Share one booking calendar across several providers

> *“We have three people taking appointments and clients get sent to whoever answers, so the workload is lopsided.”*

Category: scheduling **Setup Time:** ~40 minutes **Estimated Hours Saved:** 2 hrs/week **Direct Software Cost:** $0 / month

SOLUTION SUMMARY

Set up booking that assigns clients across providers automatically, either by even rotation or by who genuinely has availability. Manual assignment produces lopsided workloads and the occasional forgotten double-booking. Automatic distribution spreads the load, still lets clients keep a preferred provider, and stops the front desk arbitrating who takes what.

REQUIRED TOOLS & DIRECT WHOLESALE UTILITIES

- **Your booking system: (Free Tier / Wholesale)**
- **Calendly: (free-tier)**
- **Cal.com: (Free Tier / Wholesale)**

STEP-BY-STEP APPLICATION INSTRUCTIONS

1. **Decide the rule before you configure anything**
   Even rotation, or by availability, or by qualification. Clinics usually need by-qualification, because not every provider can deliver every treatment.

2. **Map which services each provider can actually deliver**
   This is the step people skip, and it is the one that causes a client to be booked with someone not certified for their treatment.

3. **Let clients override to request a specific person**
   Returning clients often want the provider they saw last time. Forcing rotation on them loses more than balanced workload gains.

4. **Connect every provider calendar individually**
   Round-robin using stale availability is worse than manual booking, because nobody is checking.

5. **Set a fallback for when nobody is free**
   A waitlist or an enquiry form. An empty booking page with no explanation reads as closed.

5-POINT QUALITY VERIFICATION PROTOCOL

[ ] **Carrier & Webhook Test:** Confirm webhook listener receives test payload and returns HTTP 200 within 500ms.

[ ] **End-to-End Simulation:** Execute live test event from personal device and verify SMS/email delivery.

[ ] **Anti-Spam & Rate Limit Check:** Verify repeated submissions do not trigger duplicate messages to clients.

[ ] **Direct Ownership Audit:** Confirm all API keys, accounts, and credentials belong directly to your practice.

[ ] **Staff Notification Verification:** Verify practice manager/receptionist receives real-time push alert with dial link.

FREQUENTLY ASKED QUESTIONS

Q: What if one provider is much more in demand?

A: Weight the rotation rather than forcing an even split. Most systems allow priority or weighting, and pretending demand is even just moves the problem.

Q: What does it cost?

A: Often included if your booking system is built for multi-staff businesses. Standalone scheduling tools generally put round-robin on a paid team tier.

Q: Is this worth it for two people?

A: Usually not. Two providers can coordinate directly. The gain arrives around three or more, or when someone is arbitrating assignments all day.