

Client scheduling and appointment management

Automatically processes new client service requests by scheduling appointments, optimizing routes, and confirming details with clients. This streamlines booking operations and ensures efficient staff deployment while maintaining high service standards.

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WORKFLOW TRIGGER

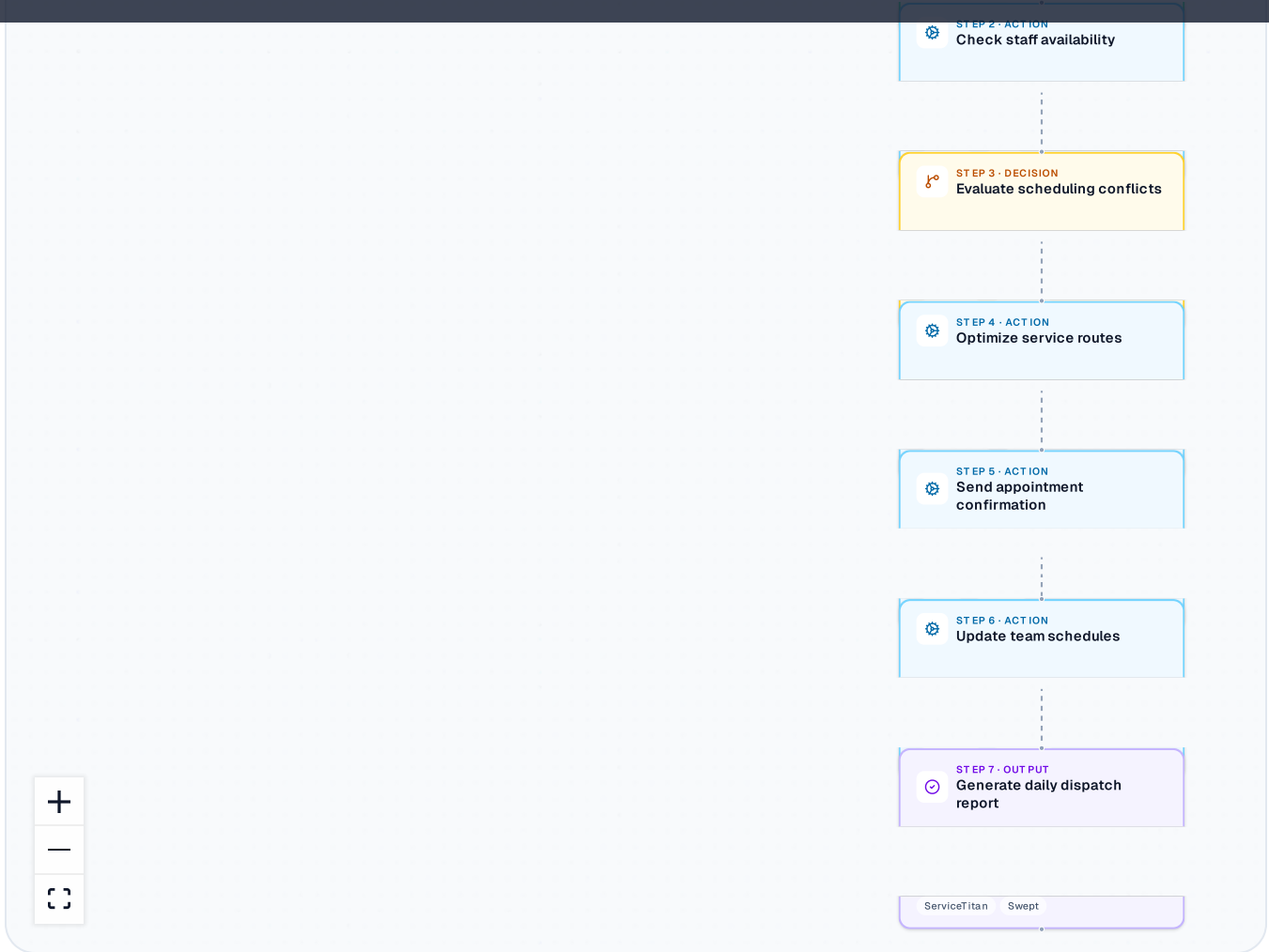


New cleaning service request submitted through online booking form or client portal

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.

STEP 1 - TRIGGER
Receive service request



Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Receive service request

Client submits cleaning service request with property details, preferred dates, and service type. System captures all booking information and client contact details.

ServiceTitan Jobber

2

 ACTION

Check staff availability

System queries staff schedules and skill sets to identify available cleaning teams for requested time slots. Matches service requirements with qualified personnel.

ZenMaid Swept

3

 DECISION

Evaluate scheduling conflicts

Determines if preferred appointment times are available or if alternative slots need to be offered. Branches workflow based on availability status.

CleanGuru ServiceM8

4

 ACTION

Optimize service routes

Calculates most efficient travel routes between client locations for assigned cleaning teams. Minimizes drive time and fuel costs while maximizing daily service capacity.

ServiceTitan Swept

5

 ACTION

AI Business OS

Send appointment confirmation

Automatically sends confirmation email/SMS to client with scheduled time, assigned team details, and service checklist. Includes payment links and special instructions.

Jobber

ZenMaid

6

 ACTION

Update team schedules

Pushes confirmed appointments to cleaning staff mobile apps with property access codes, client preferences, and equipment requirements. Syncs calendars across all platforms.

ServiceM8

CleanGuru

7

 OUT PUT

Generate daily dispatch report

Creates comprehensive daily schedule report for supervisors with team assignments, route maps, and client contact information. Includes backup staff assignments for contingencies.

ServiceTitan

Swept



Outputs

AI Business OS

- Confirmed cleaning appointments with optimized schedules
- Client confirmation notifications with service details
- Team dispatch reports with routes and assignments



Key Metrics

- Appointment booking conversion rate
- Average scheduling response time
- Route optimization efficiency percentage



Tools & Integrations

- ServiceTitan
- Jobber
- CleanGuru
- ZenMaid
- Swept
- ServiceM8

AI Business OS

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