

Scope of Work - ABC Salon Reservation

Version v1

Status Planning

Date November 9, 2025

Client ABC Salon

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Prepared by Forward Deployed Engineer

1. Project overview

Purpose

Deliver a voice assistant that answers inbound scheduling calls, collects required booking details with high accuracy, and writes outcomes to the internal scheduling system.

Approach

Build a guided call flow that identifies intent, gathers fields, confirms with the caller, and completes actions through salon system APIs. Keep the experience friendly and natural, keep scope focused on reservations only.

2. Objectives and success criteria

Objectives

- Support the four intents, new reservation, modify, confirm, cancel
- Check availability and commit changes through the salon system
- Capture and return the structured outputs listed in the specification

Acceptance criteria

- Completion rate at or above ninety percent for calls that reach the assistant
 - Data accuracy rate at or above ninety percent across required fields
 - Average handle time is recorded and trendable from the first week of tests
 - Exception routing to a human for requests outside menu or scope
 - Successful API writes for created or modified bookings with verifiable payloads
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3. Scope of work

In scope

- Voice call intake for inbound calls via webhook entry
- Intent handling for new, modify, confirm, cancel
- Field collection, name, phone number, date, time, service, stylist preference
- Availability checks using check_availability
- Booking operations using add_reservation, modify_reservation, cancel_reservation, get_reservation
- Caller confirmation prompts before any final action
- Exception handling that transfers to a human when the request is out of scope or when a service is not in the menu

- Output of call results as the structured payload defined in the specification
- Call classification as booked, no answer, voicemail, wrong number
- Recording of analytics, connection rate, completion rate, handle time, data accuracy

Out of scope

- Outbound calling campaigns
 - Product or pricing conversations
 - Payments and deposits
 - Marketing messages and promotions
 - Channels other than phone, for example chat or messaging
 - Notifications content and distribution, currently none by specification
 - Use of live integrations that are not listed in the specification
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4. Deliverables

- Call flow design and annotated script aligned to the prompts and tone guide
 - Configurable prompt set with variables, salon_name, agent_name
 - API contract, request and response mapping for check_availability, get_reservation, add_reservation, modify_reservation, cancel_reservation
 - Working voice assistant that runs against a staging instance of the salon system
 - Exception transfer to a human representative per the rule in section four of the specification
 - Data payload emitter that outputs the example structure with field validation rules
 - Call classification logic and logs
 - KPI dashboard starter, completion rate, handle time, data accuracy, connection rate
 - Test plan and test report with ten or more scripted scenarios that mirror the examples
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5. Technical requirements

Entry and triggers

- Inbound or outbound flag is supported, phase one uses inbound
- Webhook entry and optional file upload trigger for test harness
- System availability message when platform errors occur

Data inputs available to the agent

- Caller phone number, system field phone_number
- Caller name, preferred date and time, service menu, stylist preference, captured during the call

System integration

- Internal scheduling system via API, tentative during PoC
- New or modified schedule information sent after confirmation
- Authentication and endpoint configuration provided by the client

Outputs

- Final payload structure as in the specification, customer_name, phone_number, reservation_date, reservation_time, stylist_name, service_menu, notes
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6. Experience requirements

Tone and style

- Warm, natural, calm, patient, short phrases, everyday time phrases
- Light filler is permitted to sound natural, used with care
- Always ask, never assume service or stylist
- Spell back alphanumeric information when confirming

Call handling rules

- Never finalize without verbal confirmation
 - Stay on scheduling only
 - If asked whether the agent is AI, acknowledge politely and continue
 - If the system is unavailable, inform the caller and ask to call again later
 - Always let the caller finish before responding
 - If misheard, ask to confirm again
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7. Exception handling

Rule

When a caller asks for anything other than new, modification, cancellation, or confirmation, or asks for a service not in the menu, cut, color, treatment, transfer to a human representative.

8. Data recording and classification

Recording

- Register call outcomes to the in house system via API for each data item listed
- Use the payload structure shown in the specification

Classification

- Booked, appointment successfully created or modified
 - No answer, ring only, no voicemail
 - Voicemail, connected to voicemail, no live response
 - Wrong number, third party indicates the number is not the intended customer
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9. Analytics and KPIs

Metrics to compute

- Connection rate, percentage of calls that reach a human
- Completion rate, percentage of calls that collect all required fields
- Average handle time, seconds per completed call
- Data accuracy rate, percentage of fields validated as correct

Reporting

- Provide a simple report or dashboard view and a daily export during PoC
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10. Project plan and timeline

Timebox

Four weeks from kickoff

Milestones

Week one

- Confirm API access and data mapping
- Finalize call flow and prompts
- Build stubs for availability and booking operations

Week two

- Implement the voice assistant with confirmation logic
- Wire API calls for check_availability and get_reservation
- Internal dry runs and prompt tuning

Week three

- Enable add_reservation, modify_reservation, cancel_reservation
- Run scenario tests that mirror the example scripts
- Capture metrics and payload samples

Week four

- Bug fixes and tuning
 - Final test report and KPI snapshot
 - Readout and go or no go recommendation for production hardening
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11. Roles and responsibilities

Client, ABC Salon

- Provide API credentials and staging environment
- Approve prompts, tone, and confirmation wording
- Supply operating hours and service menu
- Join scenario tests and confirm outcomes

Forward Deployed Engineer

- Own call flow design and implementation
 - Map data to the payload and salon system APIs
 - Configure analytics and logs
 - Run tests and deliver the final report
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12. Assumptions and constraints

Assumptions

- Menu includes cut, color, treatment, stylist preference is optional
- A staging API is available for read and write
- Example scenarios in the specification represent common cases

Constraints

- No notifications content required in this phase
- No outbound calls required in this phase
- English and Japanese names must be handled and spelled back clearly
- Personal information is handled only for the time required to complete the call and the API write

13. Dependencies

- Internal scheduling system endpoints must be reachable from the assistant environment
 - Webhook entry and telephony integration are available or simulated for testing
 - Client availability for prompt review and scenario sign off
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14. Quality and acceptance

Functional tests

- Ten or more calls across new, modify, confirm, cancel, include one system error case and one exception transfer

Data tests

- Payload fields populated and validated for each successful call
- API responses logged and recoverable for audit

Acceptance

- All acceptance criteria in section two are met
 - All deliverables in section four are provided and approved
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15. Risk management

- Older callers may struggle with IVR steps, mitigation, minimize steps, prefer natural language, provide transfer to human
 - API latency may increase handle time, mitigation, cache availability options for a short interval during the call, keep the caller engaged with natural confirmations
 - Ambiguous time phrases may cause errors, mitigation, always rephrase and confirm day and time explicitly

16. Change control

Any feature beyond this Scope of Work, for example outbound campaigns, pricing conversations, payment capture, marketing messages, or multi channel support, will be raised as a change request with impact on time and budget, work begins after written approval.

17. Sign off