using Google Meet as VC tool and for syncing your calendar
 - **Connect with Zoom** if you would like to use Zoom as VC tool

Important...

- Connecting to either Google Meet or Zoom is **obligatory to ensure that an automated link is created for each meeting.**

Connecting your VC tool “Google” (2/5)



Please connect with Google for Google Meet

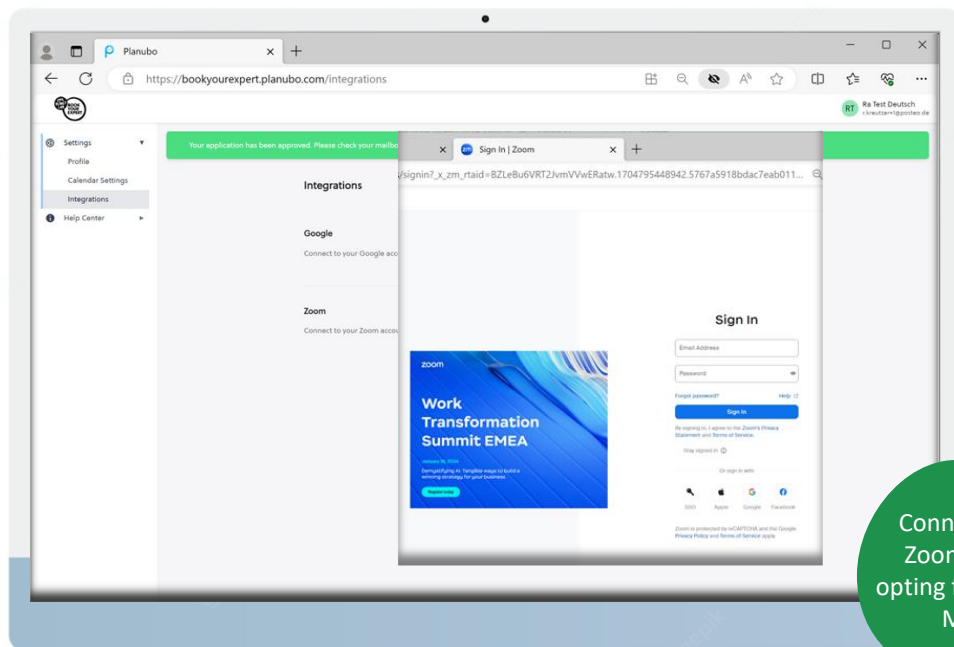
Connect with Google for Google Meet

- **Sign in** with Google
- **Accept** all settings incl. “See, edit, share, ...” so that two-way syncing is possible

Important...

- Once done, your Google account is connected, and Google Meet is setup.
- For **syncing your Google calendar**, a few more steps are needed.

Connecting your VC tool “Zoom” (3/5)



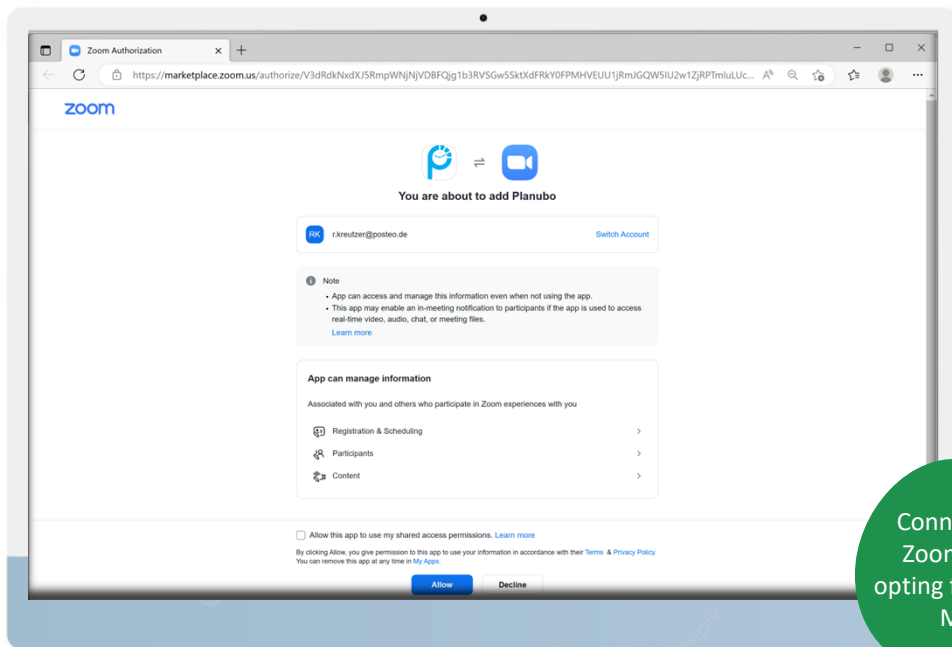
Connect with Zoom

- Add to Zoom
- Log in to your Zoom account

Important...

- If you would like to use Google Meet, you do not need to connect with Zoom

Connecting your VC tool “Zoom” (4/5)



Connect with Zoom (if not opting for Google Meet)

