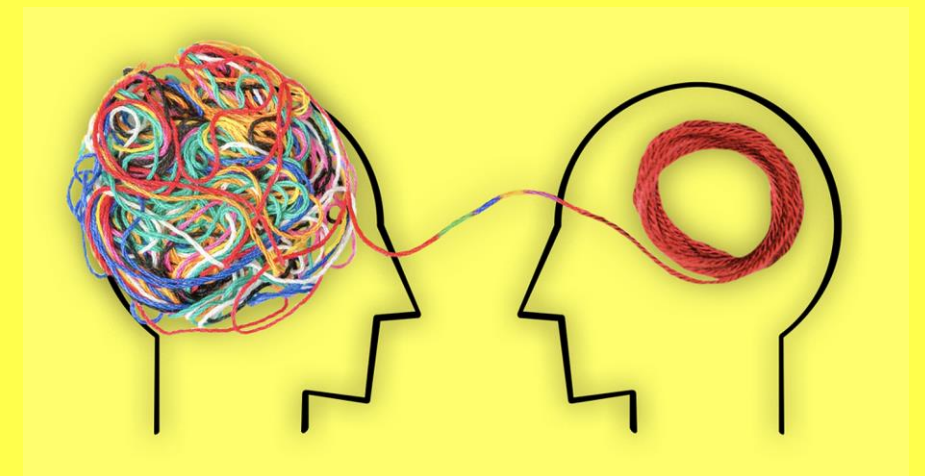




BookYourExpert

Expert Manual



Agenda

- 1 About
- 2 Log in
- 3 Check your Profile
- 4 Connect your VC tool
- 5 Setting your availabilities
- 6 Syncing your Google Calendar
- 7 Once your profile is live





1. About



Our Origin: One Planet Lab

A do-tank for resource-saving projects and pioneers

AVOID



REDUCE



Reise



RECYCLE



Rethink



Initiiert und gehostet vom WWF Schweiz

Unterstützt von der Mercator Stiftung Schweiz
und der Hamasil Stiftung



Hamasil Stiftung



The Context

Our Vision

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

Our Mission

The portal 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 (Q1-2025)

+100
Vetted Experts

+330
Booked expert
sessions

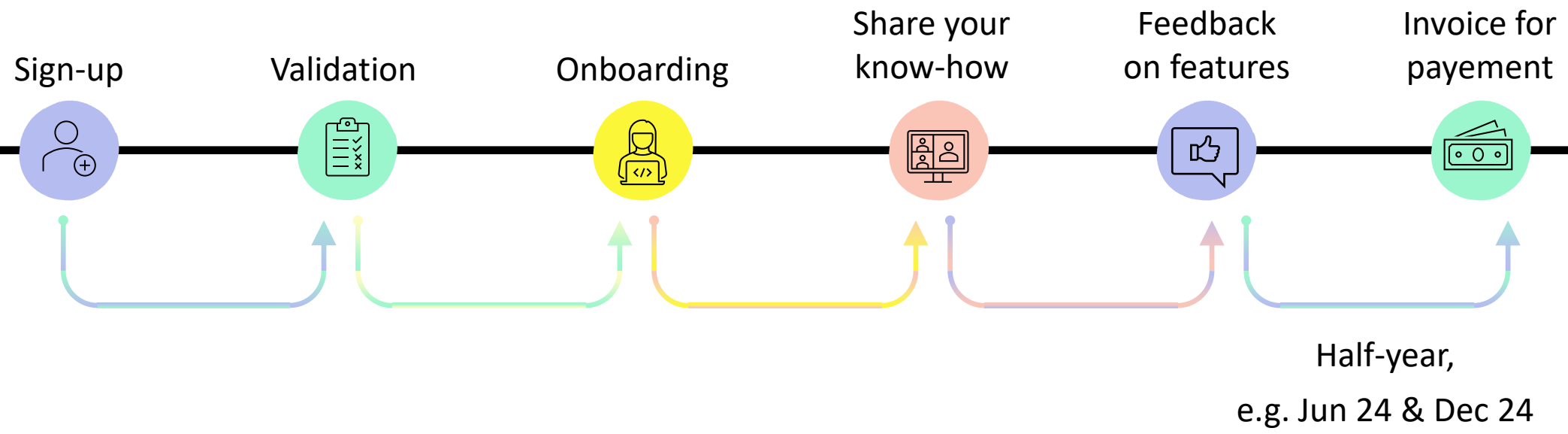
+120
Projects supported

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?





Important Participation & Booking Rules (1/2)

Our **new expert service agreement (DE; EN; FR) and general terms & conditions (DE; EN; FR) 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 **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.

Bookings can be made either through the **standard booking page** or through **exclusive programme booking pages** ("Branded Space"). The exclusive programme booking pages can be made available to a **specific group of portal users as part of a partnership.**

We offer **four standard sessions of varying length** including three payable (30', 60', 120') and one free (15') session. The standard rate is **CHF 130 excl. VAT** on the standard booking page or a **bilaterally agreed rate** for a Branded Space as part of a partnership model.

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, rescheduling and cancellation by portal users must be made at the latest **48 hours** before the meeting, unless otherwise agreed. The expert and the portal user may still agree on bilateral changes within 48 hours of the meeting, but 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:

(1)

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

If your **weekly schedule changes**, you can block off time manually in your portal calendar.

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

Booking changes you initiate as an expert are **not limited to your fixed availability hours** (e.g., Thursdays 3-5 pm).

However, if a **portal user needs to reschedule**, they will need to cancel the current booking and select a new time within your available hours.

(2)

Connect your Google calendar to allow two-way syncing.

This allows full flexibility, so portal users can book sessions with you whenever you are available.

This option is recommended if you have a single, **up-to-date Google calendar**.

You don't use Google calendar, but you still want to sync one calendar? Check out our **Google Sync Workaround** guide.



Our Expert Sessions

Standard

Optional

*Paid



EUREKA
(30')



DIG-IN
(60')



DEEP-DIVE
(120')

Pro bono



FIRST MEET
(120')



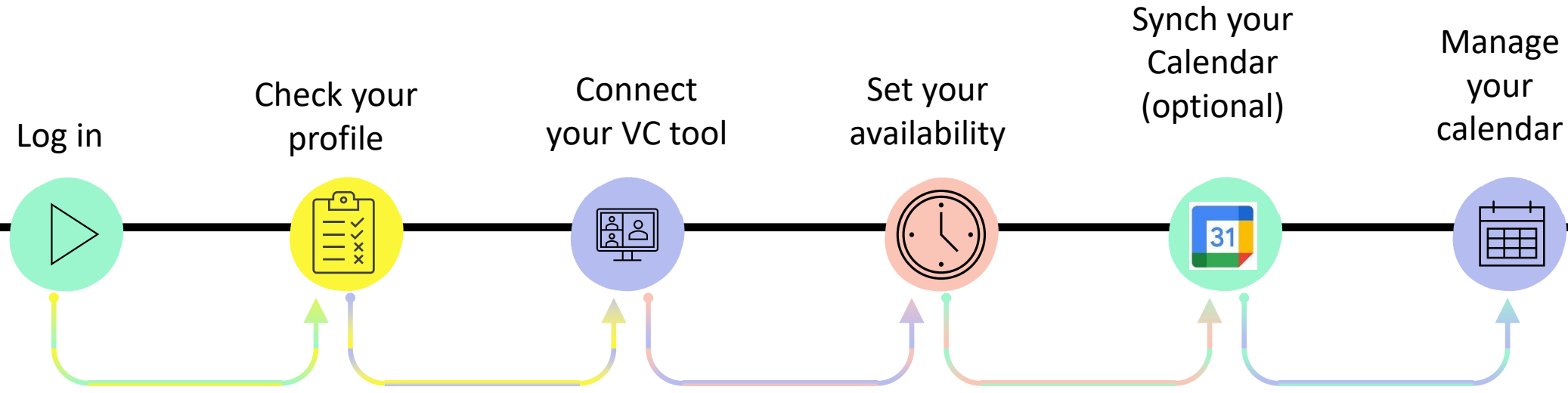
PRO BONO S
(30')



PRO BONO M
(60')

*Prices according to expert agreement is **CHF 130 excl. VAT** on the standard booking page or a **bilaterally agreed rate** for a Branded Space as part of a partnership model.

The steps: what to expect?



2. Log in



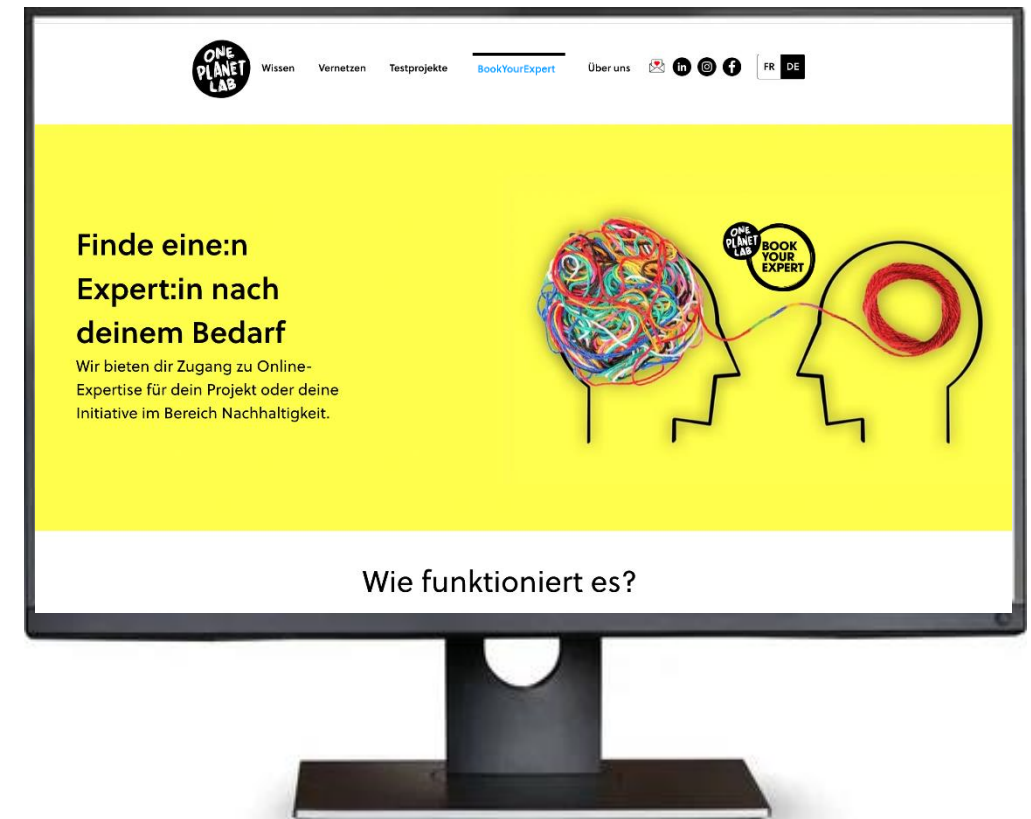
The website

Navigating the website

- Access the [One Planet Lab website - BookYourExpert](#)
- Expert profiles are **not public** – only accessible by users after log in
- **Save this direct link* for logging in as expert**
- Portal available in **German, English & French**

Important...

