



BookYourExpert

User Manual

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

Your expert portal for sustainability endeavors at every stage

For NPOs & Start-ups

Access our portal for sustainable NPOs and start-ups, boosting your impact with specialized rates and a diverse network of experts.

For Businesses

Connect your business with vetted sustainability experts for discounted guidance across 50+ topics through a single portal.

For Experts

Empower validated experts to provide immediate and impactful support to sustainability projects on our platform.

For Programmes & Networks

Leverage know-how for your eco-friendly programs, offering tailored expertise to projects without admin, maximizing impact.

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

After early market research and prototyping, a scalable platform solution was launched in 2023 and successfully tested with our growing network of experts, users and partners. Our pilot phase officially ended in early 2024 as we continue to constantly develop the portal, forge new partnerships and expand our reach.

Portal Statistics (Q2-2024)



+80

Vetted Experts

+80 (170)

Projects supported (pioneers reached)

+180

Booked expert sessions

75%

Success rate: Users reported that the sessions solved their problem

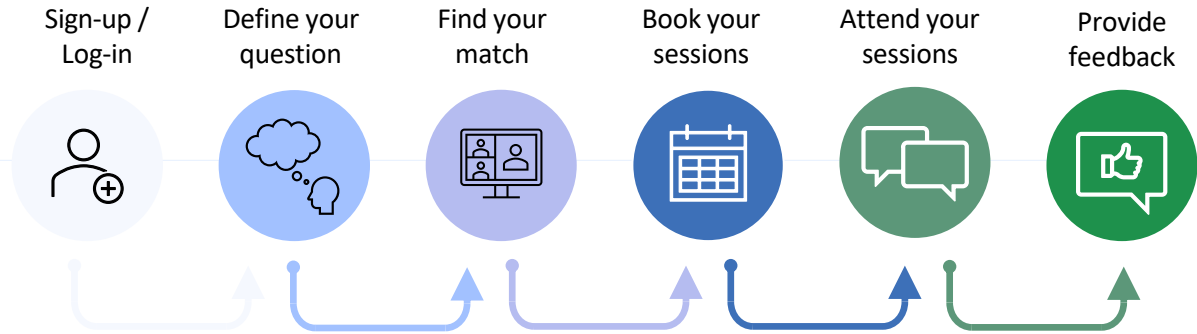
95%

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

10+

Sustainable accelerator programmes supported

The steps



What to expect

Once signed up/logged in, you can **choose from more than 80 vetted experts covering more than 65 topics** - our expert pool is constantly growing.

- If you have been granted access as part of an **exclusive program booking page ("Branded Space")**, you will have access to a **customized booking page with selected experts**.

Book your session with the expert of your choice in just a few clicks. **Choose a session type** to suit your needs (30 min "Eureka Session", 60 min "Dig-in Session" or 120 min "Deep-dive Session").

- Have you received a voucher? **Use your voucher code** to pay for the session, **otherwise pay directly** by credit card.*

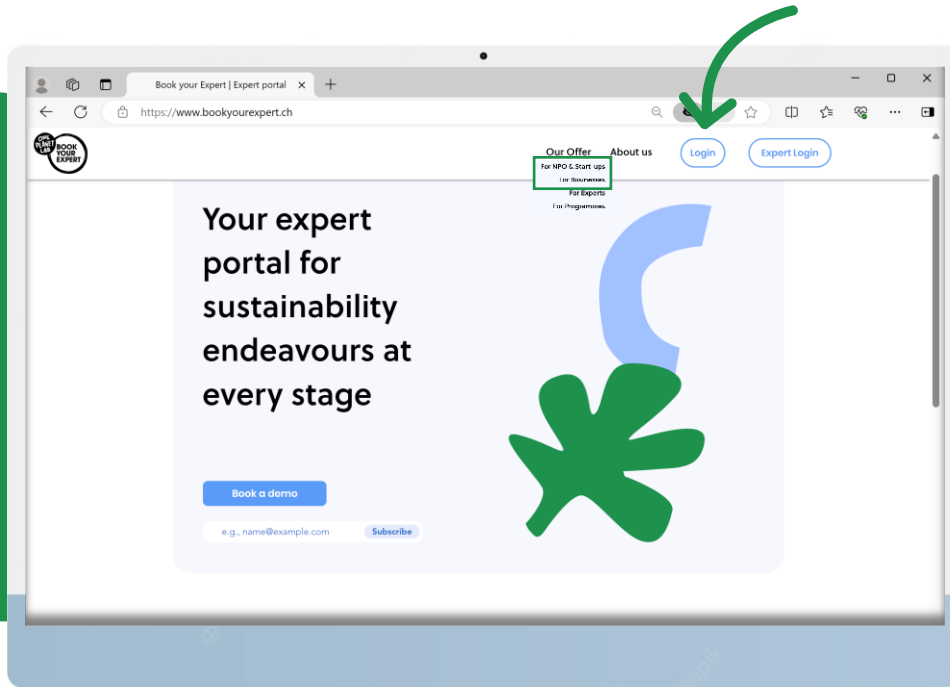
Conduct your session (online unless otherwise agreed) and **provide feedback** - a form will be sent to you after each session. Cancel / rebook sessions up to **48 hours** before the meeting.*

- **Accelerate your sustainable project** with the expert support. Need another session? Your access to the portal remains and you are **free to book further sessions**.