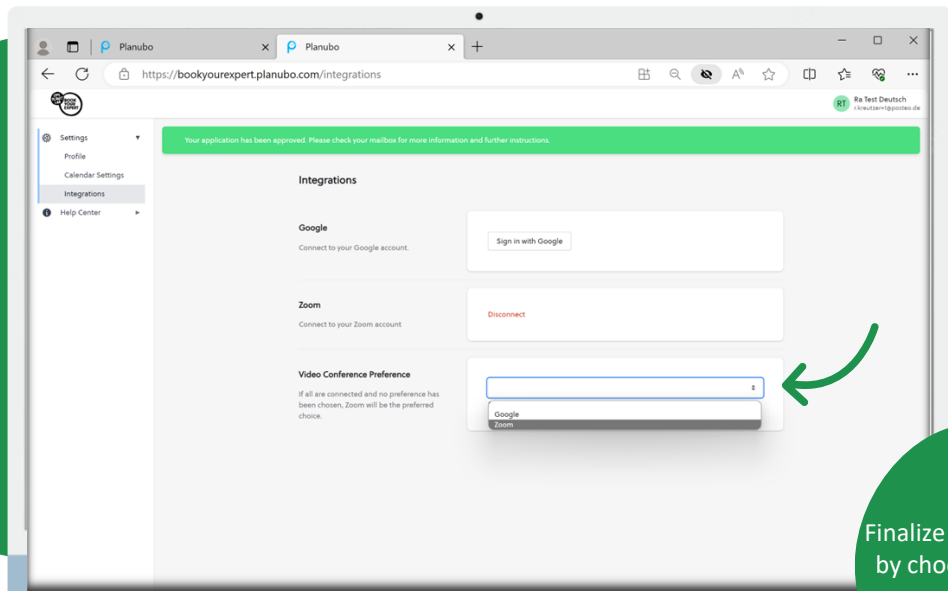
Connect with Zoom

- Allow

Important...

- You **do not need to “Allow this app to use my shared access permissions”**. **Date exchange** between Planubo and Zoom is **limited to the meeting date and link** (new link for each meeting).

Connecting your VC tool (5/5)



Finalize your VC settings by choosing Google or Zoom

Set your “Video Conference Preference”

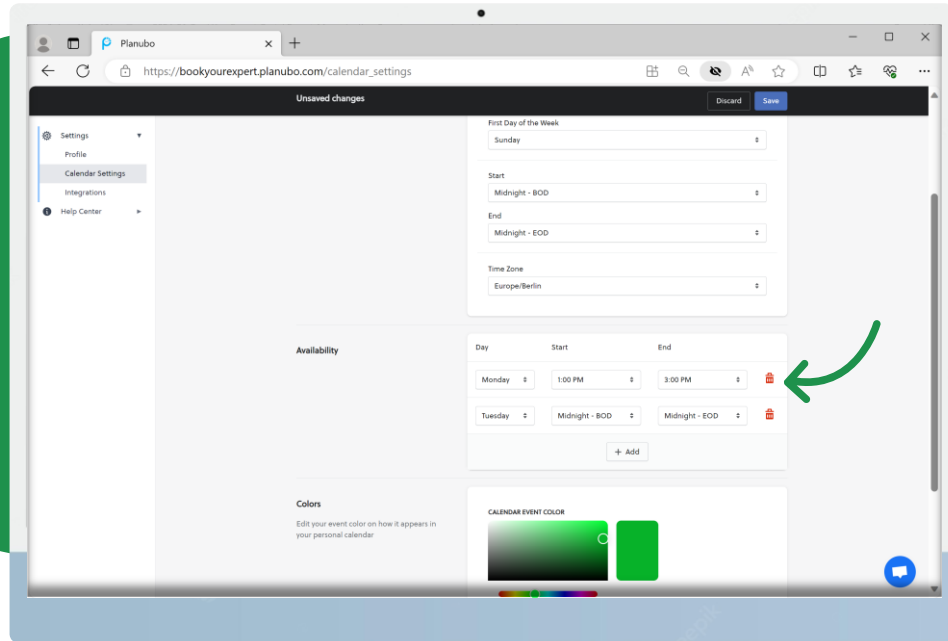
- **Select either “Google” or “Zoom”** under Video Conference Preference once connected to your account

Important...

- If you connected your Google account, choose Google
- If you connected your Zoom account, choose Zoom

Setting your availabilities

Setting your general availability



Set your general availability

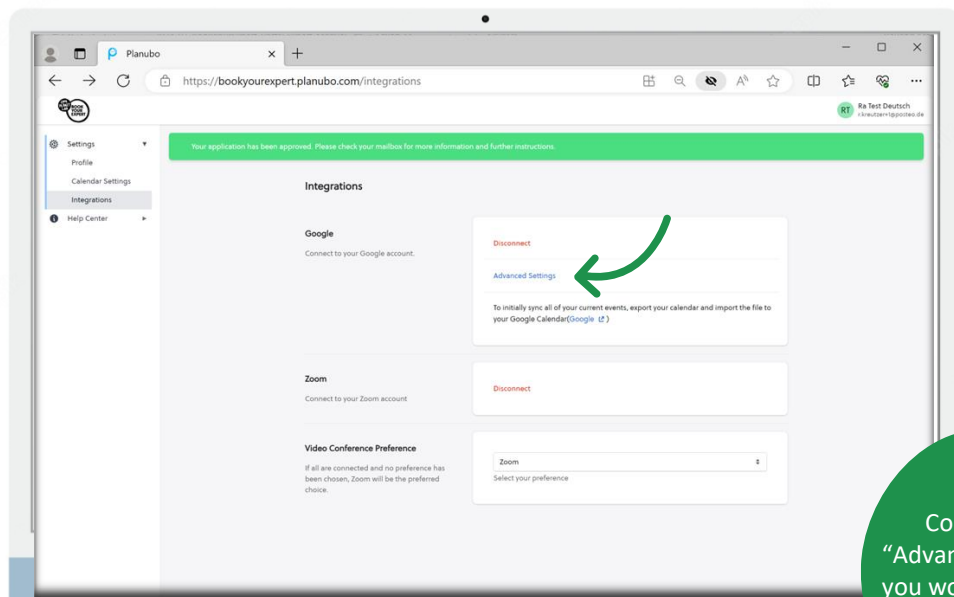
- Click on Settings > **Calendar Settings** > **Availability**
- Set your **weekly availability**

Important...