- When logging in you will be directed to our portal which is powered by our **technology partner Planubo.**





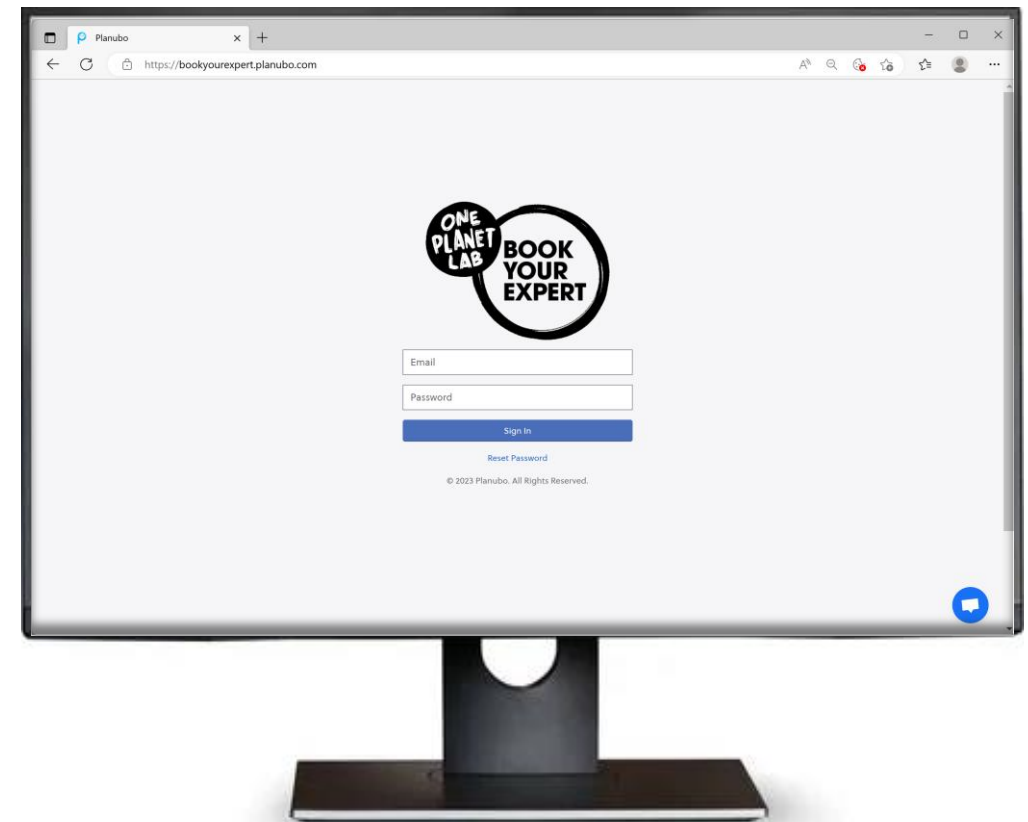
Logging in

Get started with your account

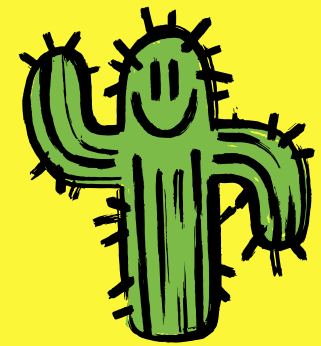
- Log into the portal with your **login details** from your registration.

Important...

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



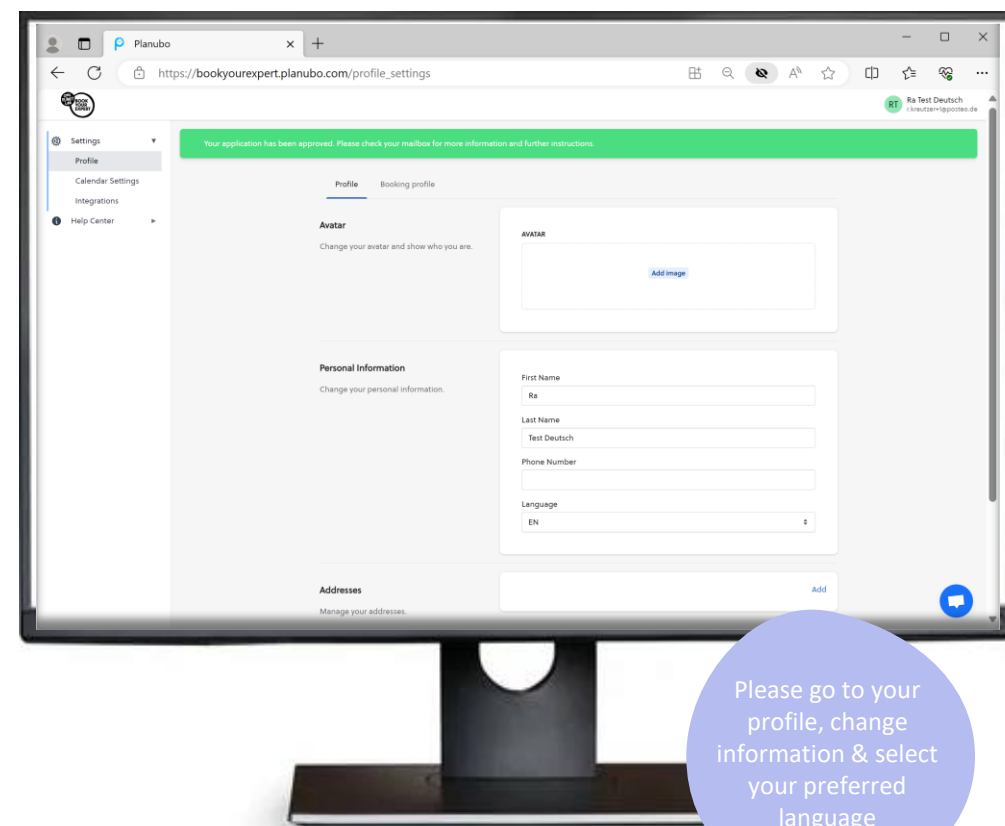
3. Check your profile



Changing your profile settings

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



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

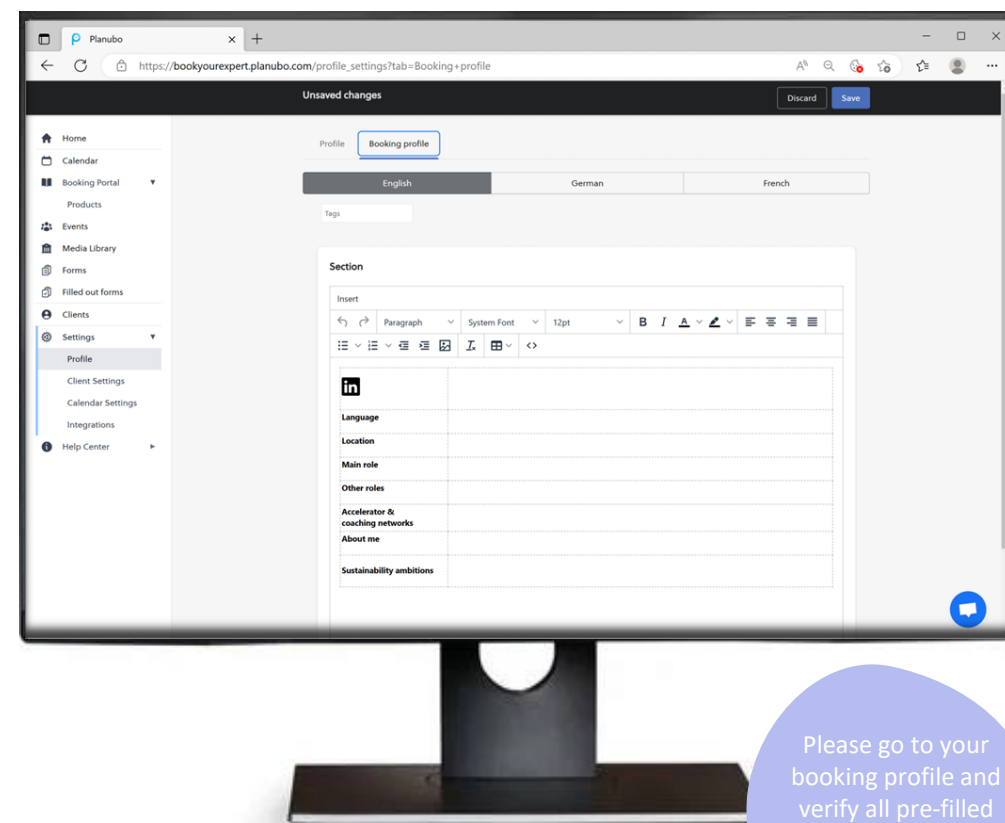
Changing your booking profile

Verify your profile

- Click on **“Booking profile”**
- **Add or remove tags**
- **Validate / change 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.



