

Calendar Setup Checklist

Availability, buffers, reminders, and connections.

Related week: Week 4 | Related SOP: Choose the right calendar type | Estimated use time: 20-30 min

Use this worksheet before building inside the CRM. Plan the path first, then build only what the plan supports.

Purpose

Use this checklist to plan calendar type, availability, buffers, reminders, booking fields, and CRM connections before publishing a booking link.

When to Use This Template

- ☐ Before creating a new booking calendar
- ☐ Before changing appointment availability
- ☐ Before connecting a calendar to workflows
- ☐ Before adding reminders
- ☐ When bookings are missed or double-booked

Calendar Setup Decisions

Decision	Answer
Appointment purpose	
Calendar type: solo, service, group, round-robin, or collective	
Appointment owner or assigned team	
Duration	
Timezone	
Minimum notice	
Buffer before	
Buffer after	
Maximum appointments per day, if needed	

Availability Map

Day	Available hours	Notes or exceptions
Monday		
Tuesday		
Wednesday		
Thursday		
Friday		
Saturday		
Sunday		

Booking Form and Reminder Checklist

- ☐ Name, email, and phone fields are correct
- ☐ Business name is included only if useful
- ☐ One qualifying question is included only if needed
- ☐ Consent language is included where needed
- ☐ Confirmation message is clear
- ☐ Reminder timing is documented
- ☐ Reschedule/cancel path is clear
- ☐ Internal notification is assigned

CRM Connection Checklist

- ☐ Booking creates or updates the correct contact
- ☐ Booking creates or updates the correct opportunity
- ☐ Correct pipeline stage is used
- ☐ Correct source tag or field applies where needed
- ☐ Correct workflow starts
- ☐ Pre-booking nurture stops when booking happens
- ☐ External calendar sync is tested
- ☐ Test booking completed on mobile

Related Training and SOPs

Related training: Week 4 - Calendars and Appointment Flow

Related SOPs: Choose the right calendar type; Build a safe first workflow; Move opportunities cleanly; Build a lead capture form