- Please do not change “**calendar details**”
- Will you sync your Google calendar? **Make sure to set your working hours**
- Do you opt for fixed availabilities? **Make sure to set at least 2 hours time range.**
- If your **week schedule changes**, you **can block time manually** in your calendar so that portal users cannot book sessions anymore.

Syncing your Google calendar (optional)

Syncing your Google calendar (optional) (1/2)



Continue with
"Advanced settings"
if you would like to sync
your Google calendar

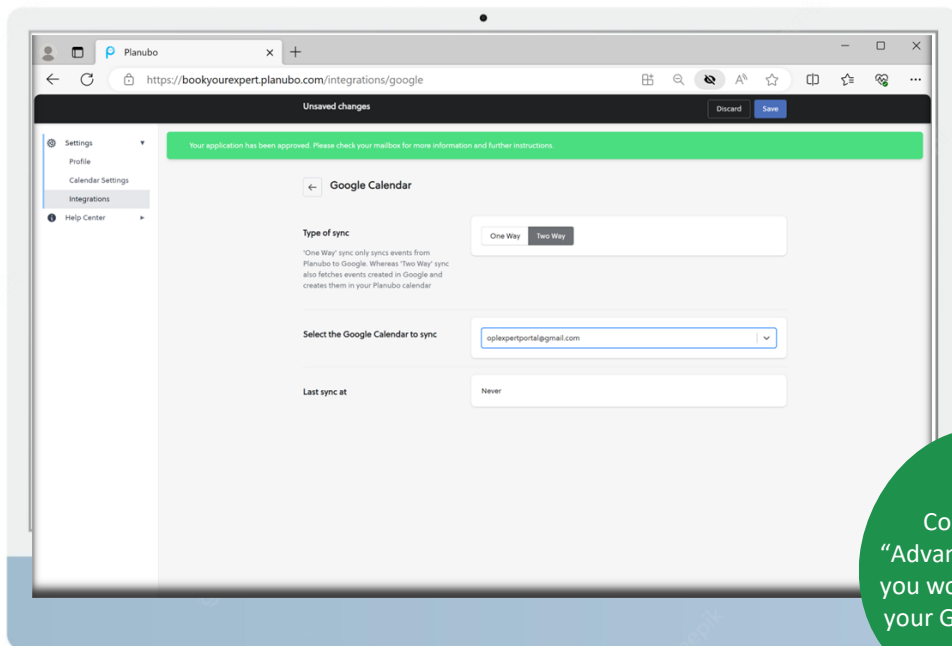
Sync your Google calendar

- Sign in with Google (if not yet done)
- Go to "Advanced Settings"

Important...

- If you opted for "fixed availability", there is no need to sync your Google calendar

Syncing your Google calendar (optional) (2/2)



Continue with “Advanced settings” if you would like to sync your Google calendar

Sync your Google calendar

- Activate “**Two Way**” sync
- **Select your calendar** (you can only choose one!)
- Save

Important...

- All-day events (e.g. holidays) are **not synced** and must be entered **separately** in the Planubo calendar
- Check your “Calendar” to see your **synced appointments** (all events shown as “busy”) – can take a few min
- **Make sure to set your standard working hours** (all free slots in this time range will be shown as available)
- Please follow [these instructions](#) in case you would like to sync your Google calendar with icalendar.

Workaround Google Sync

Some experts use Outlook and are therefore currently unable to synchronize their calendar with the portal. As a workaround, an additional, arbitrary Google account could be used to enable synchronization with your Outlook account and make it easier for portal users to find appointments. Advantages: Appointments from your Outlook would be displayed in your BookYourExpert calendar and customers could book free slots (instead of fixed availabilities). Steps needed:

- Create/use a Google Account
- Give this Google account permission for your Outlook calendar. To do this, select the calendar in Outlook and go to "Sharing permissions" and add the Gmail address (see also [here](#)).
- A confirmation email is sent to the Gmail address ("I'd like to share my calendar with you"). Copy the URL link ("this URL") from this email, go to "Add calendar - from URL" under Gmail Settings and paste the link.
- The calendar created in Google and synchronised with Outlook can then be selected for synchronisation in the BookYourExpert portal. Afterwards, Outlook appointments are also displayed in the BookYourExpert portal as "busy" (without details) and customers can book free slots.
- If you have previously set fixed availabilities, these must be adjusted to your regular working hours (e.g. 8 a.m. to 6 p.m.) so that free slots are displayed in this period.



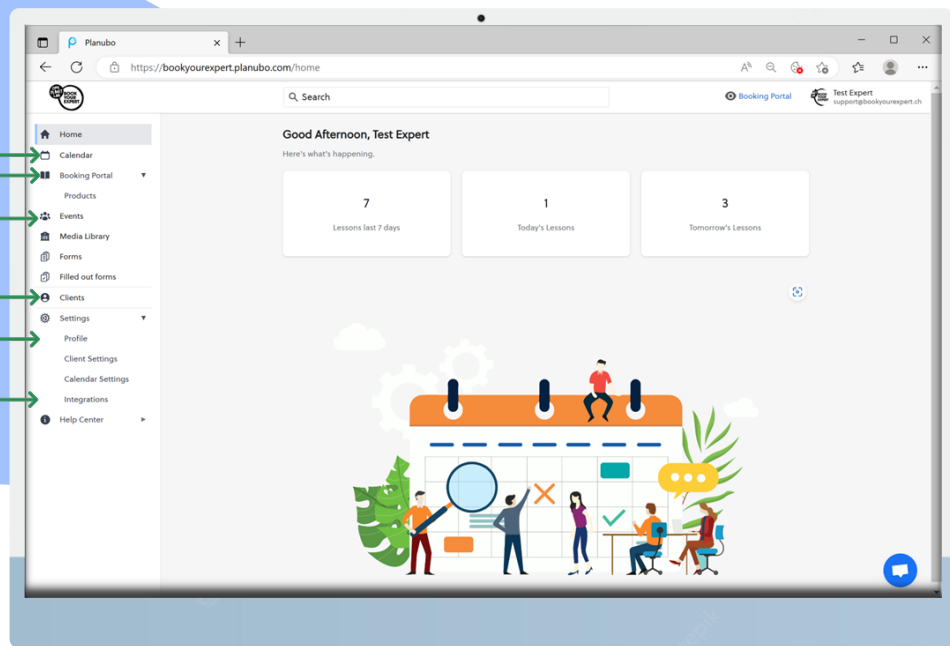
Congrats, your profile is set up!