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

4. Connect your VC tool



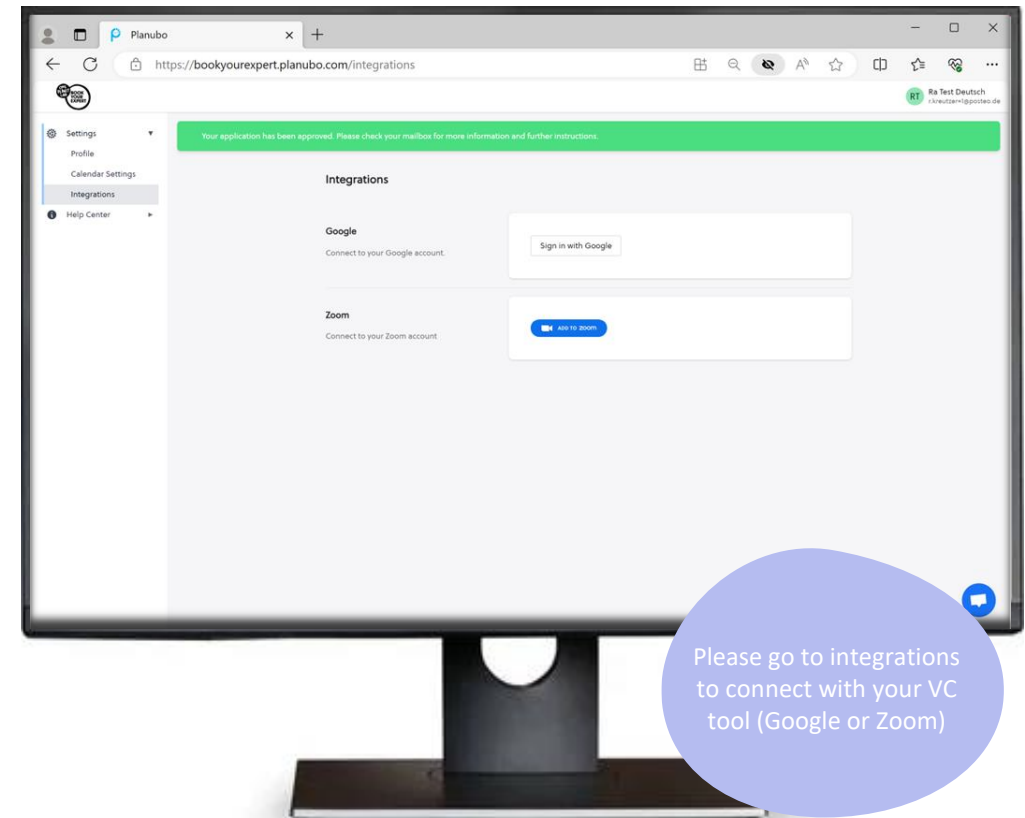
Connecting your VC tool (1/5)

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.**



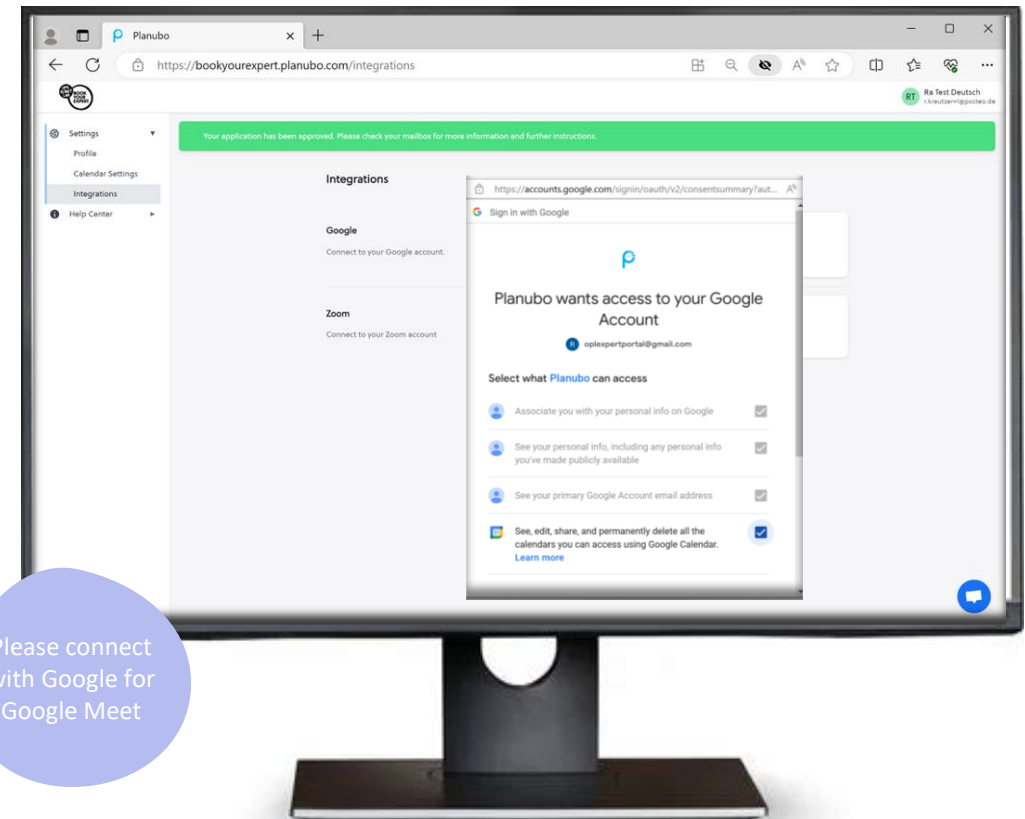
Connecting your VC tool “Google” (2/5)

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.**



Please connect with Google for Google Meet

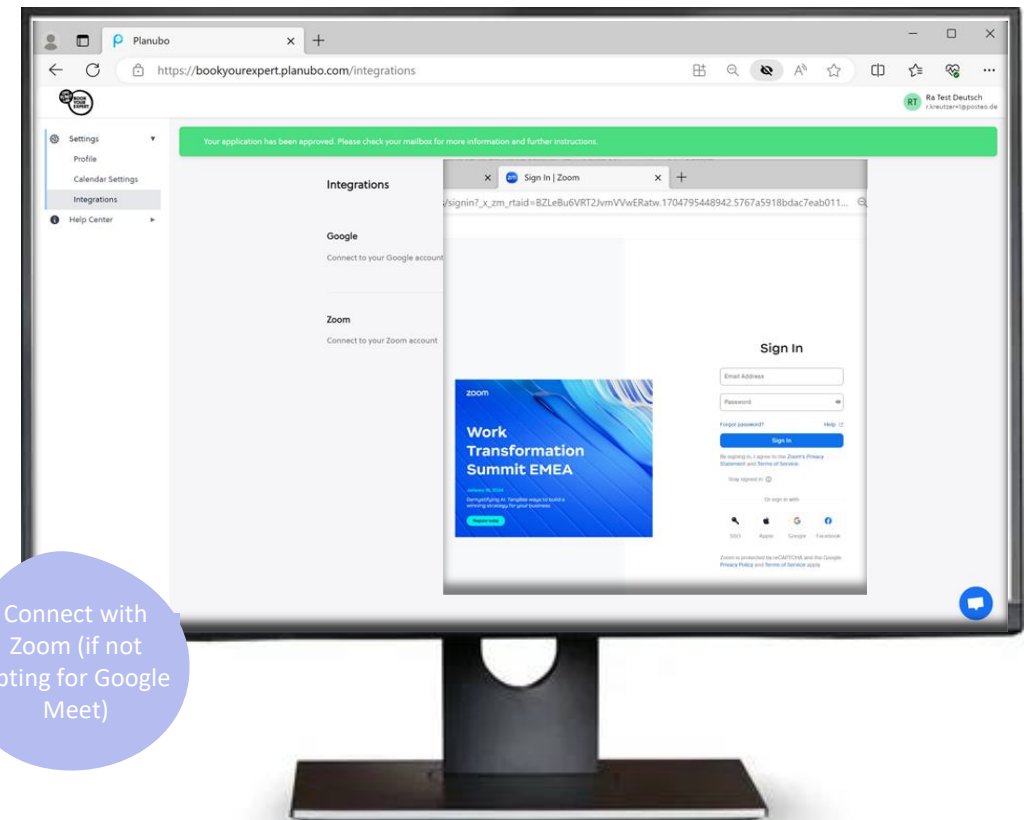
Connecting your VC tool “Zoom” (3/5)

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)

