WorkflowFence

Practical automation for service businesses

Booking Automation Checklist

Goal: reduce back-and-forth, prevent no-shows, and capture better job details.

1) Booking basics

- Offer 2–3 appointment types only (Quote Call, On-site Visit, Job).
- Set buffers (10–20 min) and minimum notice (4–12 hours).
- Require name + phone + email; optionally suburb/address + job type.
- Include a reschedule/cancel link in every confirmation.

2) Intake (get the info you need)

- Ask 3–6 questions max: job type, urgency, suburb, photos link, access notes.
- For quoting: ask for constraints (timeline) before asking budget.
- If travel matters: validate service area or ask suburb via dropdown.

3) Confirmations & reminders (no-show prevention)

- Instant confirmation (email + optional SMS).
- Reminder schedule: 24h + 2h before.
- Include: address, time, what to prepare, reschedule link.

4) Handoff to CRM

- Create/update contact in CRM.
- Create deal/opportunity with stage = Booked.
- Attach intake answers to the deal notes.
- Create follow-up task if they don't show.

Metrics to track

- Speed-to-lead (minutes)
- No-show rate (%)
- Quote-to-close rate (%)

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