THE QUIET PROTOCOL
AI SYSTEMS & AUTOMATION

Booking Readiness Checklist for Small Businesses

Test a booking from mobile inquiry to confirmed calendar entry, then check reminders, rescheduling and staff ownership.

Office managers, schedulers, clinic admins, and service-business owners

GUIDE

Test a complete appointment journey, rather than checking that a calendar link opens. Use a real service type and test contact, then remove the test booking so it does not occupy a customer slot.

TEST RECORD

Service tested: [ ]. Device and browser: [ ]. Entry page or channel: [ ]. Test time and time zone: [ ]. Staff reviewer: [ ]. Booking reference: [ ].

For each check, mark pass, fail or not applicable. Add what happened, who will fix it and how the fix will be retested. Do not turn the check count into a revenue forecast.

BEFORE A SLOT IS OFFERED

- The visitor knows whether this is a confirmed appointment, a request awaiting approval or an estimate visit.
- Service area, duration and prerequisites match the service being booked.
- Required fields are needed for scheduling; sensitive records go through the appropriate intake channel.
- The calendar displays the correct time zone and availability.
- Staff, room, equipment and travel constraints are accounted for where relevant.
- Mobile visitors can complete the form and recover from a missing or invalid field.

CONFIRMATION AND RECEIVING TEAM

- The customer receives the business name, service, date, time or arrival window, location and reference.

- The team receives the same booking status and necessary context.
- A named person owns a pending request, exception or unanswered question.
- A second submission does not silently create a duplicate appointment.
- The confirmation explains what happens next and how to contact the business.

Confirmation draft: "Your [service] is [confirmed/requested] for [date and time zone] at [location]. [For requests: We still need to confirm availability and will reply by the stated update time.] To change the appointment, use [approved method]."

REMINDERS, CHANGES AND CANCELLATION

Confirm reminders use the customer's agreed contact method and contain the correct appointment. Change the test appointment and check that the old reminder is cancelled. Cancel it and check that the slot is released and the team sees the change. Test a reply to a reminder so it reaches someone who can act.

Avoid sending repeated booking prompts after a customer declines or asks to stop. If they request a new date, record that date and owner instead.

FIX REGISTER

Observed failure: [ ]. Effect on the customer or team: [ ]. Likely cause: [ ]. Fix owner: [ ]. Due date chosen by the team: [ ]. Retest result: [ ].

Start with a failed confirmation, wrong slot or unowned pending request before polishing reminder wording. Review a small set of real appointment exceptions after the fix to see whether the same failure still occurs.