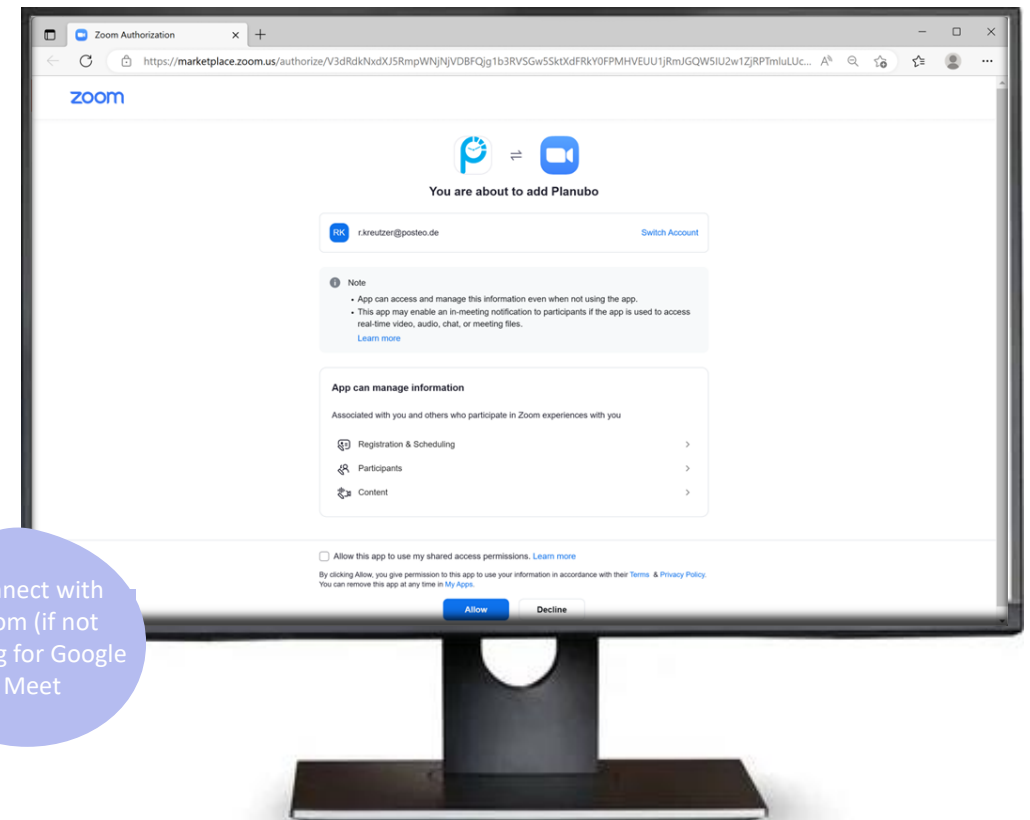
Connect with Zoom

- 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).

Connect with Zoom (if not opting for Google Meet)



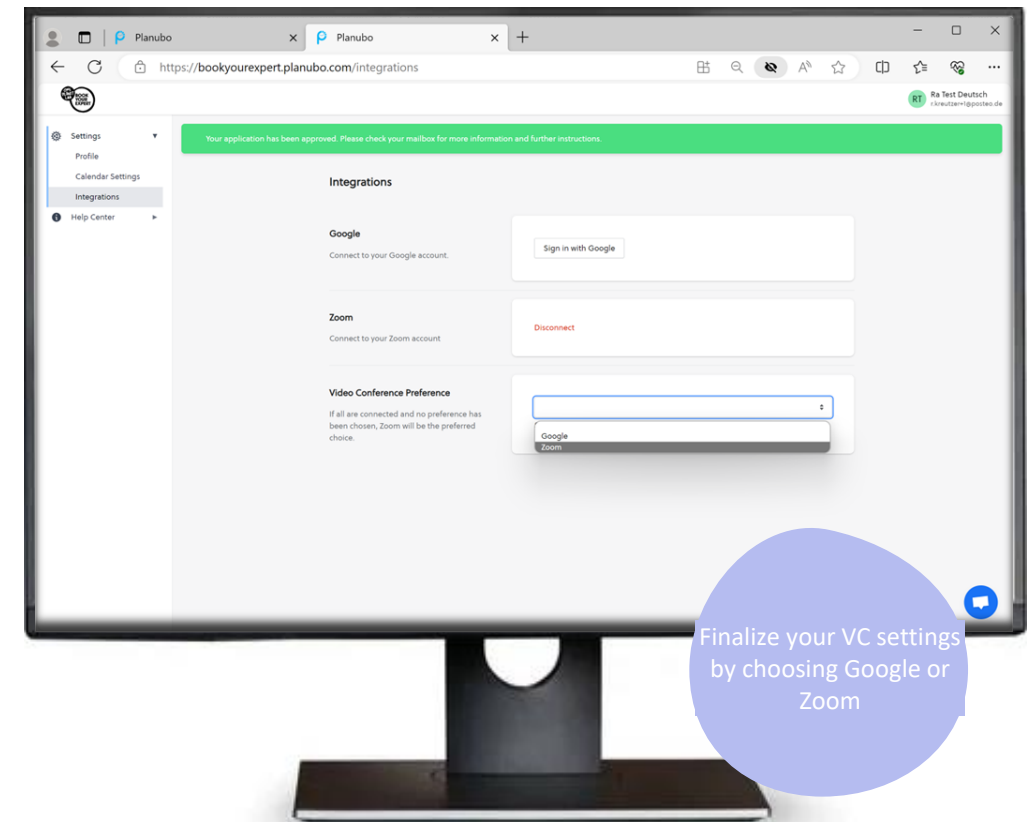
Connecting your VC tool (5/5)

Set your “Video Conference Preference”

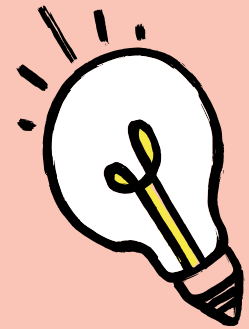
- **Select either “Google” or “Zoom”** under Video Conference Preference once connected to your account

Important...

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



5. Setting your availabilities



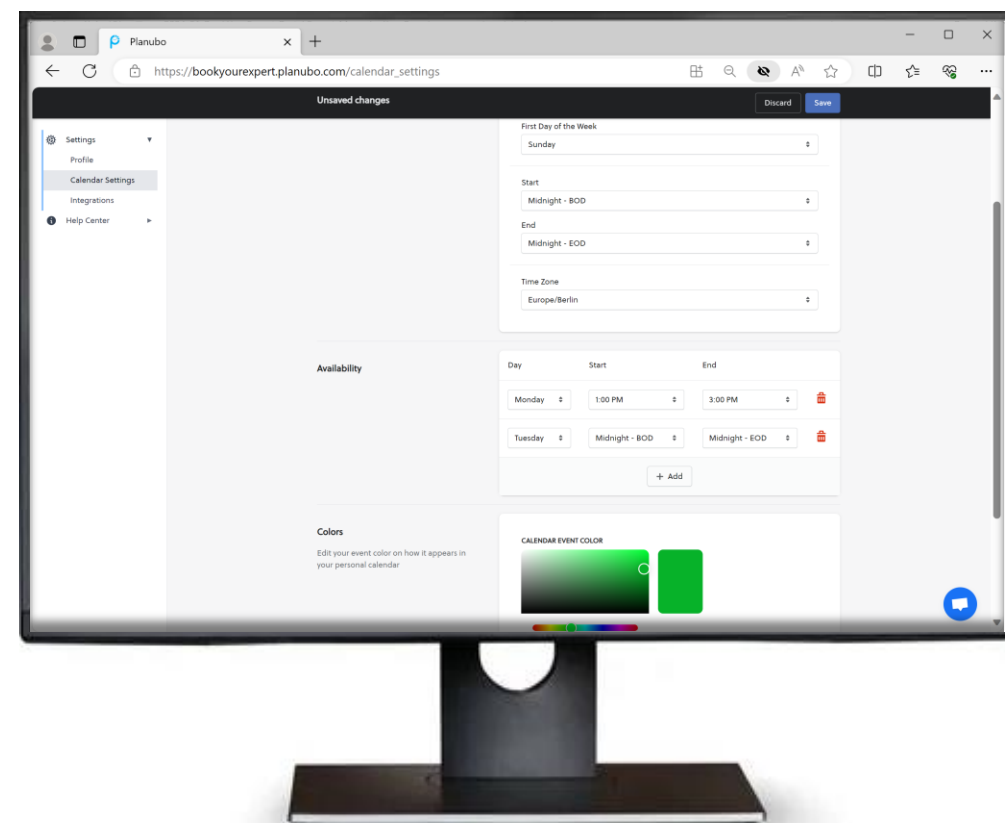
Setting your general availability

Set your general availability

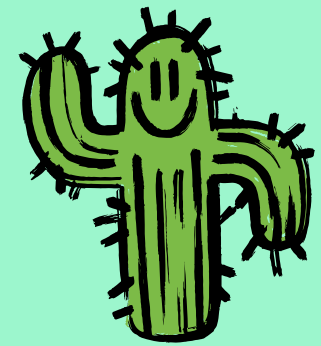
- Click on Settings > **Calendar Settings** > **Availability**
- Set your **weekly availability**

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.