Please wait a moment
while we activate your
profile, check your
mailbox and log in again

07

Once your profile is live

Your portal view, once live



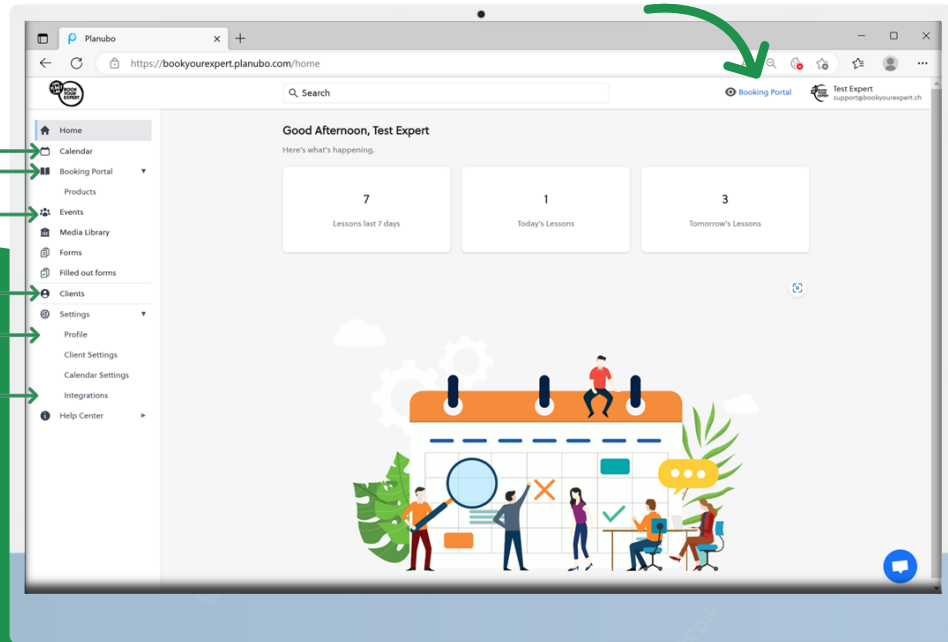
Relevant member settings & sections

- **Calendar** to view and manage appointments
- **Booking Portal** to adjust your availability for specific session if required
- **Events** to see your list of bookings
- **Portal users** to view a list of persons that have booked sessions with you
- **Settings – Profile** to edit your profile
- **Settings – Integrations** to connect with Google (sync your calendar and Google Meet) and Zoom

Important...

- Other sections can be ignored for now

See your profile live



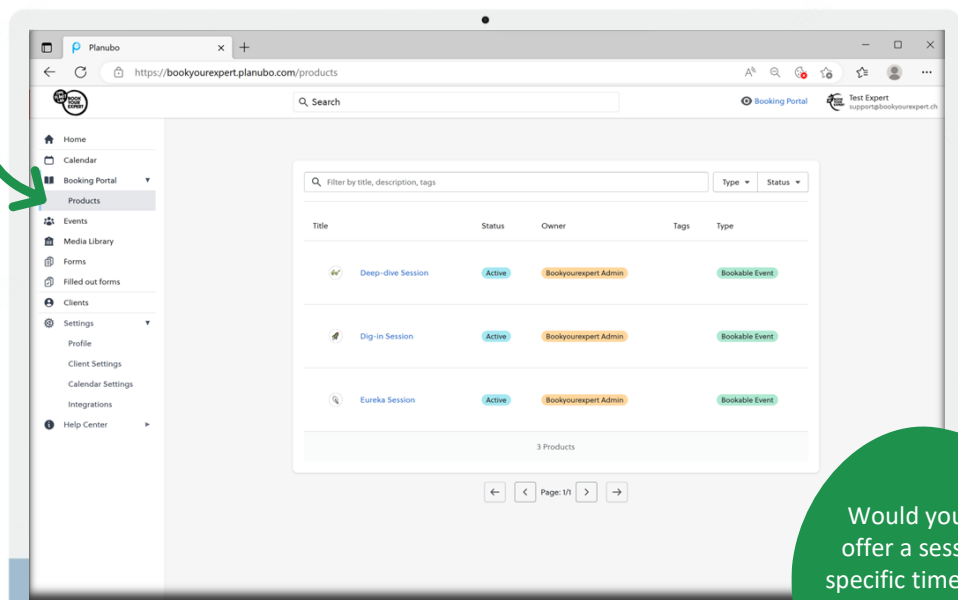
Change view

- You can change to the actual “**Booking Portal**” by clicking on the upper right icon
- This will allow you to **see all expert profiles live** including your own profile

Important...

- Please do not proceed with booking a session with another expert. With **your expert account you cannot book sessions.**

Setting product specific availabilities (1/2)



Would you like to offer a session at a specific time (and not as stated in your general availability)?

