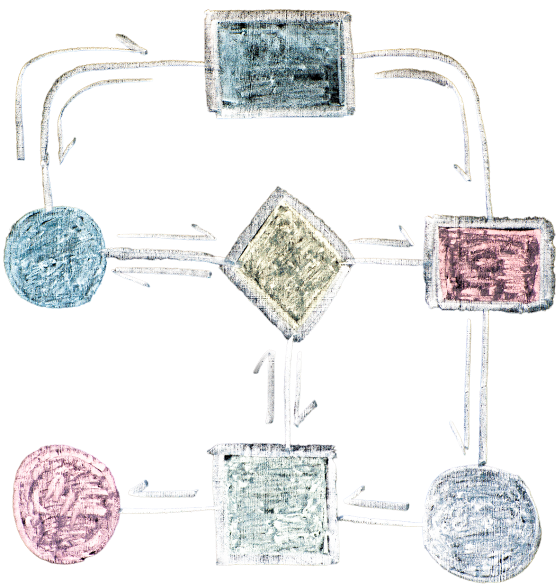
Guest Management Workflow



A step by step process to make guest booking as easy as possible.

One Stone Creative

PREPARE
CUSTOMIZE
AUTOMATE

79% of the top 100 business podcasts have guests some or all of the time. This is a pretty strong indication that unless your show is designed for specific purpose that doesn't include networking, relationship building and outside expertise, you should consider including them.

Guest Wrangling, however, can be time-consuming at best and an ongoing administrative nightmare at worst. There are a lot of moving parts to a podcast episode recording – you need the time and place for the actual recording, but you also need lots of biographical and promotional info for the guest, and in a perfect world, you also have the ability to test out the tech!

The process is never going to be perfect, nor can it be 100% fully automated. What you can do is follow a set workflow that combines some automation with the personal touchpoints that you need to build a strong relationship. In this eBook, you'll find the step-by-step process we recommend that people use to handle their guest booking and management, complete with examples of the emails you will want to prepare and have ready to customize and send.

At a high level, here is the process a guest goes through to get on your show:
Invitation to Booking Calendar

- Confirmation and Request for Information
- Reminder
- Interview
- Follow-Up
- Promotion

We're starting this at the point where you've reached out to a guest and they've accepted, and this workflow continues up through the follow-up. If you need some insight into finding and inviting your guests, check out "How to Find and Book Guests," and for the promotional element, check out the Guest Sharing Swipe File (Both are included with the "Everything Guest" Bundle!)

CALENDAR CONFIGURATION

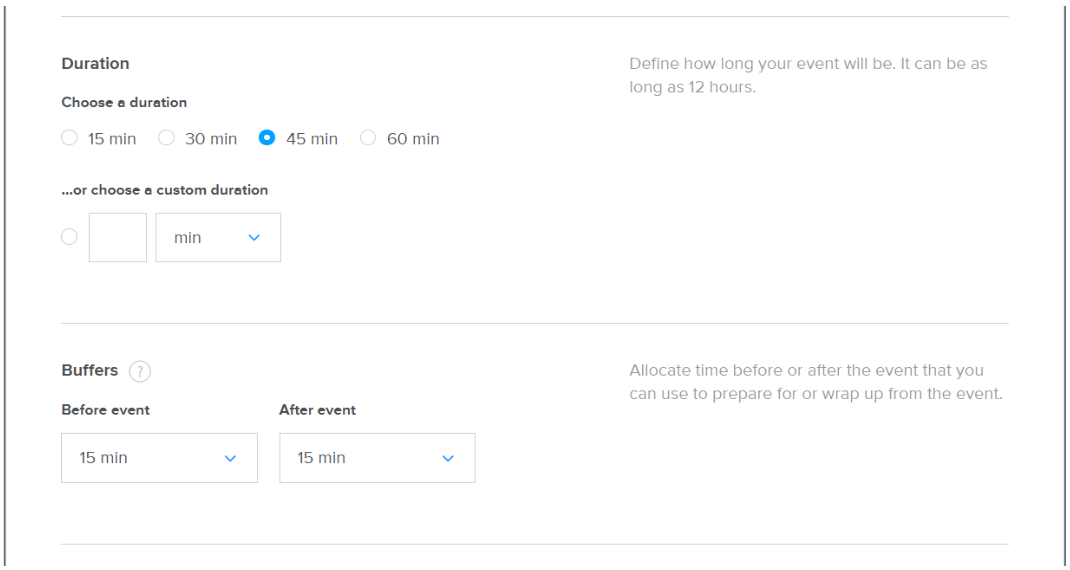
Let's begin.

