Online Booking System Selection Checklist

CLIENT RESOURCE 03

Choosing an online booking system? Start by identifying how your business manages appointments, staff availability and customer communication.

1. Business Requirements

- ☐ Identify which services customers can book.
- ☐ Define appointment durations.
- ☐ Set available business hours.
- ☐ Determine whether multiple staff members need separate schedules.
- ☐ Identify whether appointments require approval or can be confirmed automatically.

2. Customer Booking Experience

- ☐ Mobile-friendly booking process
- ☐ Clear service descriptions
- ☐ Available appointment times
- ☐ Booking confirmation
- ☐ Rescheduling and cancellation options
- ☐ Clear instructions for customers

3. Staff & Calendar Management

- ☐ Individual staff availability
- ☐ Breaks and unavailable dates
- ☐ Prevention of double bookings
- ☐ Calendar synchronization, if needed
- ☐ Administrative access and permissions

4. Payments & Policies

- ☐ Decide whether deposits are required.
- ☐ Identify accepted payment methods.
- ☐ Define cancellation and refund policies.
- ☐ Determine whether taxes or additional fees apply.
- ☐ Check whether payment processing fees fit the business budget.

5. Notifications & Customer Information

- ☐ Email or SMS confirmations, if required
- ☐ Appointment reminders
- ☐ Appropriate collection of customer information
- ☐ Privacy and access controls
- ☐ Data export or migration options

6. Technical & Commercial Considerations

- ☐ Integration with an existing website
- ☐ Mobile usability
- ☐ Subscription and transaction costs
- ☐ Customer support options
- ☐ Reliability and backup arrangements
- ☐ Ability to accommodate future business requirements

7. Selection Worksheet

Business type: .....

Number of staff: .....

Approximate appointments per week: .....

Required integrations: .....

Preferred monthly software budget: .....

Essential features: .....

Optional features: .....

Final Consideration

An existing booking platform may meet your needs without custom development. More specialized workflows may require additional integrations or individually scoped functionality.

WRITTEN ENQUIRIES
Lutfur Digital Studio
https://lutfur.net
hello@lutfur.net