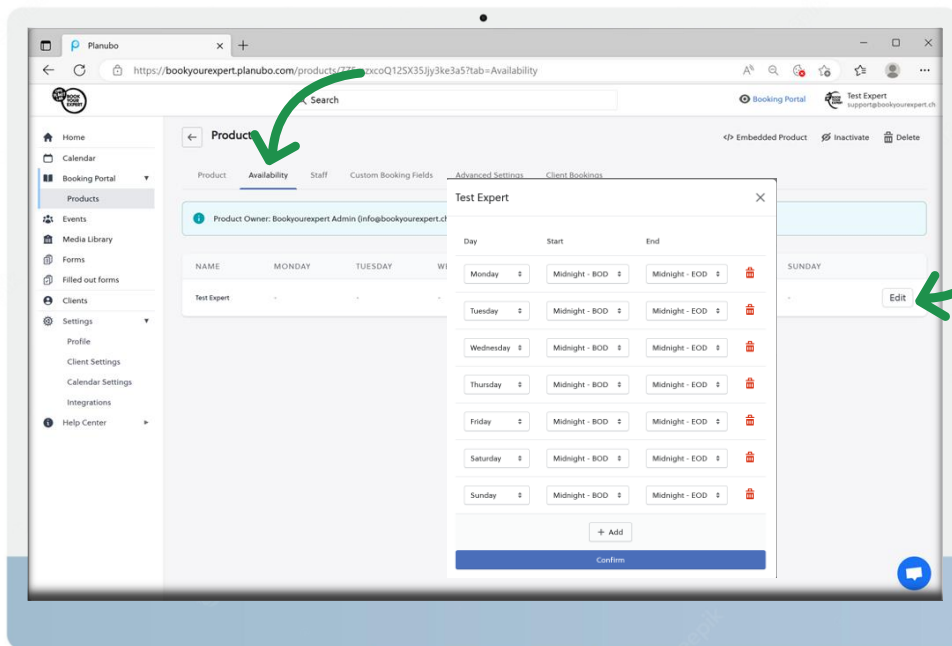
Adjust a product specific availability

- Click on **“Booking Portal”** and select one product
- E.g. Click on the Product **“Deep-dive Session”**

Important...

- This can be useful if you want to limit your availability for a particular session. For example: if you only want to offer a pro bono session for one hour per week.

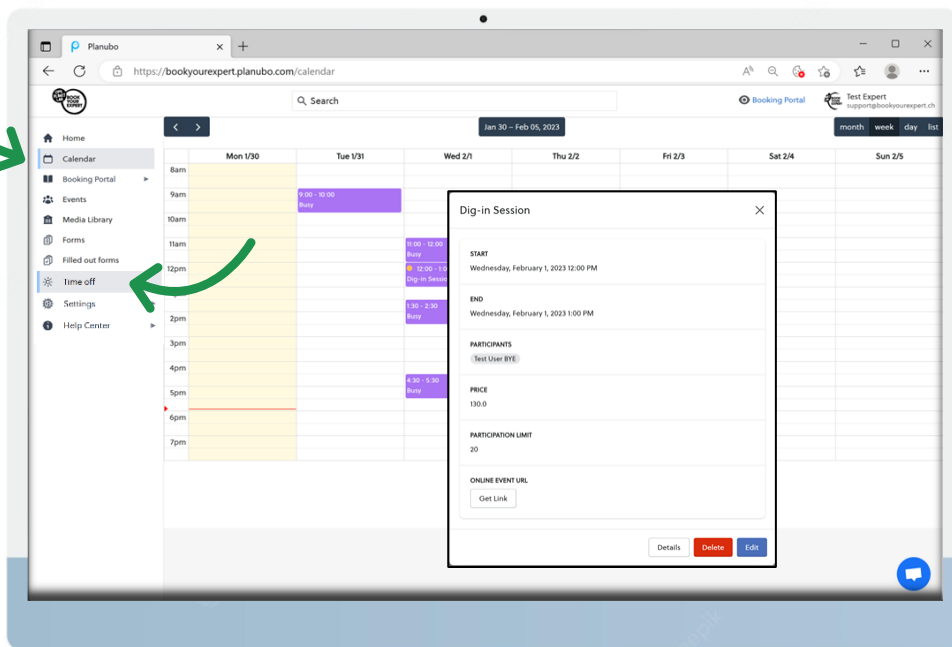
Setting product specific availabilities (2/2)



Adjust a product specific availability

- Click on **“Availability”**
- Click on **“Edit”** to change in pop-up window
- If desired, go back to the other products & repeat this step

Managing your calendar



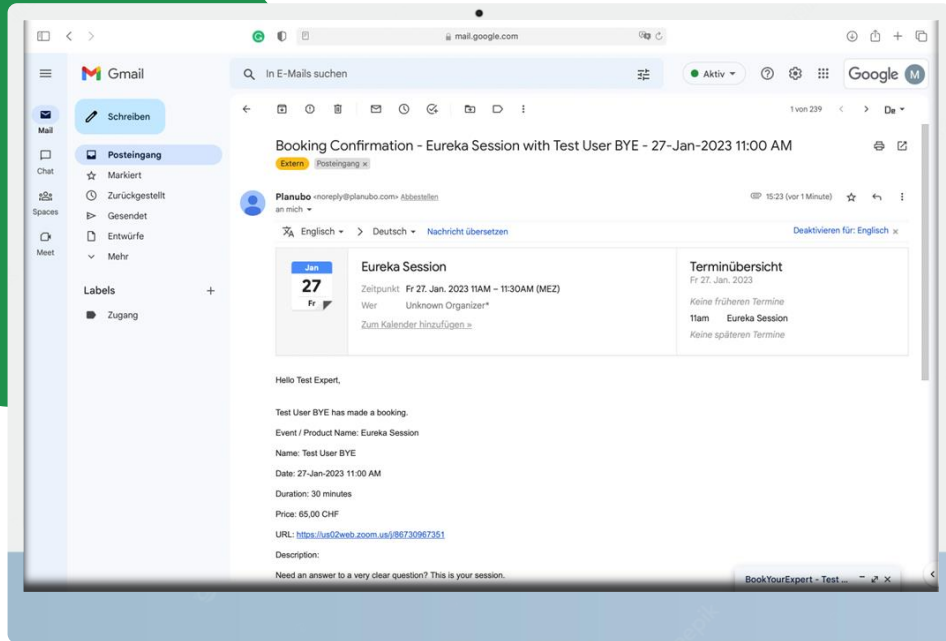
Calendar view

- Click on **“Calendar”** to see all of your events. Click on the event to see more details
- Use the **“Time off”** function for **blocking unavailable time** (e.g. vacation)
- Click on **“Settings” > “Calendar Settings”** to customize your calendar (e.g. to show weekends, change the first day of your calendar or choose a colour for events)

Important...