6. Syncing your Google calendar (optional)



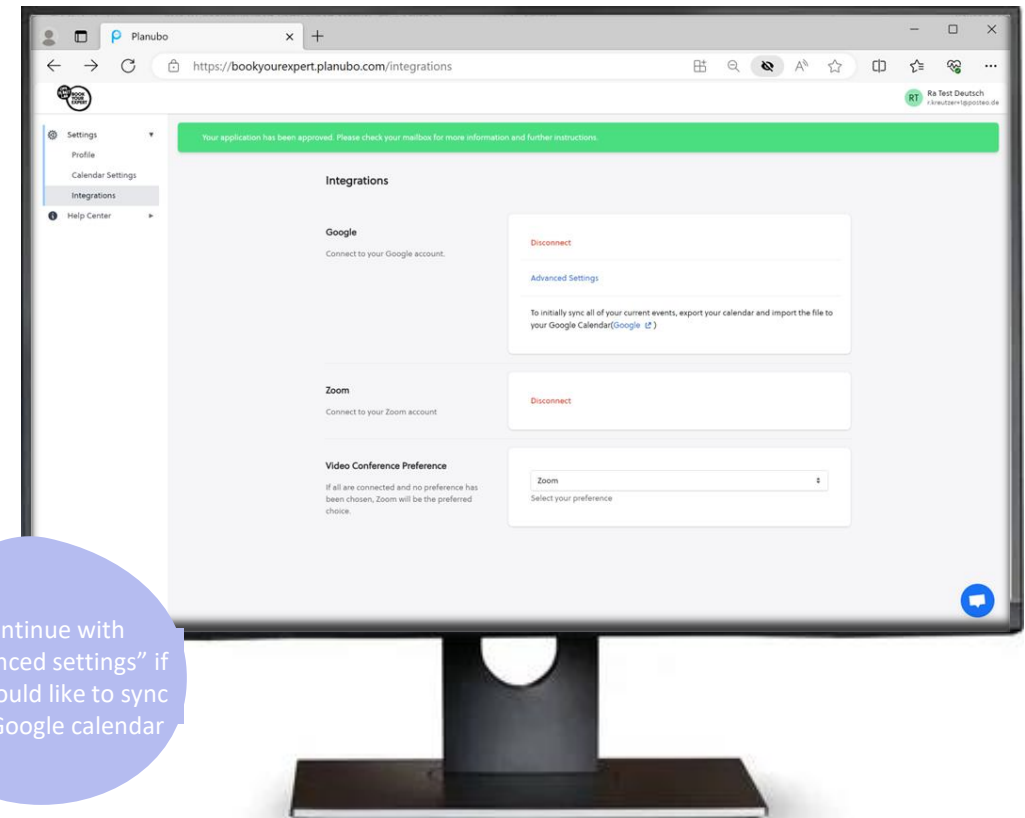
Syncing your Google calendar (optional) (1/2)

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**



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

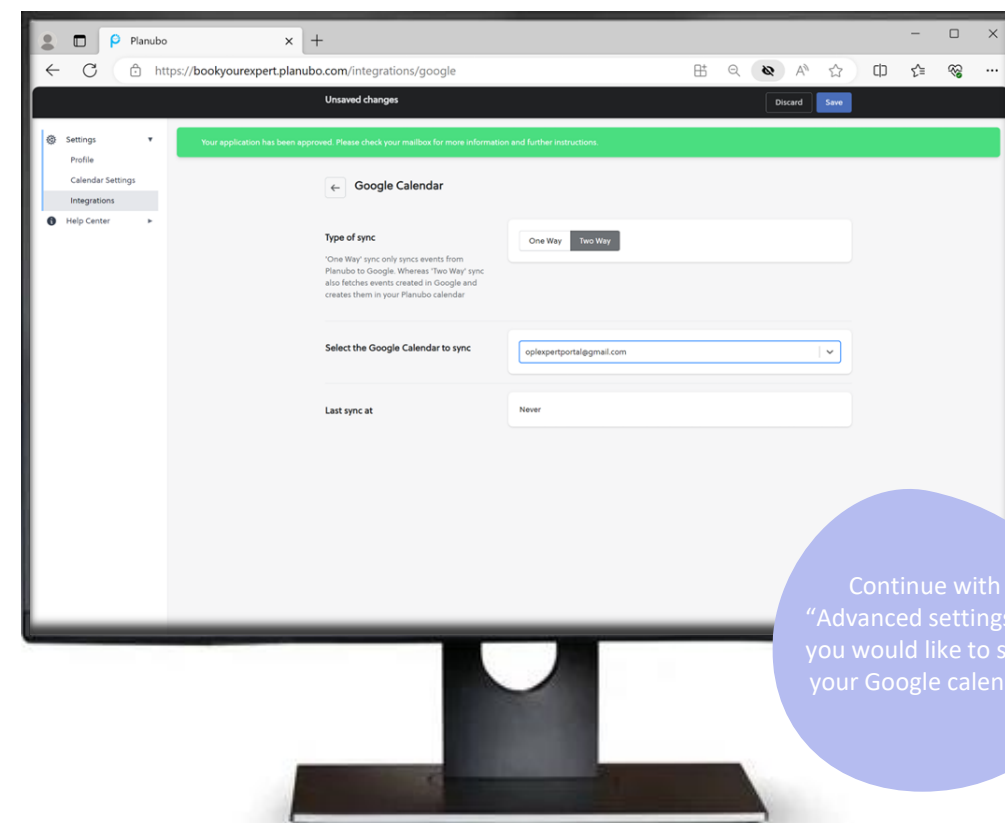
Syncing your Google calendar (optional) (2/2)

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.



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

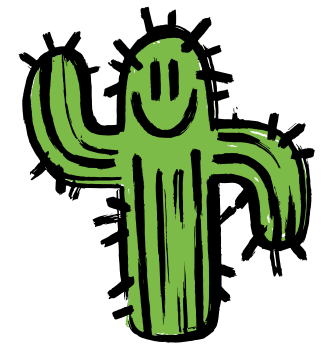
Workaround Google Sync

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:

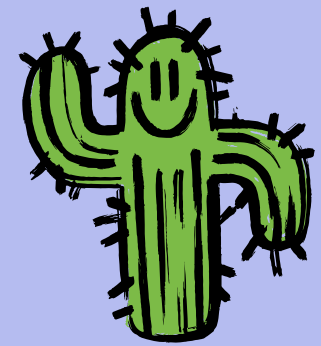
- Create/use a Google Account
- Give this Google account permission for your Outlook calendar. To do this, select the calendar in Outlook and go to "Sharing permissions" and add the Gmail address (see also [here](#)).
- A confirmation email is sent to the Gmail address ("I'd like to share my calendar 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.

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

Congrats, your profile is set up!



