



Building a strong foundation for **booking & scheduling**

For booking agents & schedulers

spare

WHY THIS SESSION EXISTS

Day of service success before **the day starts**

Most OTP and productivity problems
aren't day-of-service problems.

WHAT YOU'LL LEAVE WITH

Three things to take back to your desk

01

Understanding how demand & supply actually behave.

The shape of your day, not just the volume.

02

Habits to bake into every booking.

Notes, profiles, favourite locations

03

The Spare tools doing the heavy lifting.

Trip Negotiation Booking Intelligence.

PART ONE

**The basics that
quietly break the
day of service**

01

Never skip the basics

Clean data at booking is the cheapest insurance you'll ever buy. Every shortcut at the desk becomes a ten-minute problem at dispatch.

Three things to get right, every trip, every time. ↓

PICKUP & DROPOFF NOTES

Notes are not optional

- Gate codes, building entrance, apt number
- Access details — "ring buzzer 4B, side door"
- Anything the driver would wish they knew

NO NOTES

+12 min at curb

Patricia W. · pickup 8:45 AM

142 Birch Apartments

(no notes — the driver will find out the hard way)

GOOD NOTES

on time, clean handoff

Patricia W. · pickup 8:45 AM

142 Birch Apartments · Unit 4B

Pickup: Buzzer 4B. Slow boarding. Side entrance off Maple — gate code **2418#**.

Dropoff: Drop at clinic east entrance, not main lobby.

10:05



📍 Main & Cambie, NW Corner

Only park on Main St, do not stop on Cambie because there's no room there.

No-show in 5:00



📧 Pickups notified of your arrival



Marvin Wayne

2048 • 1 Adult, 2 Children • 1 Wheelchair

📄 Gate code 6654, Flat 6, easiest to park in side street.

💰 Cash • \$2.50

[Change](#)

Complete Pickup


Info

Cancel

[+ Add Rider](#)

Clean profile equals clean schedule

- Verified **pins** beat typed addresses every time
- Confirm **mobility aid**, service animal, PCA
- Language preference & comms channel
- Right **service type & fare** — at booking, not the curb

 **Patricia Williams**
Rider ID · 10482 · since 2021

HOME ADDRESS	MOBILITY
● Verified pin	Walker · slow boarding
PCA	LANGUAGE
None on file	English
COMMS	SERVICE · FARE
SMS preferred	Paratransit · \$4.00

● Profile reviewed · 18 days ago

VERIFYING ELIGIBILITY

Verify eligibility in one click

- Open **Rider Requirements** right from the trip
- See which conditions & restrictions apply
- Confirm the rider qualifies **before** you book

✓ Eligibility conditions are met.

 View

IF YOU REMEMBER NOTHING ELSE

The non-negotiables

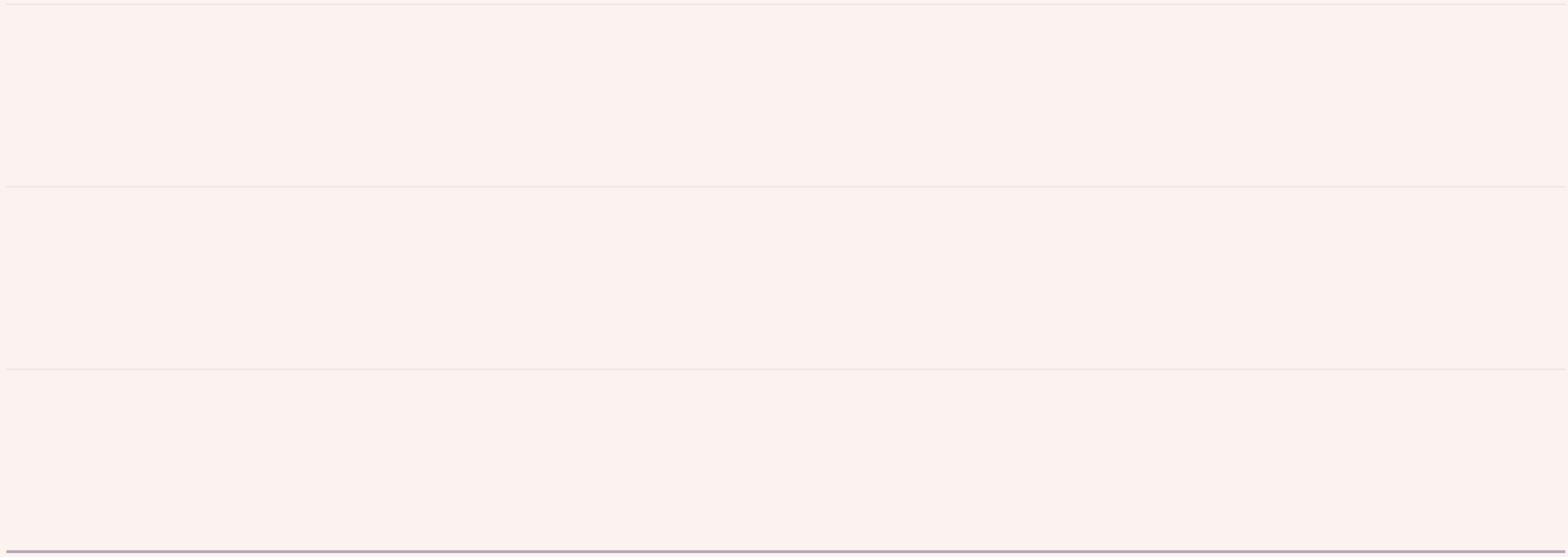
- Pickup note on every trip
- Dropoff note on every trip
- Verified address
- Mobility aid confirmed
- Correct service type & fare