- Synced events are shown as **“busy”** (all events incl. those booked as free in your Google calendar)
- Other sessions are shown by their names

Receiving a booking



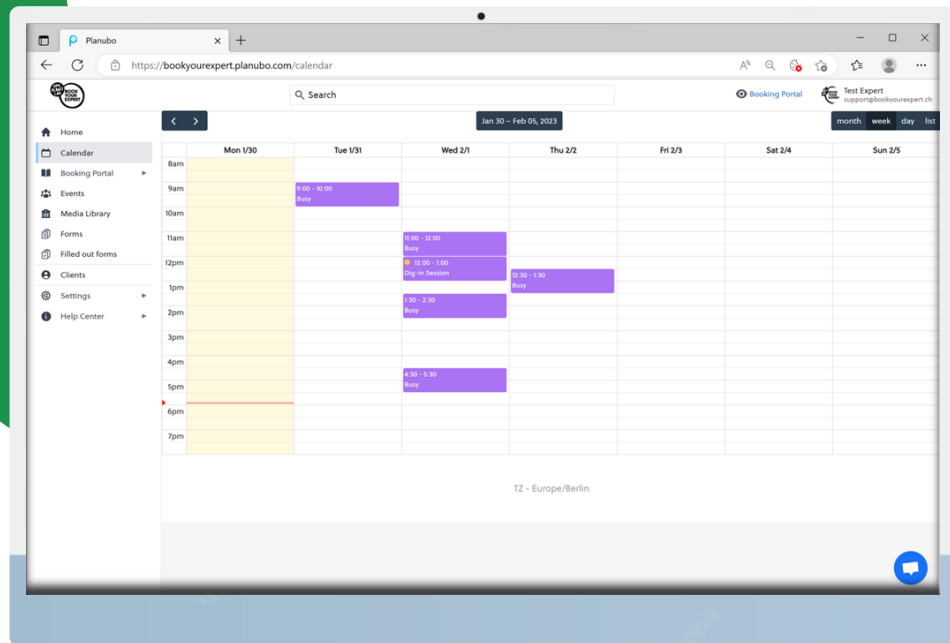
Notifications

- You will receive the booking confirmation via your registered email. Please add the appointment to your calendar (if not opted for Google calendar syncing)

Important...

- Please check your emails regularly
- Please make sure you receive emails by **noreply@planubo.com**

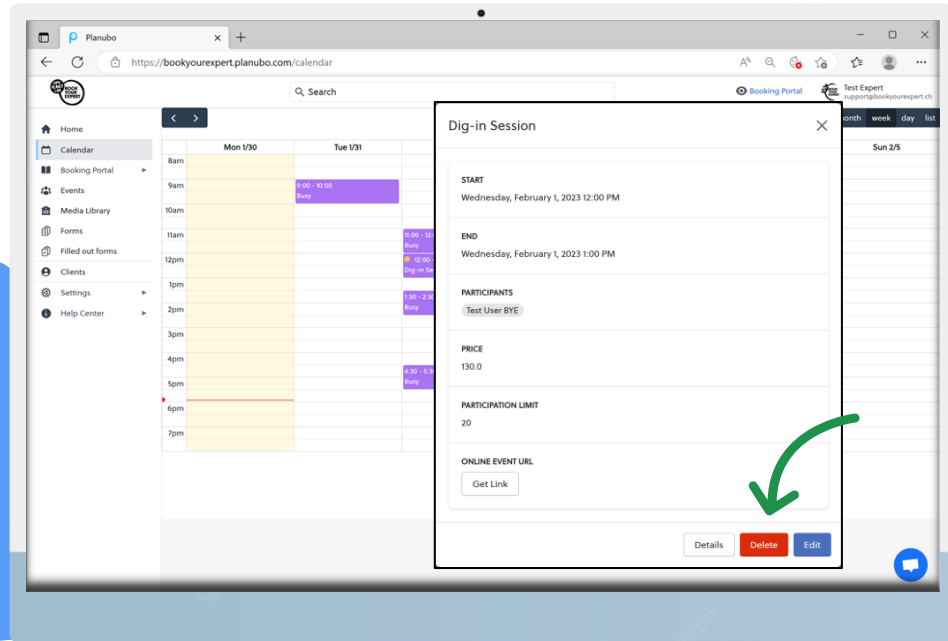
Amending a booking (1/3)



Basic amendment rules

- Bookings, cancellations and amendments **latest 48hrs before the meeting**
- If you wish to amend a booking, please **reconcile with your portal user beforehand** (email provided in booking confirmation) to avoid rescheduling!
- Booking amendments initiated by you are **not restricted to the hours you mentioned as fixed availabilities**.
- However, if a **portal user reschedules** the appointment, he/she needs to cancel the booking and reschedule by **finding an available time slot according to your set fixed availabilities or synced calendar**.