7. Once your profile is live



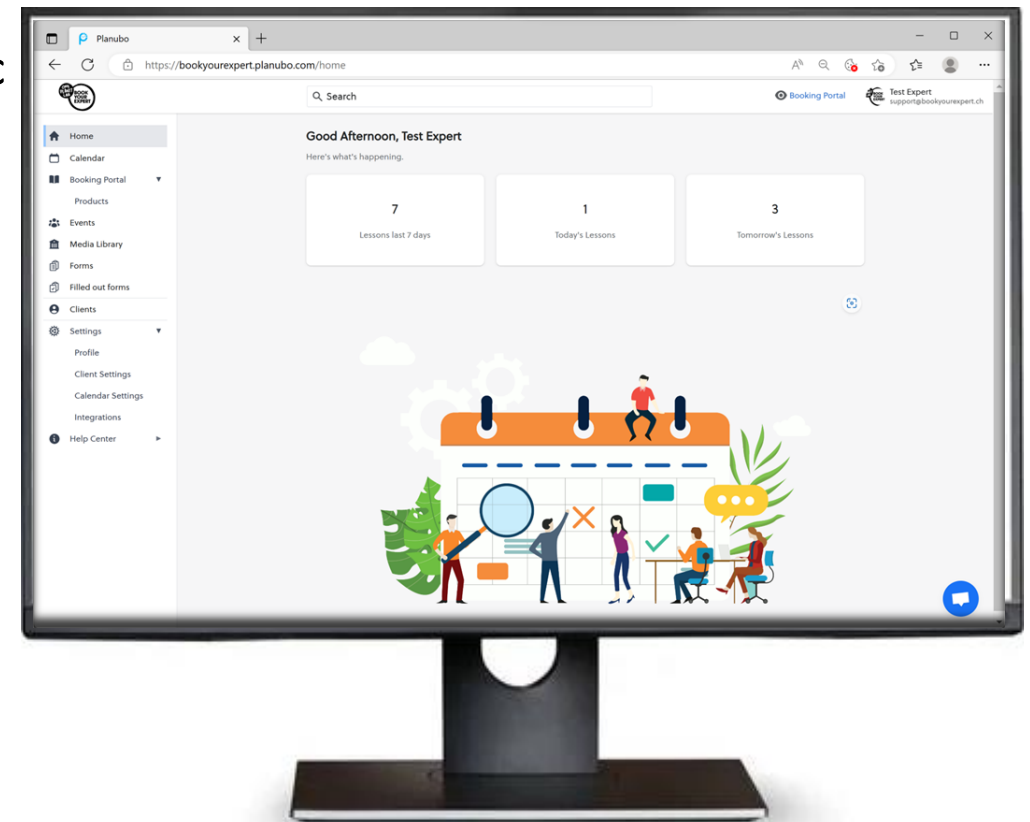
Your portal view, once live

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



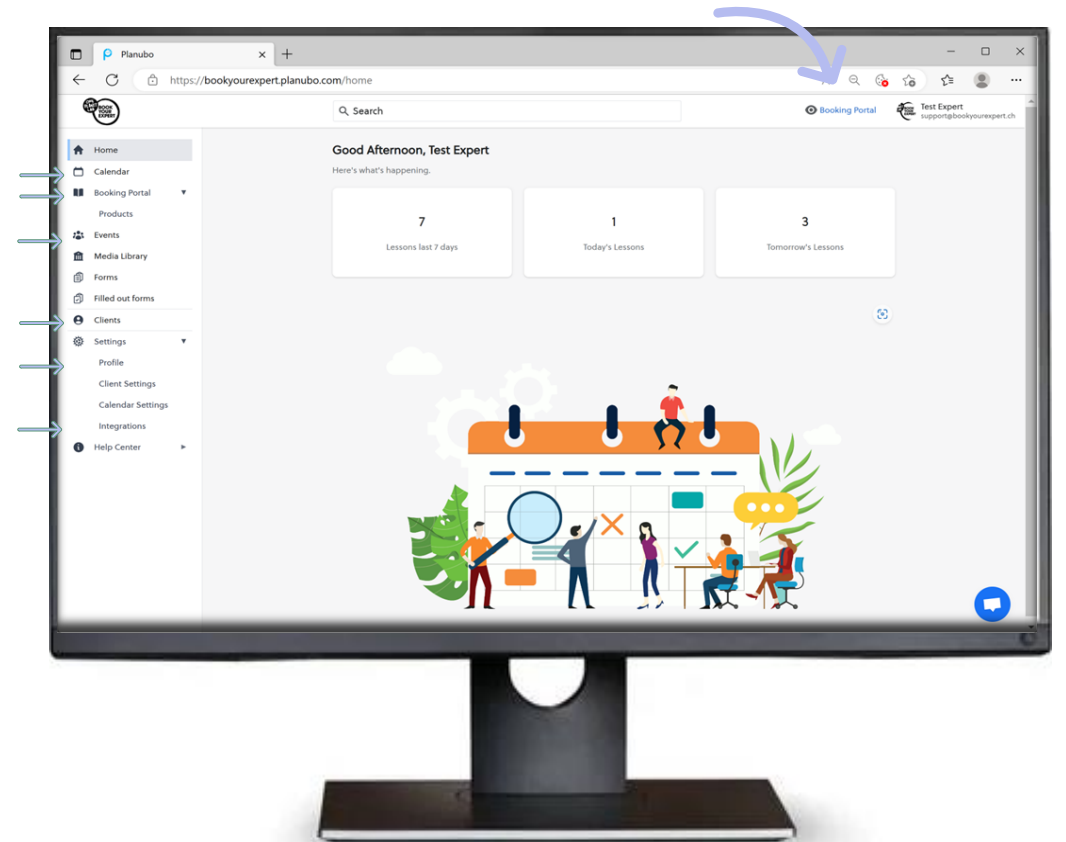
See your profile live

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.**



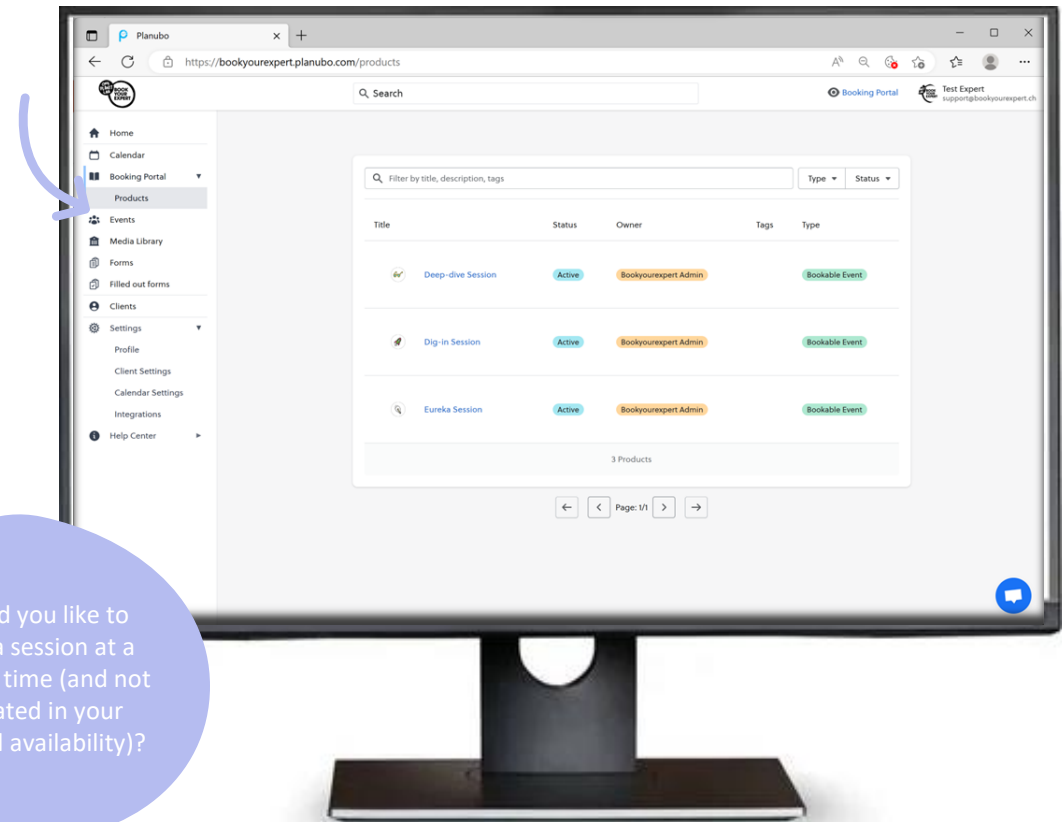
Setting product specific availabilities (1/2)

Adjust a product specific availability

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

Important...

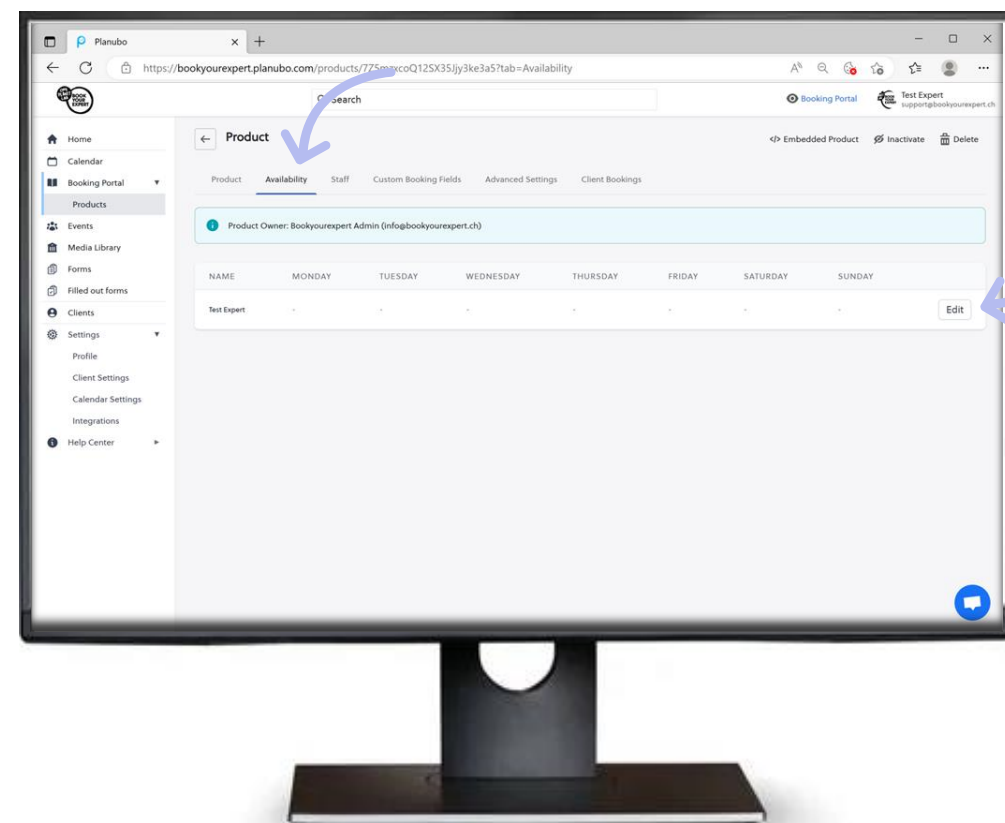
- This can be useful if you want to limit your availability for a particular session. For example: if you only want to offer a pro bono session for one hour per week.