PART TWO

Understanding demand & supply

02

TRIP VOLUME



6a

9a

12p

3p

6p

9p

|| Pause

spare

READING YOUR DEMAND CURVE

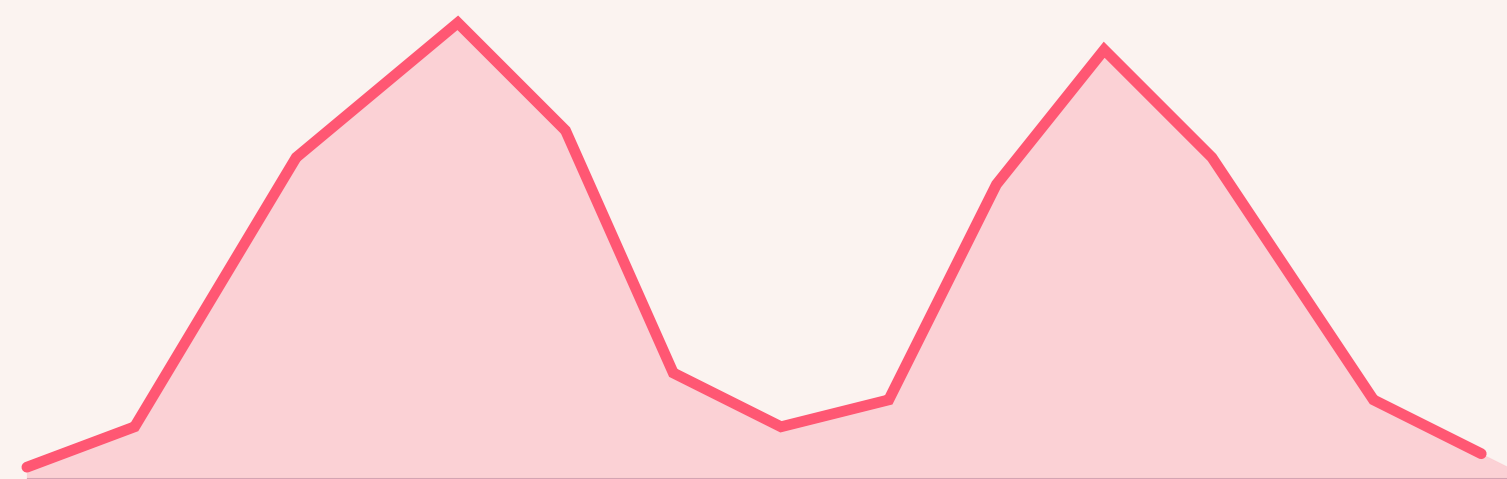
Read the shape, not just the volume

FLAT DAY 300 trips · manageable



Demand spread evenly. Drivers stay busy, no crunch.

