

EVALUATION WORKSHEET · 1 OF 3: YOUR WORKFLOW AND COSTS

Booking software evaluation worksheet

BEFORE YOU TEST

A feature is not confirmed merely because a logo appears on a sales page. Test the version and plan you would buy. Use fictional records only. If your work needs a particular legal or privacy arrangement, verify it directly before entering real client information.

Your workflow

In-person/remote

☐ In person ☐ Remote ☐ Both

One practitioner/team

☐ One practitioner ☐ Team

Monthly bookings

Locations/calendars

Packages

Data sensitivity

Must-have features

Cost of each option

Cost item	Provider A: _____	Provider B: _____	Provider C: _____
Plan			
Monthly payment			
Annual payment			
Transaction charges			
Add-ons			
Migration/setup			
Export/cancellation costs, if any			

Requirements comparison

For each requirement: pass / fail / not tested / not applicable, with the exact evidence date and URL or test note. Unknown is not a pass.

Requirement	Provider A: _____	Provider B: _____	Provider C: _____
Booking			
Reminders			
Forms			
Consent process			
Payment/refund			
Package tracking			
Access permissions			
Export/delete			
Accessibility			
Support			

[Practice name]

Test log (fictional records only)

Test	Provider and plan	Result	Date	Evidence or note
Book on phone				
Reschedule				
Cancel				
Pay/refund				
Complete a fictional form				
Retrieve receipt				
Export sample data				

Decision

Hard blockers

Tradeoffs

Chosen plan

Cancellation date for trials

Reviewer/owner

Customization checklist

- ☐ Failing a must-have means the product is not eligible for this decision.
- ☐ Unknown is not a pass.
- ☐ Choose the simplest adequate option after checking full costs.
- ☐ Do not recommend a paid upgrade solely because the provider offers an affiliate reward.
- ☐ Keep this worksheet with your business records; it contains no client information.

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