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



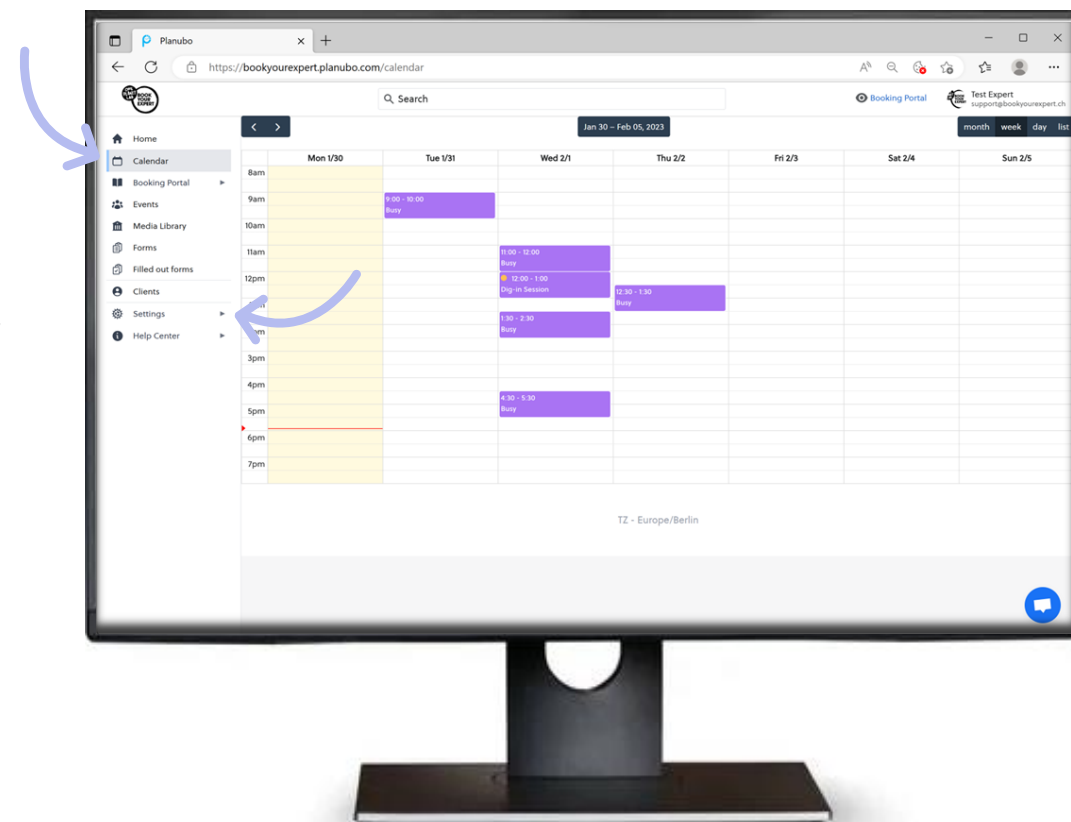
Managing your calendar

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



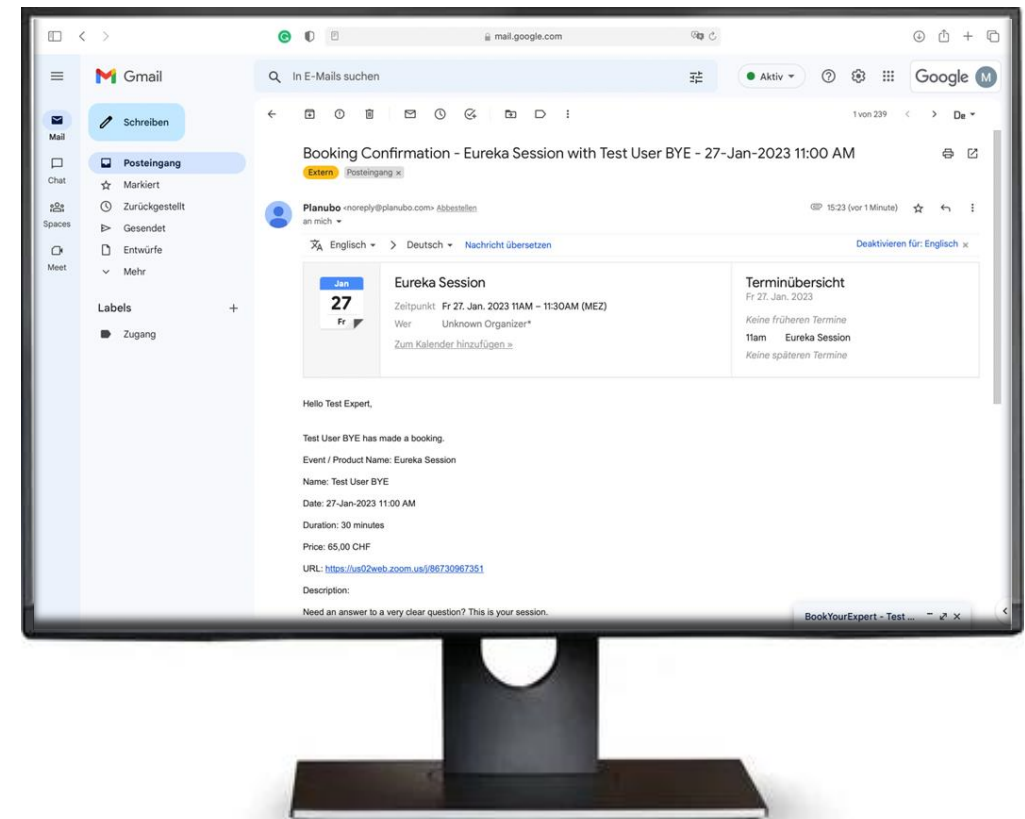
Receiving a booking

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...

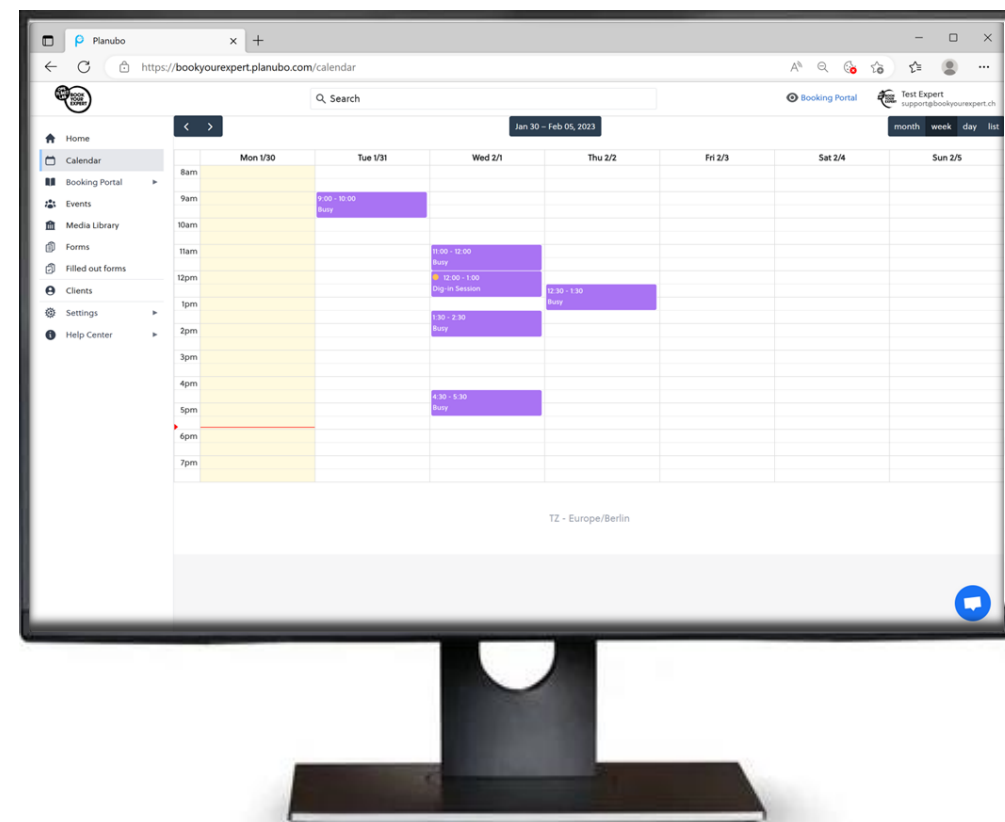
- Please check your emails regularly
- Please make sure you receive emails by noreply@planubo.com



Changing a booking (1/3)

Basic rules

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



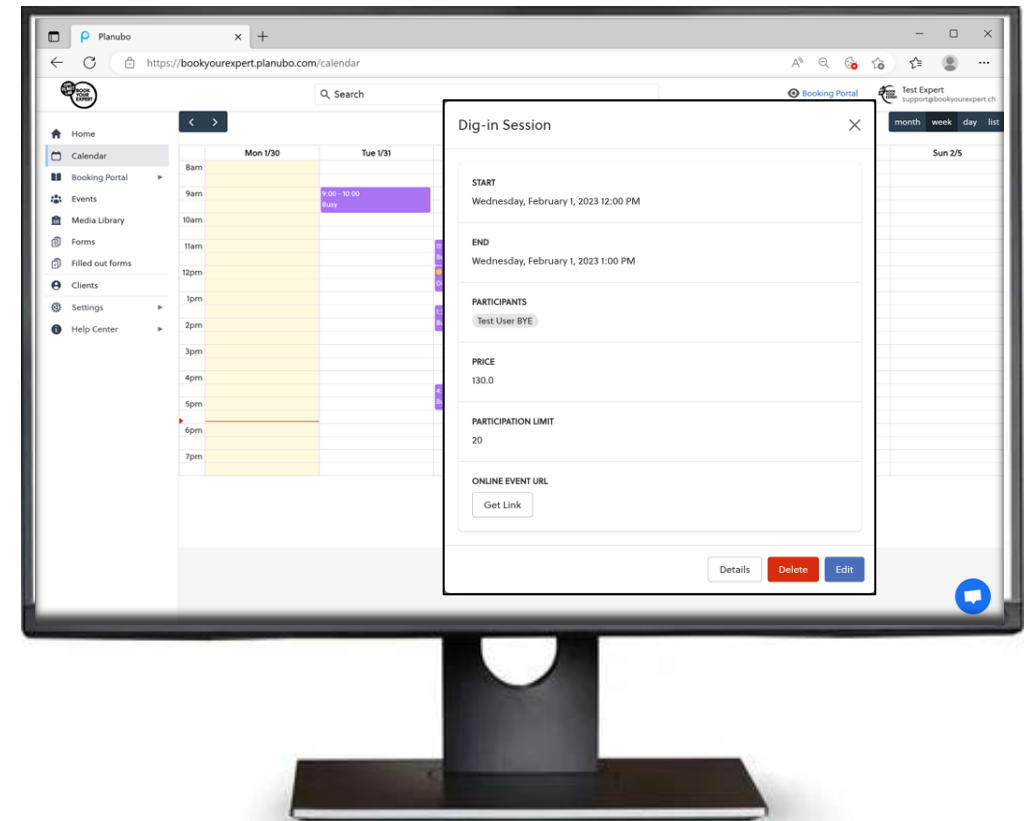
Changing a booking (2/3)

Change 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 changing the booking

Important...