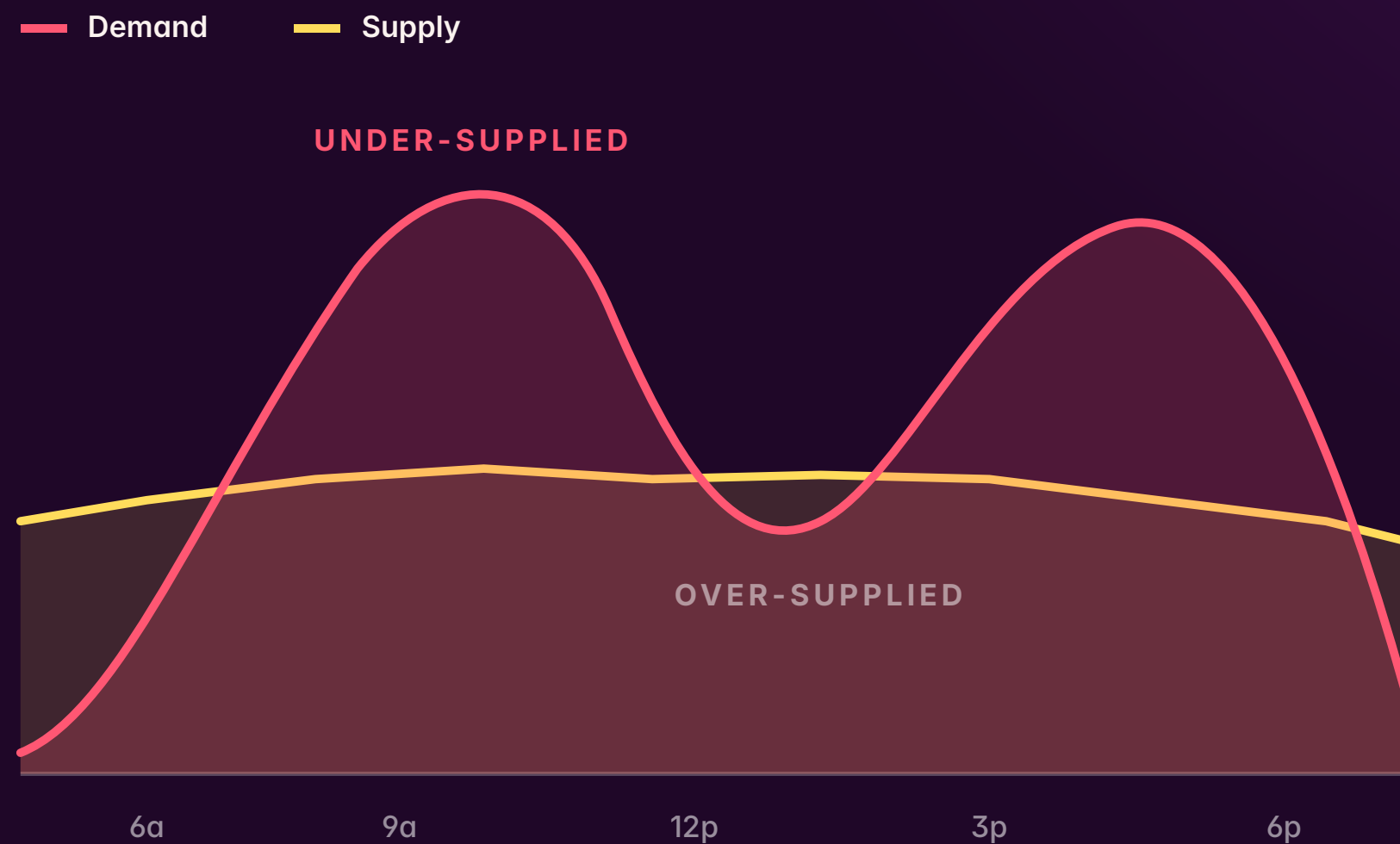
SPIKY DAY 300 trips · brutal



Same trips, concentrated. Peaks overwhelm the trough.

MATCHING THE CURVES

Supply has a shape too



Having **enough vehicles** isn't the same as having the right vehicles at the right hours. Mismatched shape means idle drivers in the trough — and missed trips at the peak.

