LoftyBiz Booking-Questions and Reminder Template

Ask a few clear questions before anyone can book. Show a price range and a short welcome before the call. Confirm straight away, remind the day before and the hour before, and always offer an easy way to move the time.

Example figures. General education, not financial or legal advice. Results vary. These are examples, not promises. Check the local rules on business texting.

How to use this template

Look at your last ten booked calls and mark the ones that did not happen. Next to each, write your best guess why: poor fit, price shock, forgot, or could not move it. Then fix the biggest cause first. Add two qualifying questions, a price range, or a reminder the day before. Just one change, and count again in a month.

Part 1 — Qualifying questions (before anyone can pick a time)

Four short questions are enough. Every extra question costs you good bookings too. Worked example from the video: Ignatius, a kitchen remodeling company in Murfreesboro, asked the four questions below before anyone could book a free design visit. That is an example, not a rule for your business.

#	Question (edit these to fit your work)	Why it helps
1	Do you own the home?	Confirms they can go ahead on the property.
2	Roughly when would you like the work done?	Shows whether the timing is serious.
3	What's your rough budget range?	Gives a rough budget range before you travel.
4	What's the one thing you most want to change about your kitchen?	Tells you what matters most, so the visit is useful.

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Part 2 — After they book: price range and a short welcome

Show a clear price range on the confirmation page, so anyone shocked by the number can cancel quietly instead of not turning up. Then send a short, plain welcome (under two minutes in the worked example): who will come, what you will do, how long it takes, and what they should have ready. Do not record a polished advert. Worked example: most kitchens Ignatius did landed between eighteen and forty-five thousand dollars. Your range must be your own figures, not this example.

Item	Your wording (write it here)
Price range on the confirmation page	
Welcome video or note: who comes	
What you will do, and how long it takes	
What they should have ready	

Part 3 — Three reminders, and an easy way to move

Worked example: Odalys, a small web design agency in Kenosha, wrote three messages herself so they sounded like a person, and added a reschedule link. After a quarter, about nine in ten booked calls were happening, up from about three in four. These are examples, not promises.

When	What to say (edit the wording)	Include
The moment someone books	Confirm the day and time in their own time zone. Repeat what the call is for in one sentence. Ask them to reply with a quick yes.	Time zone, purpose, a yes to reply
The day before, as a short text (or email if they prefer)	Looking forward to our call tomorrow at [time]. Here is the link. If the time no longer works, here is how to move it.	Time, link, reschedule link
An hour before	The link again, and nothing else.	Link only
If they have not joined after three minutes	We're on the call now — joining soon, or shall we find another time?	Friendly, and a way to move

Texting rules checklist (do this before you send texts)

Check	Done?
Ask each person at booking whether texts are fine; use email for anyone who prefers it.	■
Every text gives a clear way to stop receiving messages.	■

The wording follows the local rules on business texting. Check those rules yourself; this is not legal advice.	■

Your last ten booked calls (mark the no-shows)

#	Date	Who (initials only)	Happened?	Best guess why (poor fit / price shock / forgot / could not move it)	What you will change
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					

Three mistakes to avoid

1. Asking ten questions when four will do. 2. Hiding the price until the visit, which invites the shocked no-show. 3. Recording a polished advert instead of a plain, friendly welcome.

Systex is our own product. You can keep each contact, the call date and the next follow-up in one list at loftybiz.net.

Example figures. General education, not financial or legal advice. Results vary. These are examples, not promises. Check the local rules on business texting. Companion download for LoftyBiz 118 — Fewer No-Shows: Get Booked Calls to Actually Happen.