- Bookings, cancellations and rescheduling **latest 48hrs before the meeting**



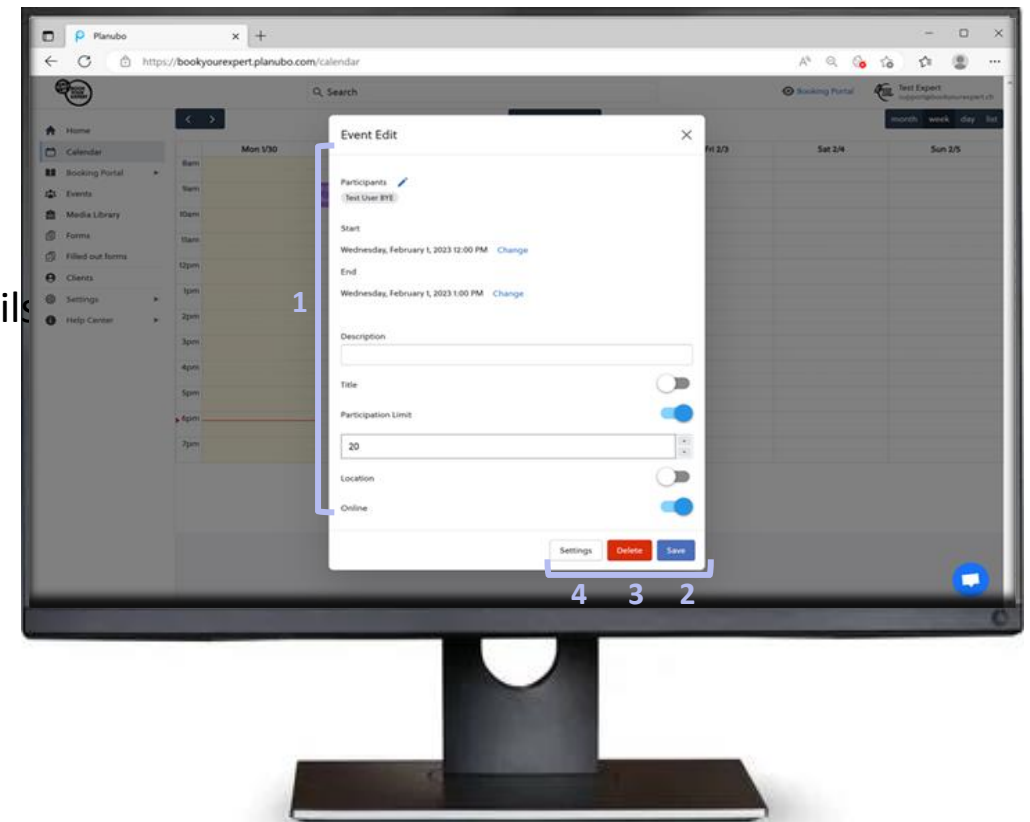
Changing a booking (3/3)

Change 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**



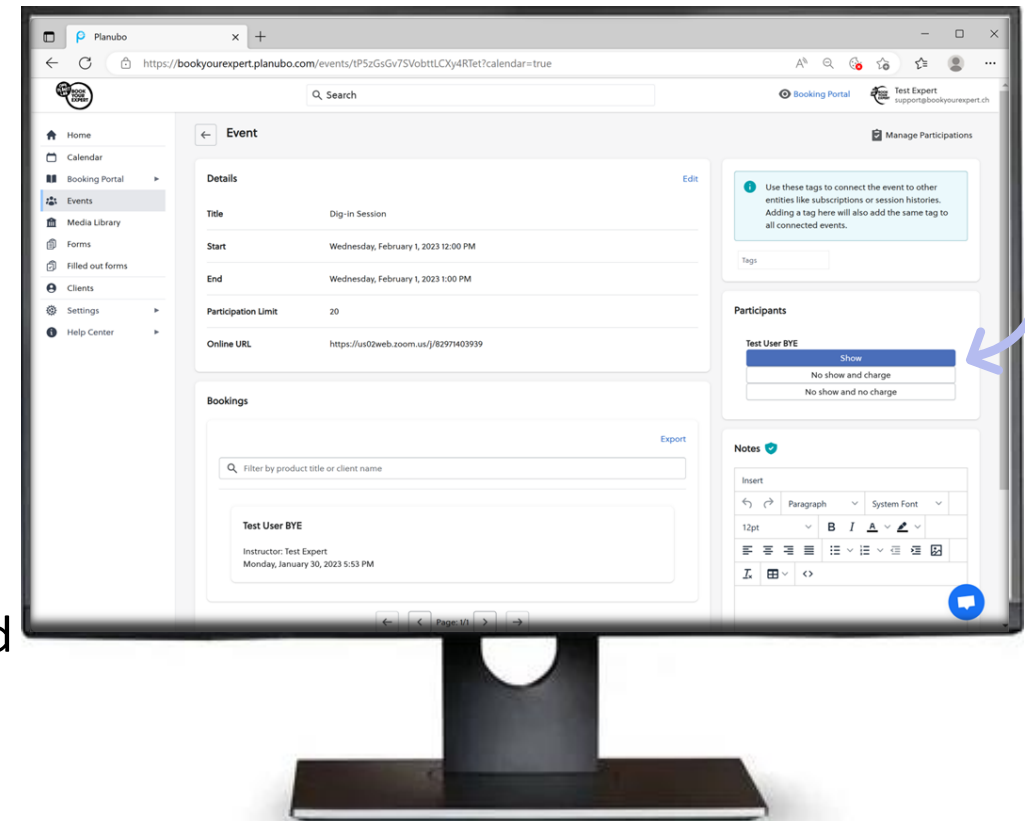
Booking details & no shows

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 rescheduling **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.**



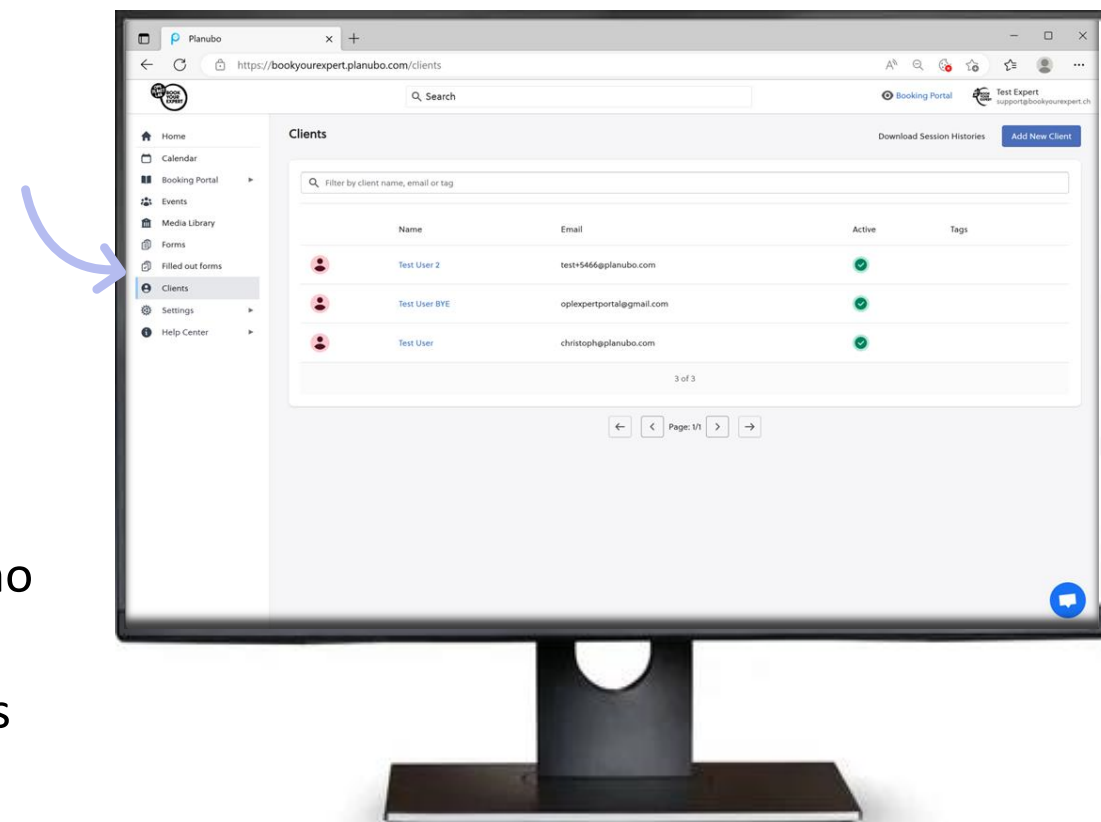
Portal users

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 them

Important...

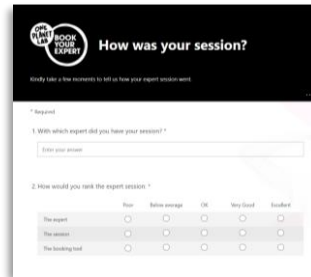
- **Only portal users who have booked sessions with you are visible.**
- Project teams often consist of few members who might join the call together.
- Portal users range from sustainable accelerators and other support programs to our open community.



Providing and receiving feedback

Feedback about your sessions

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

A screenshot of a feedback survey titled 'How was your session?'. The survey includes a header with the 'ONE PLANET LAB BOOK YOUR EXPERT' logo and the text 'How was your session?'. Below the header, there is a question: '1. With which expert did you have your session?' followed by a text input field labeled 'Enter your answer'. The second question is '2. How would you rank the expert session?'. This question is followed by a table with three rows and five columns. The columns are labeled 'None', 'Below average', 'OK', 'Very Good', and 'Excellent'. The rows are labeled 'The expert', 'The content', and 'The booking fee'. Each cell in the table contains a radio button for selection.

	None	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 booking fee	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Your feedback

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

A large, stylized graphic of the word 'WOW!' in a bold, blue, bubbly font with a black outline, located in the bottom right corner of the slide.



Invoicing and payment

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

Laurène Descamps
WWF Switzerland
Hohlstrasse 110

8010 Zürich
(via email to info@bookyourexpert.ch)

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.

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: CHF 130 or bilaterally agreed hourly rate as part of a partnership (private booking page “Branded Space”). For details and the basis of your invoice, please refer to your list of bookings and list of clients.



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**?
 - We offer the new promotional format “**Expert Lunch & Learn**” .Are you interested in being part of this event and showcase your expertise?
 - Questions regarding Communication? Interested in being featured?
- Please contact our team (info@bookyourexpert.ch).



Your contacts

For confirming your profile, general questions and feedback:

- Info@bookyourexpert.ch (BookYourExpert team)

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

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

Meet the team



Loukina Tille

Junior Manager

info@bookyourexpert.ch



Theres Kummer

Communications Manager

Theres.kummer@wwf.ch



Laurène Descamps

Partnerships & Strategic Advisor

Laurene.descamps@wwf.ch

Thank You!

We are very much looking forward to
enabling sustainable changemakers
together with YOU!



Initiiert und gehostet vom WWF Schweiz

Unterstützt von der Mercator Stiftung Schweiz
und der Hamasil Stiftung



Hamasil Stiftung