- Do you know of other sustainable projects that could benefit? **Spread the word**, share our [website](#) and [LinkedIn Channel](#).

** Detailed terms in [user agreement & General Terms & Conditions](#). Prices depend on the type of organisation (CHF 140/h for NPOs & start-ups, CHF176/h for companies)*

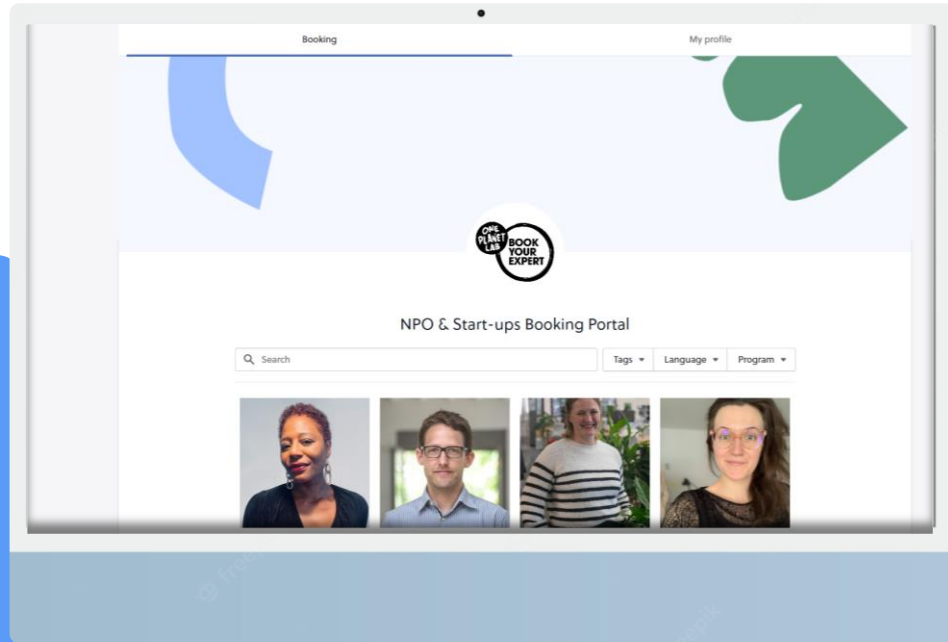
The website



Navigating the website

- **“For NPO & Start-ups / For Businesses”** provides an overview from your perspective
- Visit **“About”** page for project details
- **“Sign up”** under **“Our Offer”** depending on organization type – **“For NPO & Start-ups”** or **“For Businesses”**
- **“Login”** If you already signed up as user
- Website available in **three languages** (English, French, German)

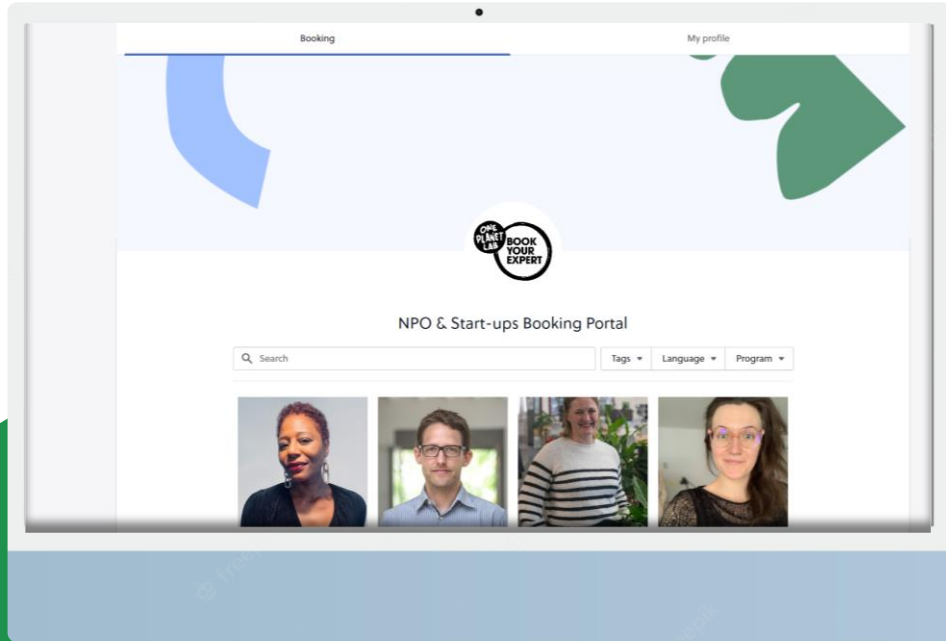
You are logged in!