Once someone has agreed to be on your show, the first thing to do is send them your Podcast Booking Calendar.

Booking Calendar
Tech Needed: Booking Calendar like Calendly or Acuity.

(This workflow uses Calendly functionality and terminology, but the equivalents should be available in any well-constructed calendar!)

First, create a specific Event Type for your podcast interviews. Make them about 15 minutes longer than you'll need for the call itself, and make sure that you set some "buffer" space in between available bookings. You don't want to run behind and be late for the next interview or have to cut things off!

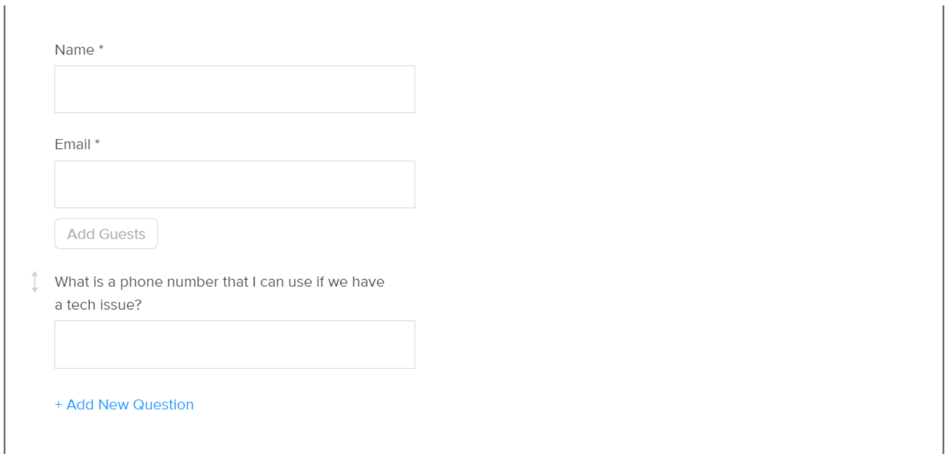


It would be wise not to allow for more than two or three interviews in a single day – that is a lot of prep and a lot of strain on your voice! Batching is awesome, but not at the expense of quality.

In most calendar systems you will have several configuration options. The ones we will want to configure for our podcast interview guest are the attendee questions, the "add to calendar" option the reminders, and what happens after someone completes the booking.

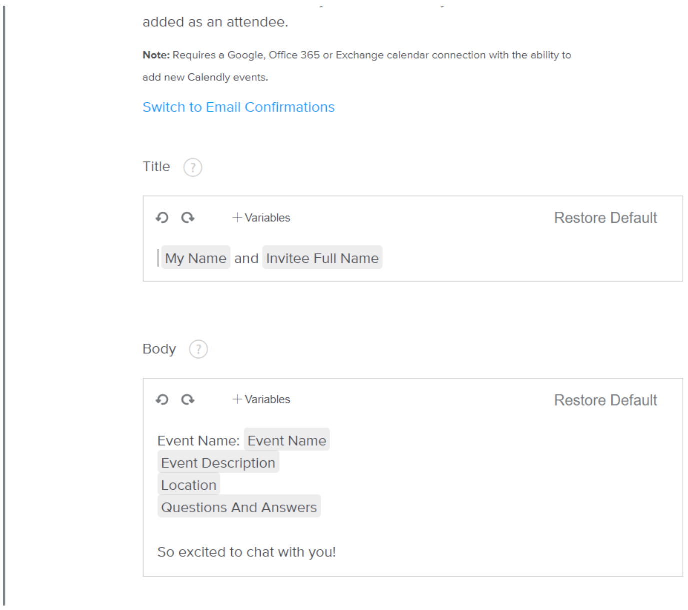
Attendee Questions

You want these to be short and simple (we'll get more information in the next step!) Just make sure to collect your guest's name, email address and a phone number in case of tech difficulties!