Amending a booking (2/3)



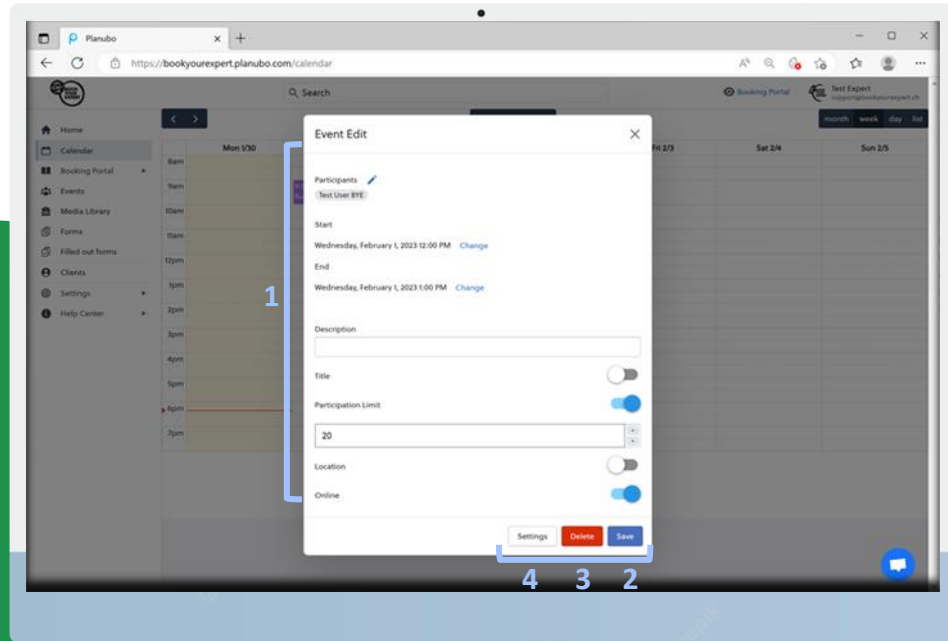
Amend a booking

- Click on the booking to get more details (Start & End Date / Time, Participants, Price).
- At the bottom, you have three options: "Details", "Delete", and "Edit"
- Proceed to "Edit" for amending the booking

Important...

- Bookings, cancellations and amendments latest 48hrs before the meeting

Amending a booking (3/3)



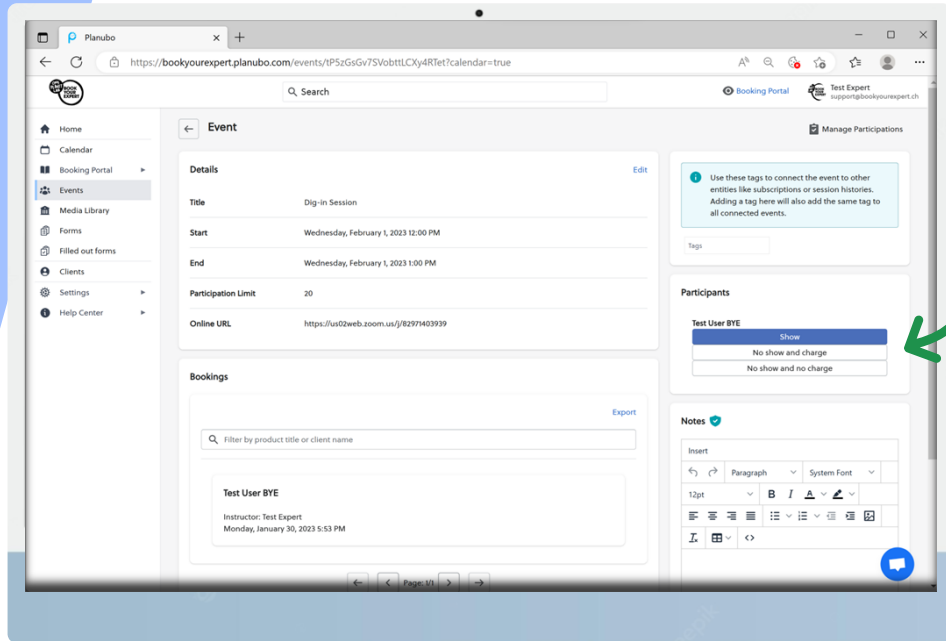
Amend a booking: Adjust time or delete

- Click **"Edit"** and change to the desired time of your session (do not change time range).
- Click **"Save"** to save your edits. A push notification will then pop-up. Please notify your participant.
- Click **"Delete"** and confirm to delete the event. A push notification will then pop-up. Please notify your participant.
- By clicking on **"Settings"** you will be guided to the event details (see next slide).

Important...

- **Only change to "Location"** if agreed with your portal user to meet in person (no VC link will be attached to booking confirmation).
- Please **do not adjust preset "Title"** and **"Participation limit"**
- If you change the desired time, please **make sure 30/60/120 min time range is not changed**