Booking Overview

- Once you are logged in, you view the **“Booking” page**
- On default, all experts are listed in alphabetical order
- Navigate to **“My Profile” for your profile settings**

Finding your expert



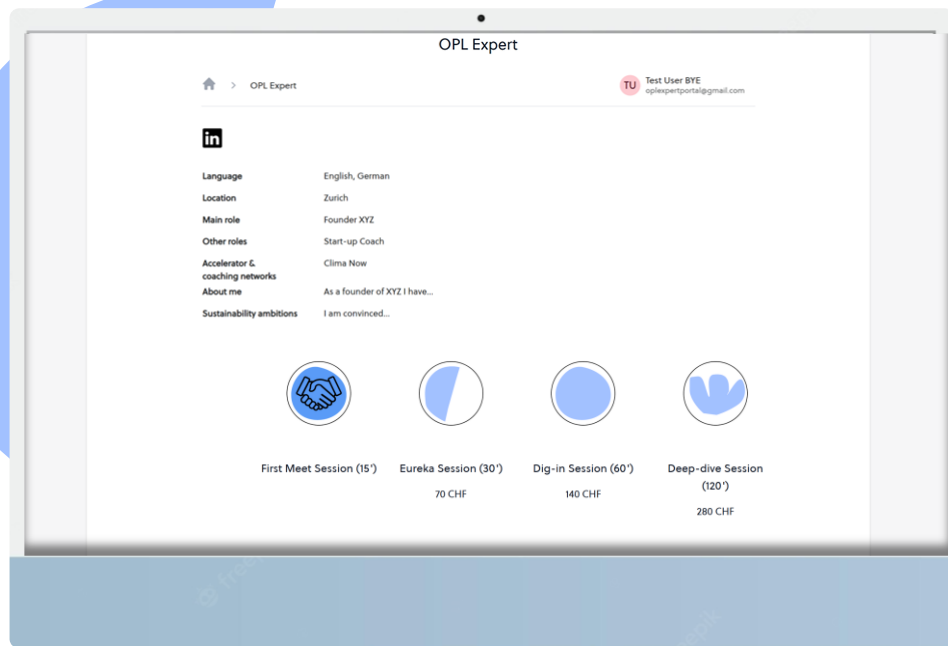
Booking Overview

- Search by **expertise tags** by clicking on tags and selecting from drop-down list
- In addition, filter by language if needed
- Search by expert name or tags in the free text field

Important...

- Only first tags shown here, complete list of tags visible on expert profile

Selecting the right session



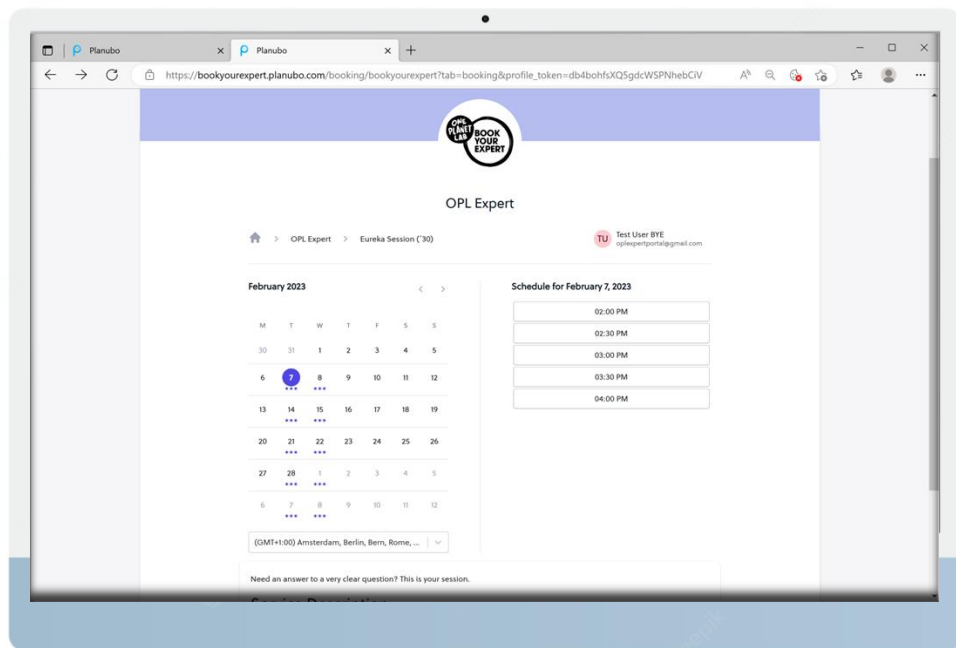
Select your session

- Once you know which expert you would like to book a session with, select **30 min “Eureka Session”**, **60 min “Dig-in Session”** or **120 min “Deep-dive Session”**
- If you would like to get to know an expert before booking a session, you can choose a **free “First Meet Session”**

Important...

