

1. Scheduling process audit checklist

Use this **quick audit** to identify where your scheduling workflow can improve:

- ☐ I currently use a digital calendar (Google Calendar)
- ☐ My team or clients can self-book appointments through Koalendar
- ☐ I don't currently track no-shows or cancellations
- ☐ Reminders are sent manually
- ☐ My booking pages are branded with school colors
- ☐ I rarely review scheduling metrics

Notes / Current challenges:

2. Rules and settings sheet

Define the key parameters for your scheduling system:

Rule / Setting	Your value	Notes
Buffer time between appointments	[X] minutes	Prevent burnout and delays between sessions
Max bookings per day	[X]	Keeps schedule manageable for tutors/instructors
Manual approvals (Y/N)	Y	Only for new students or consultations
Booking cutoff (how far in advance)	6 hours	Prevents last-minute scheduling surprises
Reminders	24 hours before	Send both email and SMS
Cancellation window	12 hours	Flexible but structured

3. Tool setup guide

Follow these steps to configure your scheduling software (such as Koalendar):

1. Connect your calendar to sync real-time availability
2. Set buffer times and booking limits for realistic pacing
3. Enable automated reminders and select message timing
4. Add your brand colors and logo for a professional look
5. Export your bookings to Google Sheets or Excel monthly for analysis

4. Monthly metrics tracker

Track these KPIs to measure your scheduling efficiency:

Metric	Formula / How to Calculate	Month 1	Month 2	Month 3
Utilization rate	$(\text{Hours booked} \div \text{hours available}) \times 100$	80%	85%	88%
No-show rate	$(\text{Missed} \div \text{total bookings}) \times 100$	12%	8%	6%
Scheduling time saved	Estimate hours saved vs. manual method	5 hrs	8 hrs	10 hrs
Conflict count	Number of overlaps or double-bookings	3	1	0
Total revenue impact	Compare monthly earnings before/after	10%	14%	17%

5. Review and adjust

- Schedule a monthly review meeting (30 mins)
- Identify your top 2 wins and 1 improvement area
- Update buffer times, reminders, or booking policies accordingly

Next Review Date: _____

Reviewer(s): _____