Where are bookings getting lost?

Follow the same people from inquiry to first visit. Find one specific issue to fix.

Type in the fields or print. Save your copy; use concise notes and keep details in your records. Start with one service and one inquiry period; keep personal contact details in your normal business system.

1 Define the group you will review

Business / service

Source or campaign

Inquiry dates: from / through

Review date

What counts as an eligible new-client inquiry?

Duplicates / existing clients / exclusions to keep separate

2 Count each person once at each stage

Inquiries (L)

Booked first visit (B)

Attended first visit (A)

Resolved outcomes (M)

Upcoming / rescheduled (U)

Past date, outcome unknown (X)

M includes attended, canceled or missed first visits with no future first appointment pending. Check B = M + U + X; A cannot exceed M, and B cannot exceed L. Do not count repeat visits or repeat messages as new clients.

Look at the actual conversations

Use one record per person. Copy this page for more records; use internal references, not names.

1 Inquiry record

Record ID / source

Inquiry date / time

Useful reply date / time

Booking route

Select...

First-visit outcome

Select...

Appointment date

Exact question, stated objection or unknown reason; next action

2 Inquiry record

Record ID / source

Inquiry date / time

Useful reply date / time

Booking route

Select...

First-visit outcome

Select...

Appointment date

Exact question, stated objection or unknown reason; next action

3 Inquiry record

Record ID / source

Inquiry date / time

Useful reply date / time

Booking route

Select...

First-visit outcome

Select...

Appointment date

Exact question, stated objection or unknown reason; next action

Direct booking can succeed without a conversation. A generic receipt is not necessarily a useful reply. Keep unknown reasons unknown and retain appointment changes in the same record.

Choose one change to test

Use the records to diagnose the problem before buying more traffic or changing several things at once.

3 Calculate and label the snapshot

Booking rate: B / L x 100 (%)

Resolved attendance: A / M x 100 (%)

Lead-to-attendance: A / L x 100 (%)

Next date to review pending outcomes

A zero denominator means N/A, not 0%. Show U and X beside attendance results. These are snapshots of the same inquiry group, not benchmarks; pending outcomes can change the result.

4 Find evidence, then act

Suspected problem and the records that support it

One change to make; what will stay the same?

Measure to review and what improvement would look like

Start date

Review date

For a paid-only group, ad cost per attended new client = matched ad spend / attendees from that group. With zero attendees, record spend and zero attendance; the unit cost is undefined. Keep fees and other costs separately labeled.