Workflow Guide

Virtual Studio Manager

This guide outlines how we use Virtual Studio Manager to keep track of our Clients and gather important details from them.

There are many more ways to use VSM to communicate and manage your Clients - this guide is simply a suggestion.

Customize your forms, tailor your emails, add new customized emails (Pro Plan only) and develop a system that works best for you.

We're glad you joined the VSM Community!

Your Client

1. Visits your site
2. Submits info via a linked or embedded Contact form/Pricing form
3. Returns to your site
4. Receives your customized auto-reply email

Basic Plan Members: Since you can not link or embed forms to your website you can add Client's to your VSM Database via the Client Inbox > Manual Entry Form. The following steps (after step 2) all apply in the same manner.

If you decide you'd like to link forms directly to your site & send auto-email replies to your Clients, you can upgrade at any time! Visit your Studio Info tab for account options.

You...

1. Receive an email update
2. Login to VSM to view the details
3. Send your Client a Shooting Day Details (SDD) form to learn more about their project

We recommend...

Giving your Client's a call as well – let them know that their SDD form is on the way and if they have any questions you're there to help.

Your Client

1. Receives your customized email including a link to their SDD form
2. Enters their email address to access the form and shares information
3. Submits their form and is sent to a custom Thank You page, or back to your site

You...

1. Receive an email update letting you know a Client has updated their SDD form
2. You login to VSM to access the details
3. Your Calendar is updated to show that the Client has shared details with you
4. Give them a call and/or send customized emails to set up a time to meet

You…

During the meeting…

Have a copy of their Shooting Plan, which includes all of the details they shared with you via their Shooting Day Details form, on hand & review the details with your Client.

To print a copy of their Shooting Plan, open the Client's Shooting Day Details form, click on the Shooting Plan link on the top right side of the page, then click on the "Printer Friendly" link & print.

If you have access to a computer during your meeting, you can also make notes directly into their Shooting Day Details form – just be sure not to hide yourself behind the computer. (It may seem impersonal and the purpose of the meeting is to get to know your Client and learn more about their project. ☺)

If they'd like to Contract you…

Congratulations! Confirm the package and package items they'd like to contract you for and let them know you will send them a customized contract to complete and submit online via email. The Contract will clearly detail everything that is include in the package as well as the shooting locations and their contact information. Let them know the Contract is dated and due by X date that you will list on their Contract.

Recommendation: We also provide the Client with a paper copy of our Terms & Conditions. If they have any questions, you can talk through the terms together at the meeting, or send them home with a copy to review.

If you have access to a computer during your meeting, you can create the Contract for your Client and have them complete it on site.

You…

4-6 weeks before the shoot

Send your Client a copy of their Shooting Plan. You can do this very easily via the Client Dashboard simply by selecting the Client, then the "Send Shooting Plan" email action on the bottom of the page.

This will give your Client's an opportunity to confirm the details you have on record for their shoot. If they have any changes or updates, they can do so via their Shooting Day Details form – which is clearly outlined on their Shooting Plan.

4-weeks before the shoot, or when their balance is due

Send your Client a friendly payment reminder via email. You can do this very easily via the Client Dashboard simply by selecting the Client, then the "Balance Due Reminder" email action on the bottom of the page.

The day before the shoot…

Print a copy of their Shooting Plan & pop it in your camera bag. You'll have all of the important details you need on the day of the shoot!

After the shoot…

Upload an image and list a forwarding URL to where you are hosting their images to your Client Gallery!

Attn: Pro Plan Members…

Since you can tailor emails that include data from your Client's record, you can get creative and generate many templates that will help you save lots of time. As an example, we created 2 different graphic email newsletters as a custom email! We have one newsletter that we send to "non contracted" Client's and the other to our Contracted clients! It's a great way to keep folks interested and up to date with your services.

This is just one way you can creatively use the features within Virtual Studio Manager to streamline your business. For more details and suggestions, remember to visit the Support Center as well as our Blog regularly.

Have fun & Thanks for taking the time to review this guide!