Add to Calendar

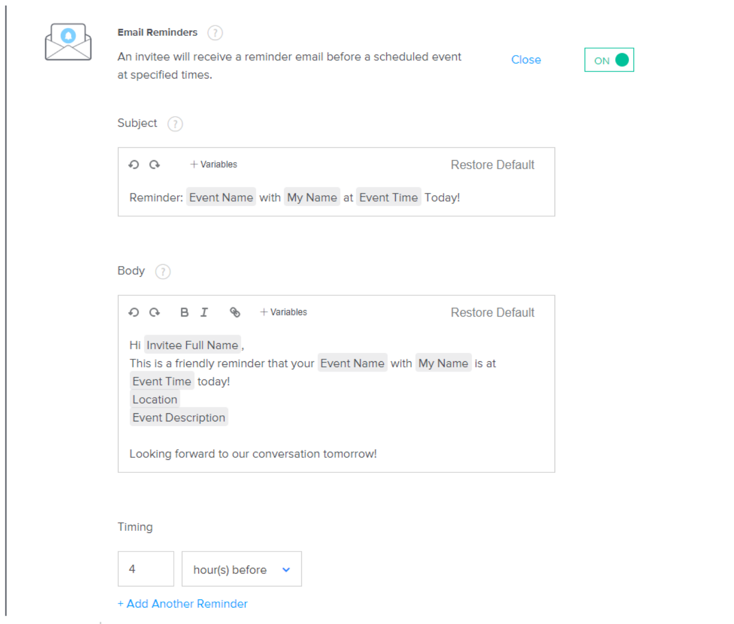
It's important to make sure this is toggled on, and I like to personalize it a little. In Calendly the default 'Add to Calendar' title is Guest name and Your Name. You should change it so that your name comes first, and theirs comes second. When this is pushed to the guests calendar, your name will be visible on the week or month view instead of their own, and this lets them see who they are speaking with right away, without having to click into the event. Of course, YOU will have to click into the event to see who is up next, but I'd file that under being a considerate host. ☺



CALENDAR CONFIGURATION

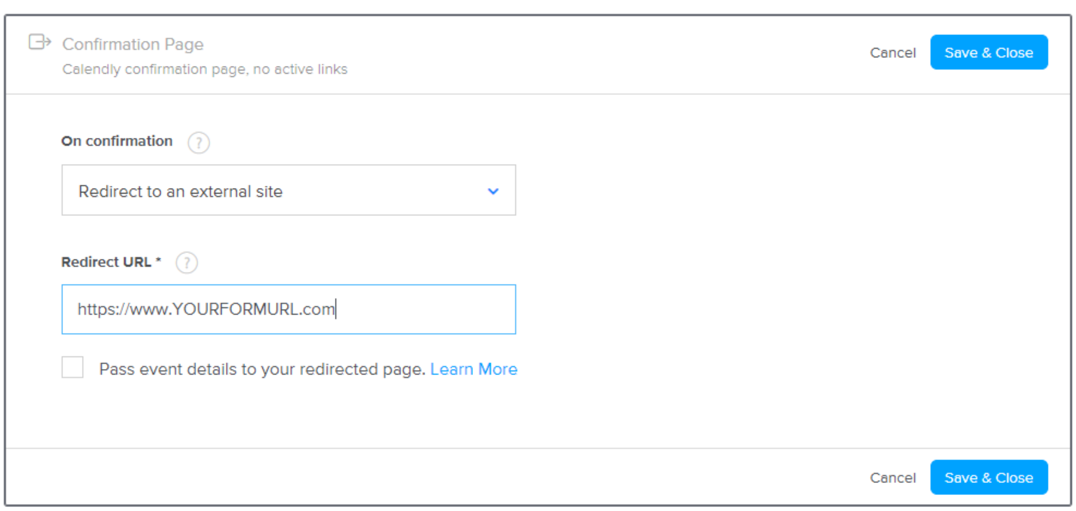
Email Reminder

I set one reminder for 4 hours in advance through the calendar system. You'll be sending a couple of emails personally, so there is not need to overwhelm them with automated messages. The only change you need to make to the boiler plate is changing 'Event Date' to "today!" since it is a same day reminder.



Confirmation Page

This is the page that your guest's (or their assistants!) see when they confirm their booking. You should change this from the default to an external link. That external link is going to be to a page on your site with an information request form, or a form provider like Typeform or Googleforms. We'll get into the details around that in the next section!