- A description of the session can be seen when clicked on it.

Booking your selected session (1/2)



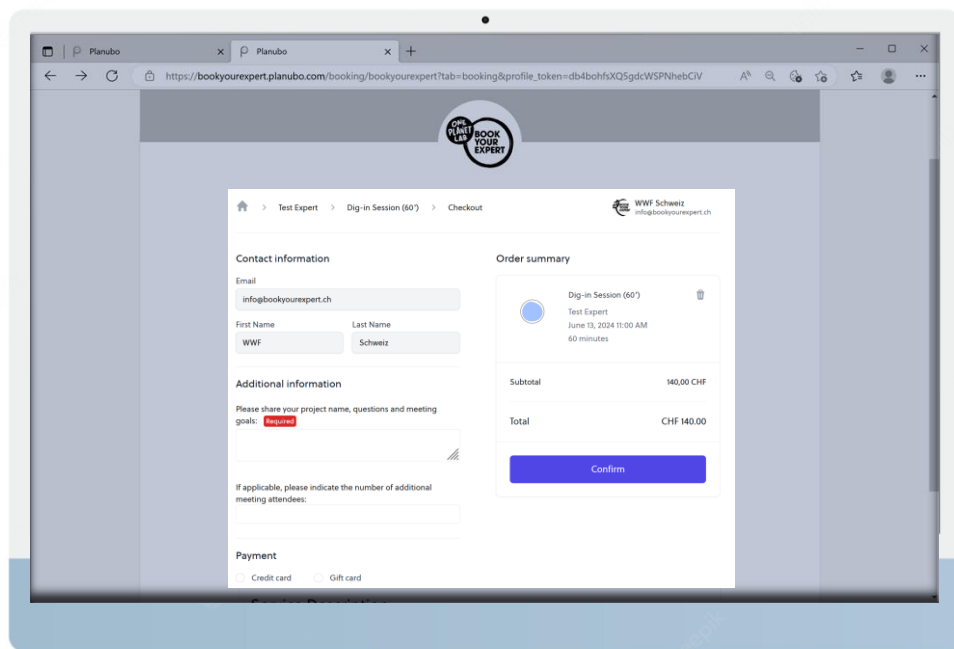
Book your session

- **Check availabilities** (available dates are marked)
- **Select an available date and time slot**

Important...

- **The booking process must be initiated by the portal user** in order to ensure that the payment & invoicing process can be supported. Bilaterally agreed bookings that are not recorded in the portal will not be accepted.

Booking your selected session (2/2)



