

Research Brief

Should a 14-person professional-services firm replace its standalone scheduling tool with the appointment scheduling already included in its workspace?

Prepared September 4, 2026 / 5 independent AI lenses / claims checked

THE SHORT ANSWER

Run a two-week replacement pilot before renewing the scheduling subscription. The firm already owns the core calendar capability, and the sample workflow data suggests most bookings are simple enough to migrate. Keep the existing link active during the pilot so no client meeting is put at risk.

01 RECOMMENDATION

Proceed with a controlled pilot for one booking type: the 30-minute discovery call. Recreate its availability rules, confirmation language, and reminders inside the existing workspace. Route only new website traffic to the pilot link; keep every older link and automation unchanged until the team verifies the full path.

02 WHERE THE MODELS AGREE

All five lenses favored a reversible test over an immediate switch. They agreed that consolidation only creates value if the client experience remains smooth, the team can still see ownership clearly, and the two existing downstream automations continue to fire. They also agreed the firm should measure successful bookings and staff intervention, not merely whether the new page can accept an appointment.

03 WHERE THEY DISAGREE

Three lenses would migrate all simple meeting types after one successful week. Two preferred a full two-week observation window and one renewal-cycle overlap. The faster path saves money sooner; the slower path better protects against missed reminders, reschedules, and old links embedded in email signatures.

04 UNCERTAINTY FLAGS

The sample inventory does not confirm whether round-robin assignment is required. It also does not include cancellation rates, no-show rates, or every place the current booking URL appears. Those gaps do not block the pilot, but they do block a full replacement decision.

05 NEXT MOVES

1. Build one discovery-call booking page in the existing workspace.
2. Mirror the current availability, buffer, confirmation, and reminder rules.
3. Test booking, rescheduling, cancellation, and mobile confirmation with an internal address.
4. Send 25 percent of new website traffic to the pilot for two weeks.
5. Compare successful bookings, staff touches, no-shows, and client questions.
6. Replace the subscription only after the old integrations and embedded links are inventoried.

CLAIMS & SOURCES

CLAIM	CHECK	SOURCE
The current scheduling subscription costs \$144 per year	Sourced	Company billing export (illustrative)
Nine in ten bookings are 30-minute discovery calls	Sourced	Booking activity export (illustrative)
Two downstream automations use the current booking event	Sourced	Workflow inventory (illustrative)
Round-robin assignment may be required	Model-asserted	unverified
A two-week pilot is sufficient to expose every edge case	Model-asserted	unverified

HOW TO USE THIS BRIEF

Treat agreement as signal—not certainty.

The lenses answered independently. Conny compared their reasoning, surfaced conflicts, and separated sourced claims from model assertions. Before acting, verify the uncertainty flags with the person who owns the workflow.

BEST NEXT CONVERSATION

What evidence would change this recommendation—and who can supply it fastest?