

Shop Procedure	Date: May 2023	Revision: 0
Title	Mindbody and Homebase App Utilization	

Purpose:

The purpose of this shop procedure is to provide understanding of how the skoah Facial Shop Krew uses Mindbody Business Online (MBO) and Homebase Applications to manage krew work schedules and appointment bookings.

Mindbody:

Mindbody is a Point of Sale (POS) app skoah, as a brand, requires shop owners to use for scheduling appointments, transacting services, collecting customer information, and even marketing to our customer base using email lists. In this procedure, the term “smart booking” in Mindbody is defined and what the Facial Shop Owner’s (FSOs) expectations are of krew relative to the app.

Smart Booking:

Smart booking in the context of Mindbody and this shop means optimizing the schedule so that there is very little “gray” space or open spots on the schedule to book in. Skin Care Coaches (SCC) (as directed by Shop Management) should always fill the “gray space” first (for example, if Skin Care Trainer is booked for 10:00 and has nothing else is on the books, the SCC, should book the next appointment at 11:00 or 11:30 depending on the length of the 10:00 appointment).

Below is an example of “Not” Smart Booking. Referencing Skin Care Trainer (SCT) Molly’s schedule, her books include too many open gray spaces between appointments. There are several reasons the books may look this way, such as, the customer’s availability for the appointment, etc., however, regardless, the SCC should consider all the factors of smart booking prior to adding the customer to the books. The SCC should always try and have the customer work with the shop’s schedule and not the other way around whenever possible.

Another “not” Smart Booking “mishap” in the example below is booking a 5:30, 45-minute, facial appointment. This prevents any other evening appointments from booking on the schedule. It would have been better or “Smarter” to book the appointment at 5:00 or 6:00 to allow for other appointments to book around it.

Today Thu May 11, 2023				
Day Week				
All service categories				
All estheticians				
Tools				
+ Add	Molly C. / SCT	Kayla F. / SCT	Stefania G. / SCC	Kennedi W.
8:30 AM				
9:00 AM				
9:30 AM				
10:00 AM				
10:30 AM		10:00 AM - refresh hydrafacial Morgan D		
11:00 AM	11:00 AM - facialisious facial Dana S			
11:30 AM				
12:00 PM		12:00 PM - refresh hydrafacial Devan H		
12:30 PM	12:30 PM - facialisious facial Gardner M			
1:00 PM		1:00 PM - Break LUNCH B		
1:30 PM				1:30 PM - facialisious facial Ana Belen Z
2:00 PM	2:00 PM - Break LUNCH B	2:00 PM - slow n' oo hydrafacial Emily F		
2:30 PM		2:30 PM - facialisious facial Emmeline C		
3:00 PM				
3:30 PM				3:30 PM - facialisious facial Erin A
4:00 PM				
4:30 PM				
5:00 PM				
5:30 PM	5:30 PM - skulpt & tone Anne K			
6:00 PM		6:00 PM - power facial Kacey B		
6:30 PM				
7:00 PM				
7:30 PM				

Smart booking at no time means moving appointments around to suit an SCTs or SCCs preferences. Preventing a booking from scheduling in or moving an appointment to allow an SCT or SCC to leave early, for example, (unless approved by Shop Management) will be subject to immediate termination.

Mindbody Business:

Before each shift, SCTs are required to check the app to ensure that their report time matches the report time in Homebase. If the two start times do not match, the SCC is required to contact the Facial Shop Manager (FSM) and report the discrepancy.

There are occasions where the SCTs schedule in MBO may be different than the SCT's schedule in Homebase. This is usually when:

- SCT doesn't have start of shift booking in MBO, but may still be required to come in at the Homebase report time or
- The scheduled hours are longer in Homebase, but shorter in MBO as SCCs and/or FSM are Smart Booking SCT appointments and are attempting to cluster the appointments so that there is very little gray space as possible. In this case, the SCT's schedule in Homebase may be adjusted. *In this context, Smart Booking means blocking the SCTs schedule off intentionally in MBO to prevent morning appointments and evening appointments booking with nothing in between.*

Should only the last ½ of the SCTs schedule be booked, this may result in the SCTs hours being eventually reduced in Homebase.

Homebase:

The Homebase app is used to schedule krew members start and end times. It is also the app the shop uses to clock in and out of shifts. SCCs, SCT and FSM are scheduled in Homebase. FSM is responsible for creating the schedules in Homebase.

- Scheduling Overview - Schedules are published monthly; however, updates or changes to any krew member's Homebase schedule may occur during the month for a variety of reasons. Changes to schedules will be published and all krew members affected by the change will be notified.

When changes are needed within 24 hours of report time, krew members will be contacted using the 3 points of contact method - phone, text and Homebase for notification of any changes or updates to their shift. FSM or designee should indicate in the Daily Summary when these notifications are made.

- Shift Availability – While the preference is for schedules to stay as static as possible, all full-time krew are required to have open availability unless they have made prior accommodation with FSM. Part time krew must share their availability using the Homebase app.

Communication is Key:

Management is required to check schedules daily and confirm that report times are accurately reflected in both applications; however, mistakes in schedules do happen and common sense and communication is key to clearing up any confusion.