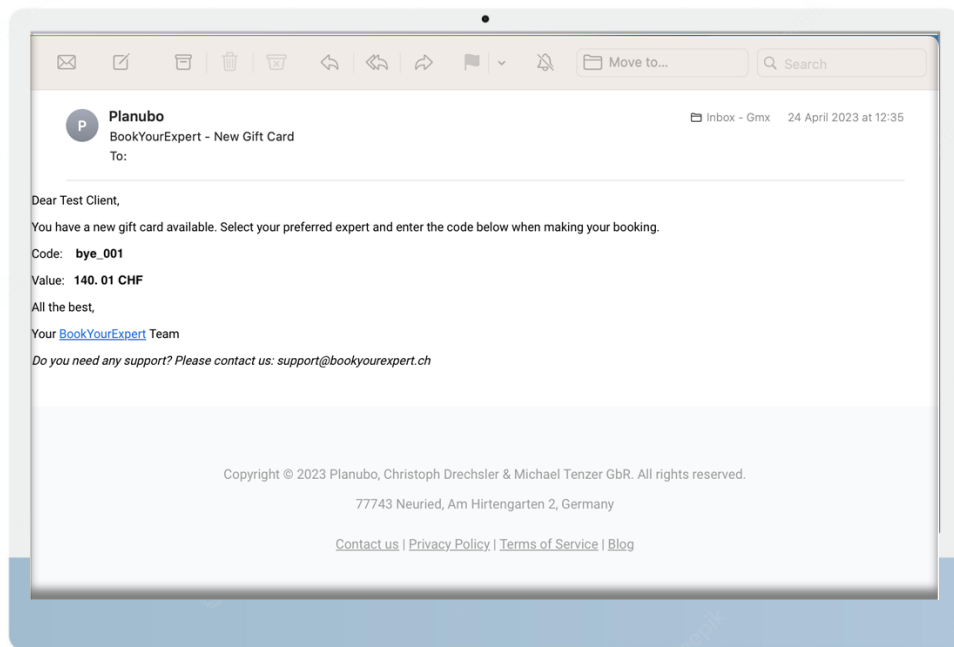
Book your session

- **Share further info:** project name, questions & meeting goals, No of attending members if applicable
- If applicable, **insert your personalised gift card code** should make the booking s. next page)
- “Confirm” booking

Important...

- Remember, the more information that you can include in the booking form, the better the expert can prepare for your session.
- The same gift card code **can be used for several bookings** (till limit reached).

Did you receive a gift card?



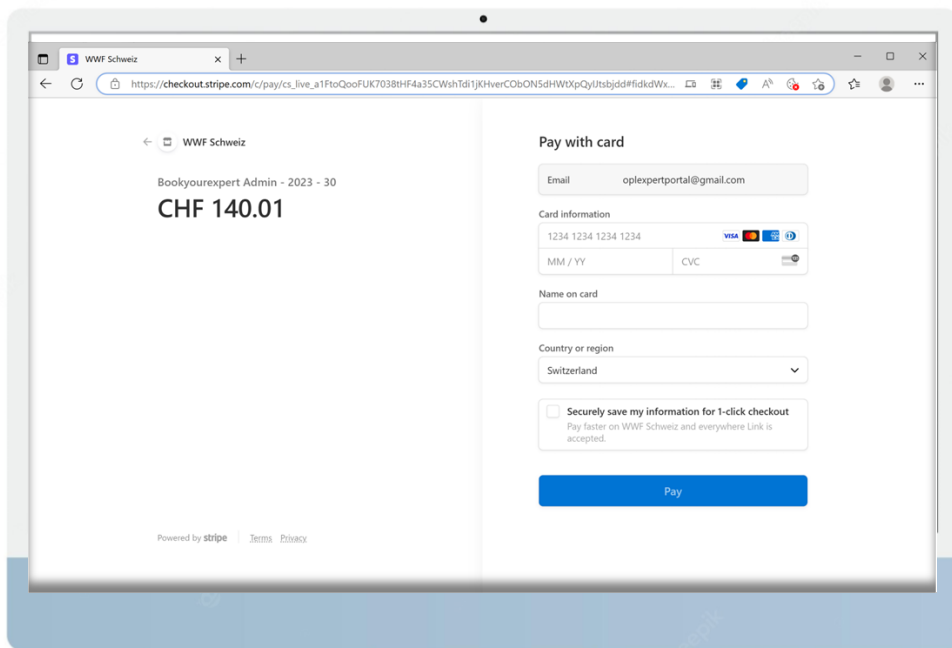
Your gift card

- **Are you eligible for a gift card**, e.g. have you won a free session or a discount, or have you been given access by a sponsoring partner as part of a programme?
- You received **an email “New gift card”** with your gift card details

Important...

- Make sure to receive e-mails from **noreply@planubo.com**
- Your gift card can be **used for all payable session types and for several bookings** (till limit reached).
- Your gift card **expiration date is shared in the “New gift card” email**

Or continue with payment



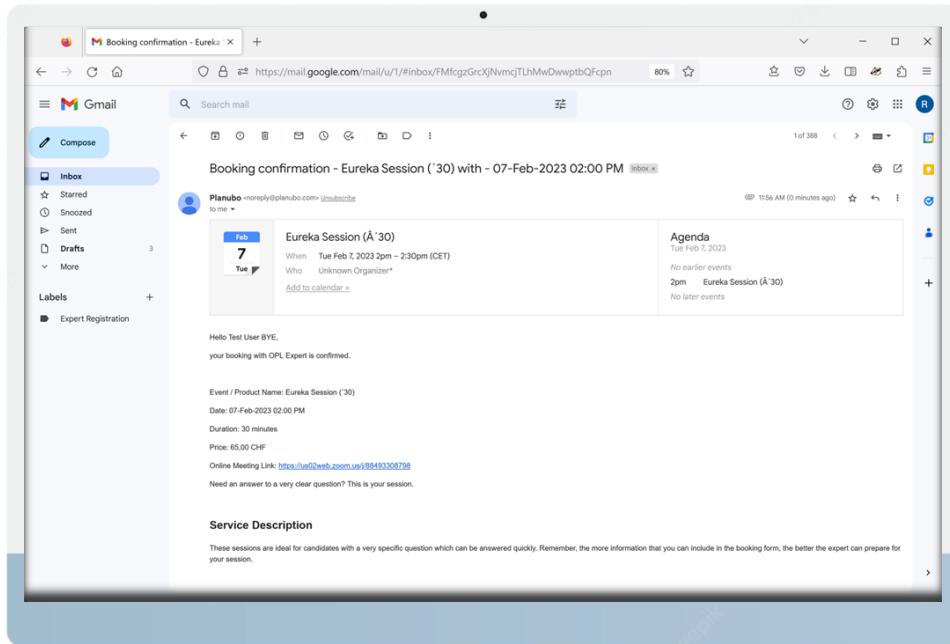
Pay your session (if not using a gift card)

