TailorBook Needs and Requirements

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Data Collection:

The data collection for this project was twofold. Firstly, a Google form questionnaire was designed to gather direct feedback from small business owners. The goal was to understand the tools they currently use, if any, and their specific needs for booking systems. This involved three parts: identifying whether a respondent already uses a website or booking tool, exploring the most and least helpful features of their current setup (or their preferences if they don't have one), and gathering some basic information about their business or service. The second approach focused on market research. By analyzing the features of top scheduling apps, particularly those highlighted in Kimberlee Leonard's Forbes article "Best Scheduling Apps (2024)," the team could discern industry standards and trends, ensuring that their own project could meet or exceed these benchmarks. This combination of firsthand feedback and market analysis enabled the team to design a solution aligned with user needs and industry practices.

Results:

From our data collection, we found some important trends. Real-time booking is the most important feature, as it helps avoid double bookings, which can frustrate both customers and business owners. In a similar vein, reminder emails or texts were regarded heavily both by the services we researched and the small business owners we heard back from. However, we noticed that many current booking services only offer unlimited confirmation and reminder emails in their more expensive payment plans, which is a major downside.

Integration with tools like Google Calendar is highly touted by booking services, as it allows for easy scheduling and simple crossover with tools that are already broadly used. Most services similarly allow one to manage bookings from any device, either through mobile apps or mobile-friendly web experiences. Finally, we noticed that most of these services offered a clean, minimalist design to their services, with very little clutter.

Responses to the questionnaire (or in some cases, personal conversations related to the questions) emphasized a need for accessibility and simplicity. The piano teacher we spoke to in particular said that if the service were to take more than two minutes on her phone to get to what information she needed, she wouldn't use it - her existing tools, mainly text with her students or their parents, work well enough quickly enough to not justify use of another tool unless it proves to be faster and better organized.

With these results in mind, we developed a set of needs and requirements that we feel must be met to bring this tool to life and make it useful for our target audience.

Needs and Requirements:

User Capabilities –

There are two primary groups we aim to serve with TailorBook: small business owners and their customers. Through our questionnaire responses and research into existing tools (like those listed in Kimberlee Leonard's Best Scheduling Apps article), both groups have distinct needs that we must address.

Customers require:

Real-time booking: Based on our survey, customers and business owners both highlighted the frustration caused by scheduling conflicts and double bookings. This feedback aligns with our research on existing booking tools, where real-time booking

functionality is a key feature. Offering real-time booking will ensure that customers can easily see available times and avoid conflicts, which was the top priority among both our respondents and the tools we researched.

Timely reminders (email/SMS): From the responses we gathered, reminder notifications—whether through email or text—were seen as highly valuable. Many respondents emphasized the role of reminders in preventing missed appointments. Similarly, our research found that most popular booking tools offer reminders, though some restrict unlimited reminders to higher-tier plans. TailorBook will address this by offering customizable reminder options through email or SMS, ensuring customers can select their preferred method of notification, making the process seamless.

Cross-device compatibility: Both our survey and research pointed out the increasing importance of mobile-friendly functionality. For example, the piano teacher we spoke to mentioned that if the booking process took more than two minutes on her phone, she wouldn't use it. Other platforms also emphasize mobile responsiveness as a critical feature for accessibility. To meet this need, TailorBook will ensure that customers can easily book, modify, or cancel appointments from any device, whether it's a smartphone, tablet, or desktop computer.

Business owners need:

Scheduling control and customization: Our survey respondents, especially those without existing booking tools, expressed the desire to have full control over their availability. This includes the ability to block off time, set recurring availability, and adjust hours based on their needs. From our research, we noticed that most scheduling tools offer some form of availability management. TailorBook will allow business owners to modify their schedules in real-time, ensuring they can update their availability instantly and avoid overbooking.

Branding and customization options: From the conversations we had, business owners emphasized the importance of tailoring their booking page to reflect their brand, including the ability to modify the appearance with logos, colors, and business-specific information. Existing tools also highlight this feature as a major selling point. TailorBook will provide easy-to-use customization options, allowing owners to adjust the appearance of their booking site to match their branding and make it more appealing to their customers.

Service, pricing, and content management: Business owners also expressed the need to have control over their service listings, pricing, and the content displayed on their pages. Many owners we spoke with, such as barbers and photographers, wanted the ability to update their service offerings and prices on the fly. TailorBook will feature an intuitive dashboard that allows business owners to easily add, remove, or modify services and prices, as well as upload photos or adjust descriptions—all from one centralized location.

Functional Requirements –

Real-time booking is our top priority, allowing customers to avoid scheduling conflicts and potential double-booking issues. To do this, we will have a database table of appointments that syncs up with the calendar integration the moment an appointment is booked. Additionally, the system will need to send appointment reminders in customizable formats, such as email or text, so users can choose what works best for them. Several APIs exist to manage scheduled and automated sending of reminders through those media.

Ensuring that all features of the booking site are easily accessible on mobile devices will increase the traffic of customers, and utilizing a payment API to collect card information ahead of the appointment will help eliminate potential no-shows.

Data security is also essential, especially when handling user information like payment and contact information and appointment details.

Business owners should be able to easily manage their schedules by adjusting their hours, blocking off time, and reviewing bookings in real-time. They must be able to edit the services they offer, the prices of those services, and the descriptions and images attached to them at any time. Additionally, they need to be able to control what business information is shown on the landing page of the site, as well as what logos, images, and color schemes are used throughout. All of these features will be included in their owner dashboard, with appropriate information being stored in the backend database and used where requested on the customer site.

Nonfunctional Requirements –

The booking system needs to perform efficiently across all platforms, including smartphones, tablets, and desktop computers, without significant lag or delays. Simplicity is key—users should be able to access core features quickly without navigating through cluttered menus. We plan to study related design principles to help us plan out the pages we create, drawing attention and emphasis to the correct areas. Additionally, introducing site translations to different languages will be a crucial boon in certain areas, allowing the business owner to broaden their customer base.