

A11

Routine Calendar

Purpose: put every recurring job from the book on one page, each with a time, an owner, a backup and a test for done. The days below are Larkspur's; change them to suit the practice.

PRACTICE _____

DATE _____

WHEN	WORK	CHAPTER AND SHEET	WHO	BACKUP	DONE WHEN
Every morning, before the first client	Read tomorrow's risk flags; send confirmations for bookings _____ days out, and the one follow-up text to tomorrow's unflagged bookings with no answer; read the replies	2, 4 A2, A4			
Every day, by early afternoon	Call tomorrow's flagged bookings that haven't answered, new clients first	4 A4			
Every afternoon	Double-book check on tomorrow's flagged short visits with no answer	9 A9			
Whenever a late cancel comes in	Open the waitlist log first; offer in the log's order	7 A7			
Every booking and every call	The policy, said the way the sheet says it	5, 8 A5, A8			
Every day, at close	Each booking marked kept, no-show, late cancel, early cancel or refilled	1 A1			
Monday	Re-confirm each booking past the far-ahead line whose visit is _____ weeks away, series sessions first	6 A6			
Wednesday	Tidy the waitlist: remove anyone booked or no longer waiting	7 A7			
Friday afternoon	The weekly empty-slot count and the row on the record; the week's doubled slots and the share of bookings past the line beside it	6, 9, 10 A6, A9, A10			
First Monday of the month	The four-week average to the owner; deposit forfeits and declines reported apart; the risk-flag tally filled in; the confirmation text read aloud	2, 4, 8, 10 A2, A4, A8, A10			
Last working day of the month	Call the waitlist rows that never got an offer	7 A7			
Every quarter	Definitions read aloud at the first huddle; slot value redone and the weekly line redrawn if it moved; policy wording checked against every template; flag rules and the far-ahead line reviewed	1, 2, 3, 5, 6 A1, A2, A3, A5, A6			
Every quarter	Deposit and fee checks against the dated rules page	8 A8			
Once a year	Definitions reread and signed; the year's measured rates replace last year's; this page reviewed line by line	1, 3, 10 A1, A3			
Each new hire, first week	Walk the page; do the confirmation run side by side	10, 11			

No client names on this sheet.