- Pay with credit card and confirm.

Important...

- Session price **includes VAT**.
- Your payment is processed securely via **Stripe**.
- WWF Schweiz will manage and forward your payment to the expert.
- If your payment has not been completed immediately or you navigate back, **you have 30 min to pay your session** (Go to “Invoices” – “open invoices” and “pay now”), otherwise the booking will not be completed and your expert will not get notified.

Booking confirmation



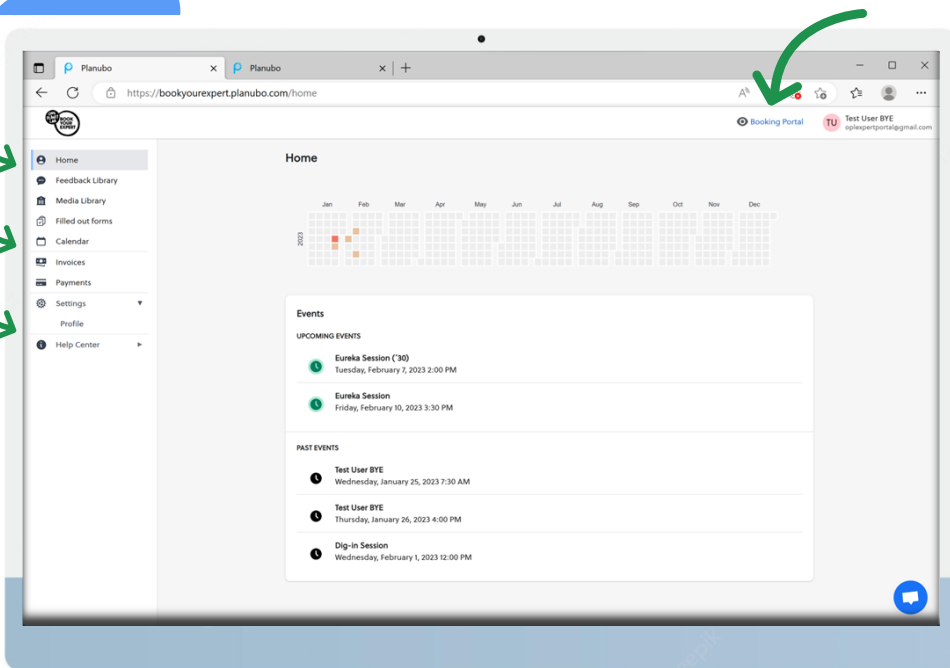
Notifications

- You will receive the **booking confirmation, incl. the online meeting link** (from noreply@planubo.com) via your registered email.
- **Add the appointment to your calendar.** If applicable, share with your attending team members

Important...

- Make sure to receive e-mails from noreply@planubo.com
- The expert receives a booking confirmation including the information you shared in the booking form.
- If you would like to share any documents or further information with your expert, **please contact your expert via email** (shown in booking confirmation).