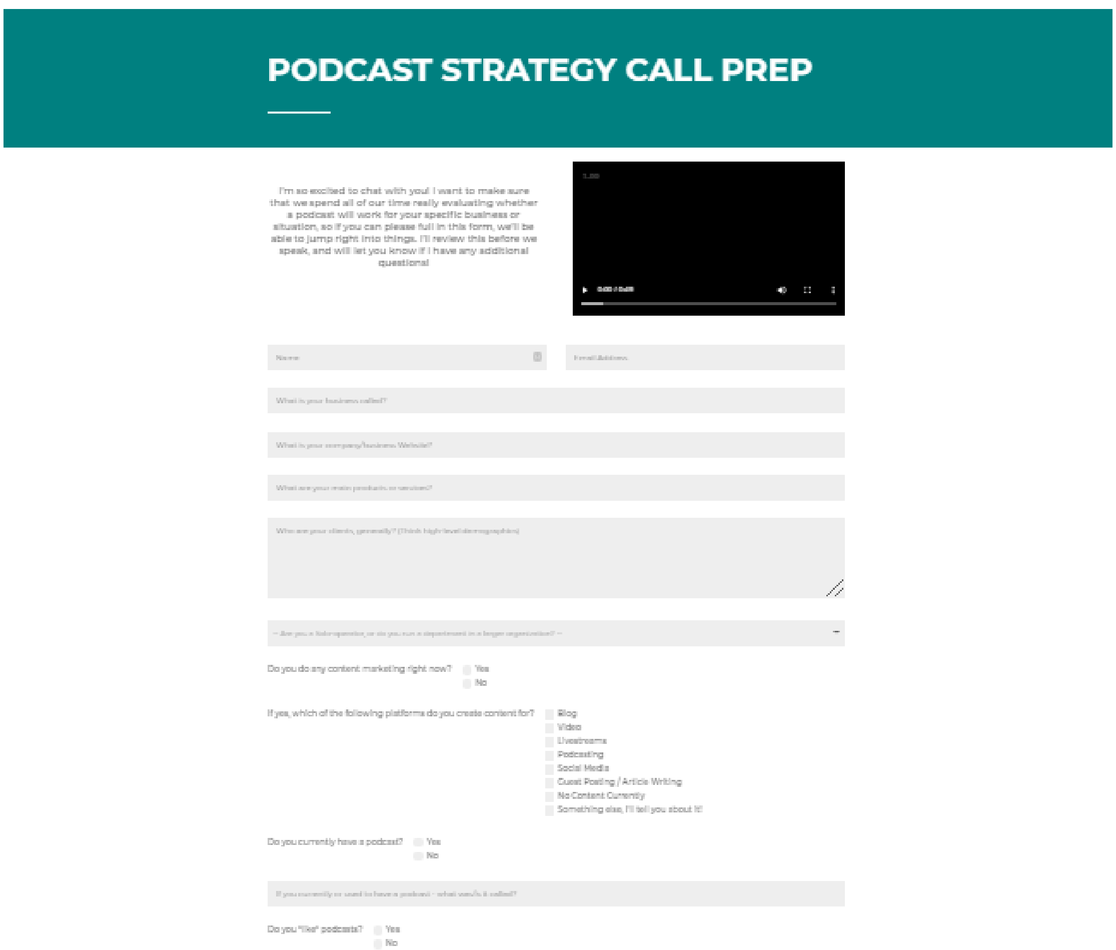
After your guest or their assistant confirms the interview time through your calendar, they should be directed to a URL where they can provide more information. Make sure to write a note at the top of the page or form thanking them for booking a call, and explaining why you need the information you do!

Examples of what you'll want to collect are:

- Full Name
- Title
- Contact Information (for publication)
- Links they want to promote
- Social Handles to Include (in the show notes and also so you
- can connect with them there!)
- A headshot
- Anything they would be particularly excited to talk about.

You can customise this to gather the exact information you need for your own show.

Here's an example of how this might look:



Please note – this is a pre-call form for a podcast strategy discussion, but the same basic format will work for your interviews! You'll notice at the top there is a little video – this is a short welcome and instruction video I recorded to explain the purpose of the form. This is optional, but a nice touch!

The URL of your information form, whether that is on your own site or an external service is the URL that you need to add to your calendar under the "Confirmation Page" setting.

All right – now you have the guest booked, the information you'll need to promote and connect with them. That takes care of most of the automated tech. For the rest of the workflow you (or your assistant!) will be sending customized emails.

We'll get into those on the next page!

EMAIL COMMUNICATIONS

There are three emails that you'll want to prepare for each guest that you're going to be interviewing what will be sent after they've agreed to the call and you've sent your calendar link.

They are:

- Confirmation of Confirmation
- Content and Tech Prep
- Thank you and Follow-Up

Let's go through each. Template copy is in red, with elements to customise in [SQUARE BRACKETS].

Confirmation of Confirmation

This is an email that you will send a day or so after you have received their completed form. You'll will have had a chance to test all of the links, verified the quality of their headshot, and can get anything corrected if you need to.

This is also a good opportunity to ask them what social media platforms they would like sharing materials for! It's not a demand to share, but a lovely way to be attentive to what will make sharing the easiest for your guest.