Booking details & no shows



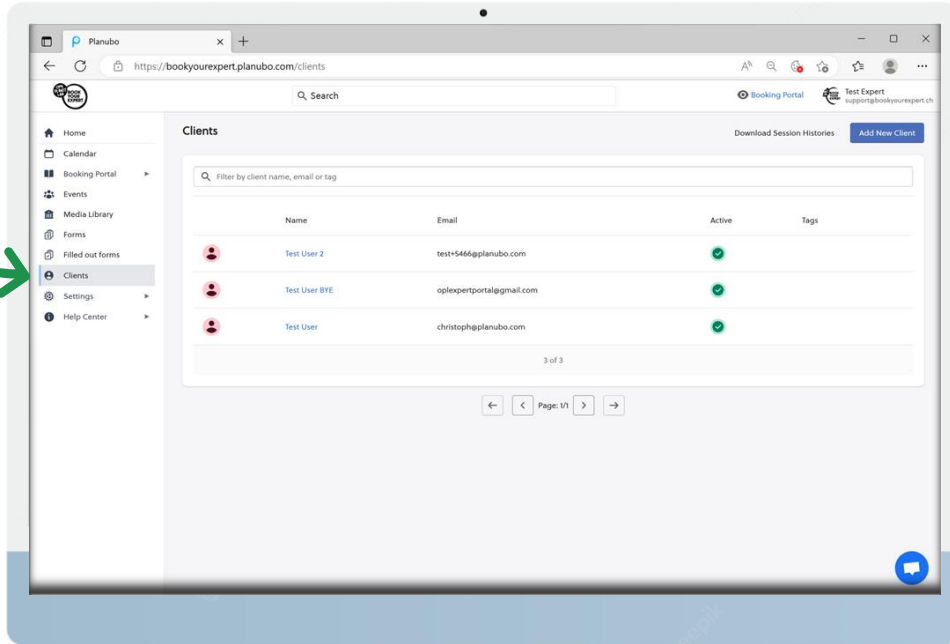
Booking details

- By clicking on "**Details**" you see more information about your bookings.
- You may record whether the participant joined the meeting or not.

Important...

- Bookings, cancellations and amendments **latest 48hrs before the meeting.**
- If the participant **cancels less than 48 hours** before the meeting, the session is automatically considered as **no show & charge.**

Portal users



Overview of portal users

- Click on **“Clients”** to get an overview over portal users who have booked sessions with you
- By clicking on a portal user name, you will get more information about him/her

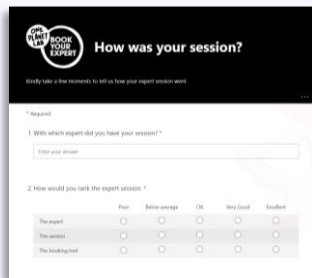
Important...

- **Only portal users who have booked sessions with you** are visible.
- Project teams often consist of few members who might join the call together.
- Portal users range from sustainable accelerator and other support programmes to our open community.

Providing and receiving feedback

Feedback about your sessions

- Each participant will **receive a feedback survey after your session**



How was your session?

Helpful tips & how to access to all of free your expert sessions

1. With which expert did you have your session? *

Enter your answer

2. How would you rank the expert session? *

	Poor	Below average	OK	Very Good	Excellent
The expert	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The content	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The teaching tool	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Your experience

- Please let us know your feedback anytime.
- Join our onboarding calls for questions or personal feedback
- Occasional feedback surveys and bilateral calls

Invoicing and payment

For payment, please provide one consolidated semi-annual invoice for all expert hours provided at the end of June 2024 and the end of December 2024 (for sessions that took place till then) to:

Patricia Matzdorf
WWF Switzerland
Hohlstrasse 110
8010 Zürich
(via email to support@bookyourexpert.ch)

All invoices must:

- be sent **in the name of an association or company.**
- Or as a **formally self-employed** person with **proof of AHV.**

Expert hour rate: between **CHF 130 and CHF 160 excl. VAT. depending on user group.** For details and the basis of your invoice, please refer to your list of bookings and list of clients. Only expert hours referring to clients with the tag **"Business Booking Portal"** can be charged at the higher rate.

Important...

The invoicing process is being facilitated through the portal so that consolidated invoices are paid twice a year. No direct payments between portal users and experts. Portal users pay with vouchers, which are billed separately.

Are you featured as an expert on an **exclusive programme booking page** ("Branded Space") as part of a **partnership? Please check the invoicing details with the BookYourExpert und Partner team.**

Your checklist

- ✓ If applicable, send us your AHV proof via email
- ✓ Is your profile ready?
 - ✓ Log in and review your profile
 - ✓ Set your availabilities
 - ✓ Sync your calendar with Google (optional)
 - ✓ Connect with Google Meet or Zoom for Videoconferencing
- ✓ Send your consolidated by-annual invoice
- ✓ Give your feedback anytime

Spread the word



- Follow us on [LinkedIn](#)
- Tell your community about BookYourExpert – maybe in your next SoMe Post or company newsletter?
- Would you like to be featured in our communication and share your **testimonial**? Please complete this [form](#).
- We offer the new promotional format “**Expert Speed Dating**” This spring we will host two Speed Dating Events for experts and sustainable project leads– one virtual and one in-person in Zürich. Are you interested in being part of either of these events and showcase your expertise? Please [register here](#).
- Questions regarding Communication? Interested in being featured? Please contact our team.



Your contacts

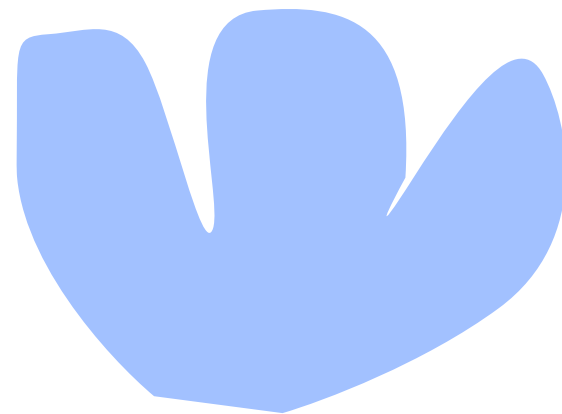


For confirming your profile and general questions:

- Support@bookyourexpert.ch (Riccarda)
- Info@bookyourexpert.ch (Rauand)

For technical support, e.g. log-in, syncing issues, etc.:

- support@planubo.com (CC support@bookyourexpert.ch).



Meet the team



Rauand Kreutzer

Project lead

info@bookyourexpert.ch



Riccarda Schmid

Junior Manager

support@bookyourexpert.ch



Theres Kummer

Communications Manager

Theres.kummer@wvf.ch



Patricia Matzdorf-Gobeli

Partnerships & Strategic Advisor

Patricia.matzdorf@wvf.ch

Thank You!

We very much look forward to **enabling**
sustainable changemakers together with
YOU!