Accessing your profile page



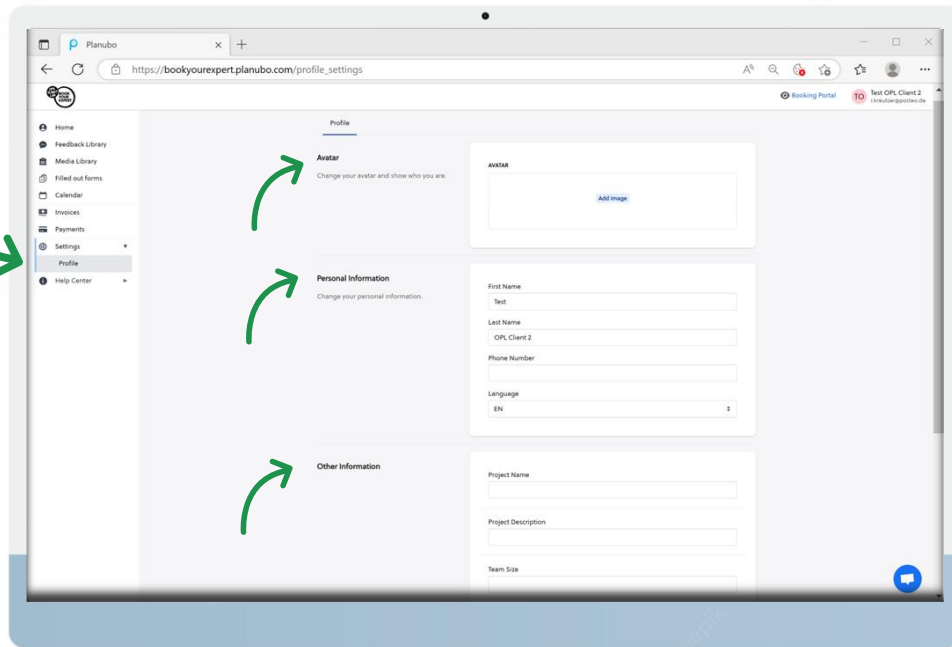
Your profile settings

- Click on **“My Profile”** for your settings
- Relevant member settings for you:
 1. Home to view all past and upcoming bookings
 2. Calendar to see and cancel bookings
 3. Settings – Profile to edit your profile

Important...

- Switch to **“Booking Portal”** for going back to booking page/overview of experts.
- Other areas (Media Library, Invoices, Payments etc.) currently not relevant.

Amending your profile



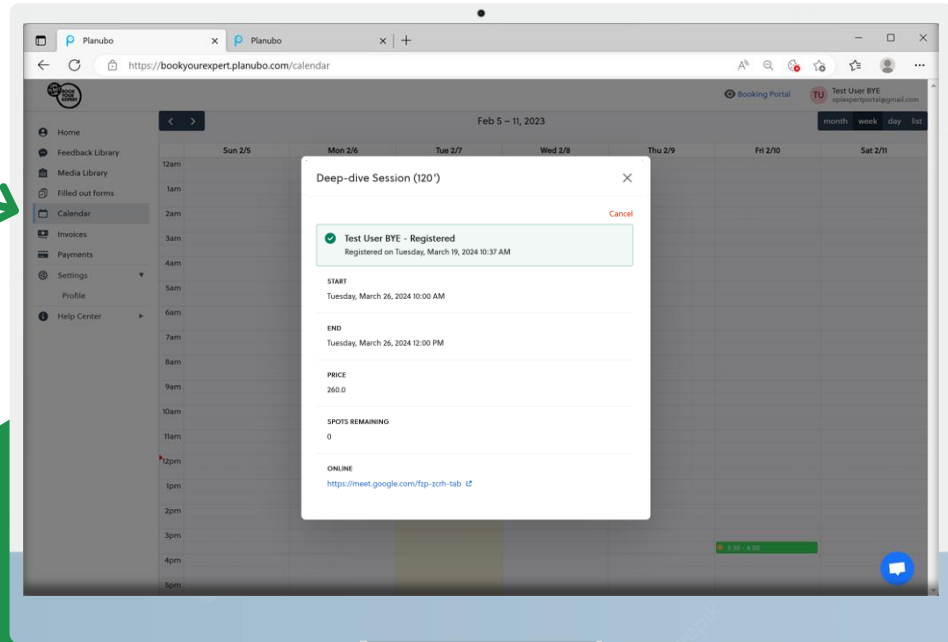
Complete your profile & select your language

- **Avatar:** Upload your profile
- **Personal info:** Check name and select your preferred language
- **Other:** Add project info (name, short description, team size)
- **Password:** Change if needed
- Other information like address, phone number or birth date not required

Important...

- Your **profile will be visible for experts with whom you booked a session.** Your completed profile info will help the expert understand the context better.