You should also let them know when they'll next be hearing from you and why. They key purpose for this email is to make sure you have all of the information you need ,and orient the guest with where they are in the process.

If they haven't filed out their form within a few days of booking the call through your calendar, you can also use this email to remind them it needs to be done! Add the form link, and explain how the information will help you promote their episode to your audience.

Here is a swipe template you can modify for your own workflow!

Subject: Confirming Your Information for [PODCAST] interview

Dear [NAME],

Thanks for sending along your information - all of the links and your headshot look great. [INDICATE IF THIS ISN'T THE CASE!]

Our call is going to be [DATE AND TIME]. A few days beforehand, I'll send you a note about what we'll be covering, and some tech details.

I'm looking forward to our call - pleae let me know if you need anything in the meantime!

Best,

[Your Signature]

The Next Email you'll be sending is: **Content and Tech Prep**

This email is basically pre-interview house keeping!

Experienced guests will probably have a solid A/V set up, but you'd be surprised! A reminder never hurts. This email provides some suggests for optimizing the audio environment to make sure you get the highest quality recording possible.

In this email, you can also give the guest your questions (if you like to give guests questions!) or a general idea about how the call is going to flow. There is some debate about whether or not you should share your questions list – some guests expect or even demand it, but many hosts prefer to keep the exact questions under wraps to get the raw and unpracticed responses that happen when things are totally off the cuff.

This is absolutely about your own preference, and you may want to experiment with sharing different amounts of information about the interview content beforehand. If in doubt, a middle ground is always helpful. Instead of providing a full list, just explain the structure o the call, and a few key points you want to make sure to cover. In the swipe example below, you'll see this demonstrated with the note that more information about the questions can be provided on request.

Subject: Ready for our call on [DATE], [NAME]?

Dear [NAME],

I'm really looking forward to our interview! I want to make sure that our conversation comes through with the highest possible quality, so there are a few things to check and to think about before we sit down to record.

Sound Environment:

- Do you have a quiet room where you can be while we chat?
- Make sure that any windows are closed, and no loud appliances are running.
- Does your chair squeak? If your desk chair is a little noisy, switching it for a kitchen chair can cut down on background sounds.
- If you wear earrings or other jewelry, try to avoid dangly items that can click and rattle. Similarly, try to avoid clothing that rustles.
- If you have long hair, make sure that it doesn’t interfere with, or brush against your mic.
- Pets and family members are wonderful but should not be in the room while recording.
- If you ever have internet hiccups, rebooting your router or computer about 20 minutes before the call can make sure there won’t be an interruption while we’re talking.

Conversation:
We'll start the conversation with recording off and make sure everything sounds as good as possible.

As we’re talking, if you stumble over words or make a mistake – don’t worry too much! We’ll edit out major errors. Take a breath and start the sentence over. The same goes for if you want to think over an answer for a moment or two – we can fix any pauses in post.

We’re going to be talking about [TOPIC/IF YOU ARE PROVIDING QUESTIONS NOTE YOU WILL ATTACHE THEM TO THIS EMAIL] - if you have a few minutes to think of any stories, anecdotes or realizations you had about the topic those kinds of elements translate beautifully into audio.

Thank you again, and let me know if you have any questions!

[Your Signature]

Finally – the **Post Interview Follow-Up.**

This is an email that you will send later in the day, or the day after the interview. Keep it short and sweet. Thank them for their time, mention a specific moment you really enjoyed, and let them know when they can expect the release details and sharing materials from you.

Subject: Thank You!

Hi [NAME],

Thanks for a wonderful conversation [EARLIER TODAY/YESTERDAY]! I kept thinking about [THING THEY TALKED ABOUT YOU THOUGHT WAS COOL] - I'm going to [REMEMBER THAT / TRY IT / SHARE IT WITH SOMEONE.]

We're getting the episode into production now, and we should be releasing it around [GENERAL TIMEFRAME] - I'll be in touch the week before with exact details and some sharing materials for you.

Be in touch soon!

Best,

[Your Signature]

And there you have it! This process has a few moving parts, but a lot of the heavy lifting is done with your calendar, your form and email templates that only need to be customized for each guest.

Here is a quick rundown of how this looks from the guest's standpoint:

- They agree to be on your show.
- They book a convenient time on the calendar.
- They submit their bio and promotional information on a form.
- They get confirmation of the date and time that everything is in order.
- They get a note about the content and tech prep.
- They receive a Day-of reminder with call access details.
- They get a follow up thanking them for their time and letting them know what happens next.

Happy Interviewing!