Viewing your calendar and bookings



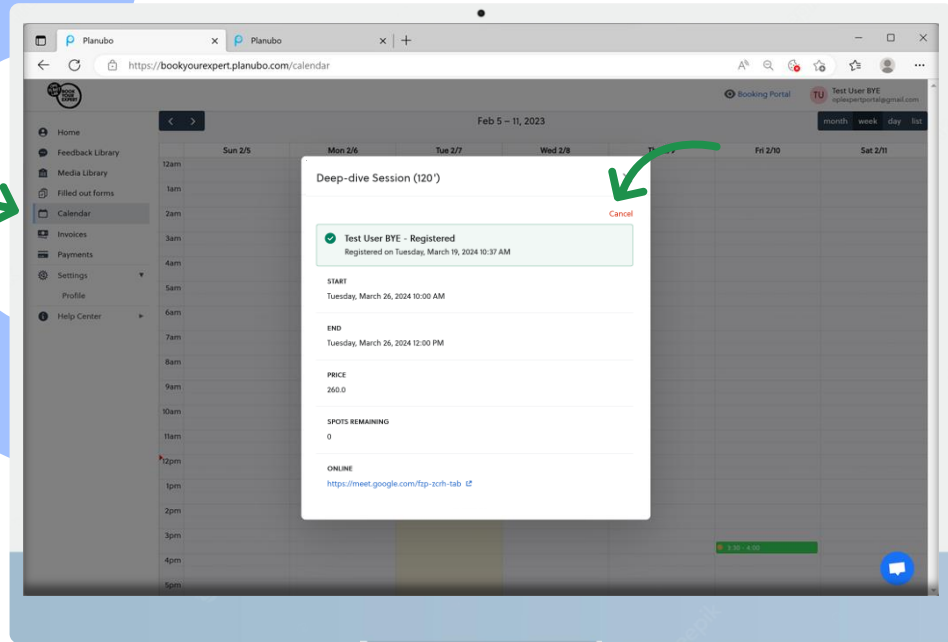
Calendar View

- Click on **"Calendar"** to see all of your **bookings**. Click on the event to see more details (Start & End Date / Time, Price, online meeting link).

Important...

- You can find the online meeting link here as well as in the booking confirmation email.

Amending a booking



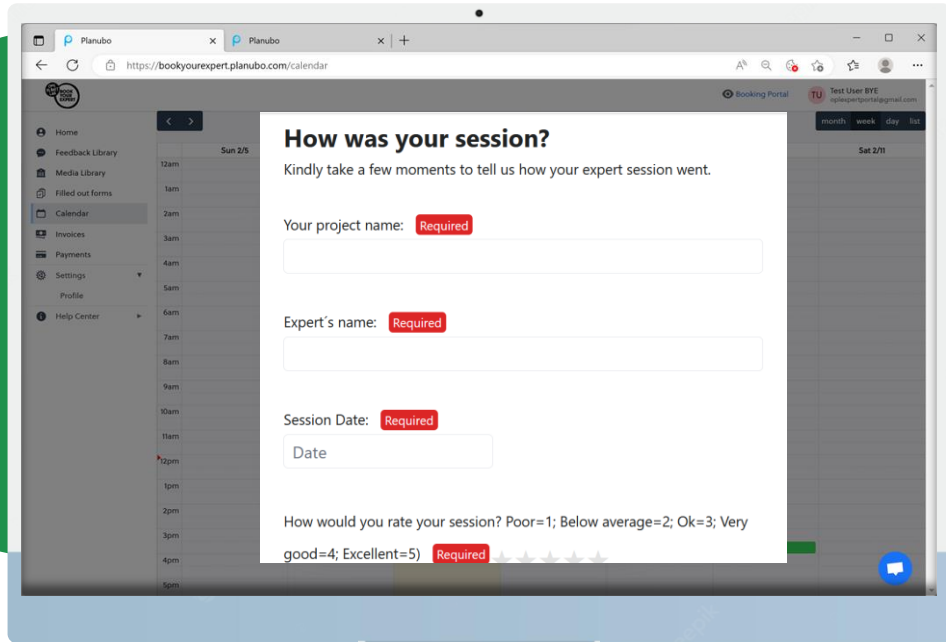
Amend a booking

- For amending a booking, **first cancel your meeting** by clicking on “Cancel”
- **Make a new booking** by proceeding the same previous steps

Important...

- Your expert will be informed about the cancelled meeting.
- Bookings and cancellations **latest 48hrs before the meeting**.
- Meetings cancelled **after 48 hours are charged** and count as **no-shows**

Providing Feedback



Feedback about your session

- After your session, you will receive an **automatic email reminder to provide feedback**. (Please check your e-mails)
- A **feedback form** will be assigned to you in the portal for each session
- Please log into the portal and fill out the feedback form

Important...

- The feedback form will pop up **until the feedback has been received**.
- Your feedback will help us to continue to improve the portal and understand how the sessions & experts have helped you!

We are not perfect...

- We are constantly trying to improve BookYourExpert, e.g. user-friendliness...
- We love to hear your feedback and suggestions anytime.



Next steps

Your Checklist for using the expert portal:

- ✓ If entitled, check your gift card details (sent via email)
- ✓ Complete your profile
- ✓ Find and book your experts (& use your gift card before its expiration date)
- ✓ Attend session
- ✓ Provide feedback
- ✓ Book further sessions as needed

Your contacts



For general portal related questions:

- Support@bookyourexpert.ch
- 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



Theres Kummer

Communications Manager

Theres.kummer@wwf.ch



Patricia Matzdorf-Gobeli

Partnerships & Strategic Advisor

Patricia.matzdorf@wwf.ch



Thank you for using BookYourExpert!

We very much look forward to **facilitating
knowledge exchange!**