PART THREE

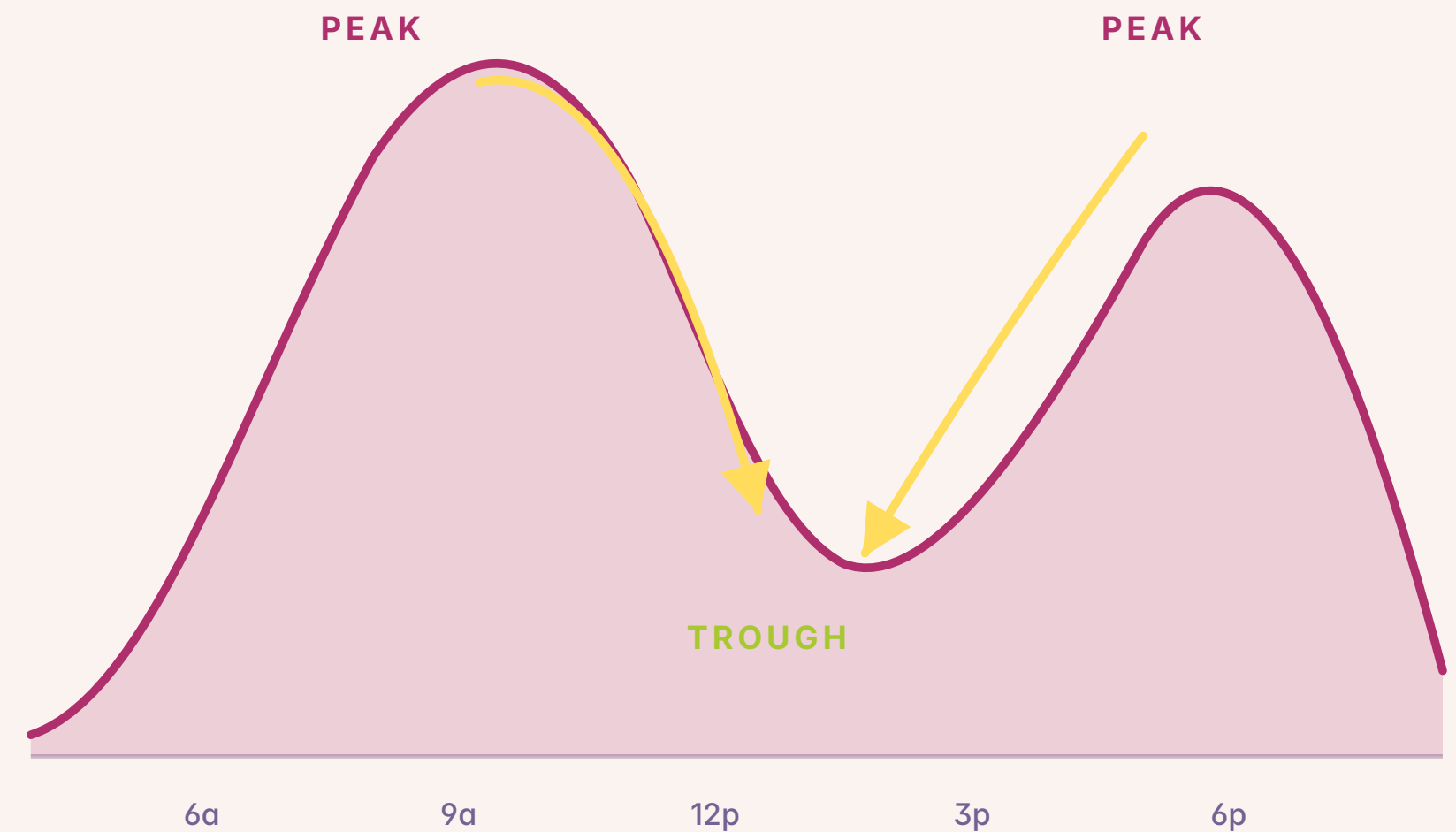
Trip negotiation — shaping demand

03

REFRAME

Negotiation is **demand shaping,** not compromise

Every negotiated window is a chance to smooth the peak. Done well, riders don't feel negotiated with — they feel taken care of.



WHEN TO NEGOTIATE, WHEN TO HOLD

Know when to push. Know when not to.

GO Negotiate toward the trough

- Flexible trips — shopping, social, non-urgent medical
- Rider has expressed flexibility
- The peak is already saturated

HOLD Hold the line

- Medical appointments with fixed times
- Work or school commitments
- Rider has indicated the time is firm

Recommended ⓘ **\$2.75** On Time

6:30 AM – 6:45 AM Pickup • Ride for 8 – 18 min

↑ **Pickup at 300 Linden Ponds Way, Hingham, MA**
Estimated 6:30 AM Earliest 6:30 AM, latest 6:45 AM
Ride for 14 min • 3 mi • Fixed route is 37 min slower

↓ **Dropoff at 199 Lake St, Weymouth, MA**
Estimated 6:43 AM Earliest 6:37 AM, latest 7:02 AM

6e84129e Log Denial Create Request

More options ▲

|| Pause

LOGGING DENIALS

Log every denial

- Track when a rider **can't get** the ride they wanted
- Pick the type, add a note **while it's fresh**
- Feeds compliance reporting & capacity planning

Log A Denial

× Close

Denials are used to track times when a rider is either unable to get a ride, or is unable to get the type of ride they wanted.

Type (Required)

No vehicle available at requested time ▼

Notes

Rider requested 8:00 AM dialysis pickup — all AM peak vehicles committed. Offered 9:15; rider declined.

Log Denial

PART FOUR

Booking Intelligence — your copilot

04

BOOKING INTELLIGENCE

The alerts that catch mistakes at booking

BOOKING INTELLIGENCE

The system catches what humans can't

80

bookings a day per agent

200

variables per booking

0

humans who can hold it all in their head

Your judgment + the system's pattern recognition = faster, better bookings.

HOW TO WORK WITH IT

Trust, but verify



More trips booked correctly, faster, with less cognitive load on you.

PUTTING IT TOGETHER

Live demo

Switching to the platform — booking a trip, Trip Negotiation, Booking Intelligence.

CLOSING THOUGHT

**You set up the day.
Dispatch runs the day you
gave them.**

See you in Session 2 — Managing the Day of Service.

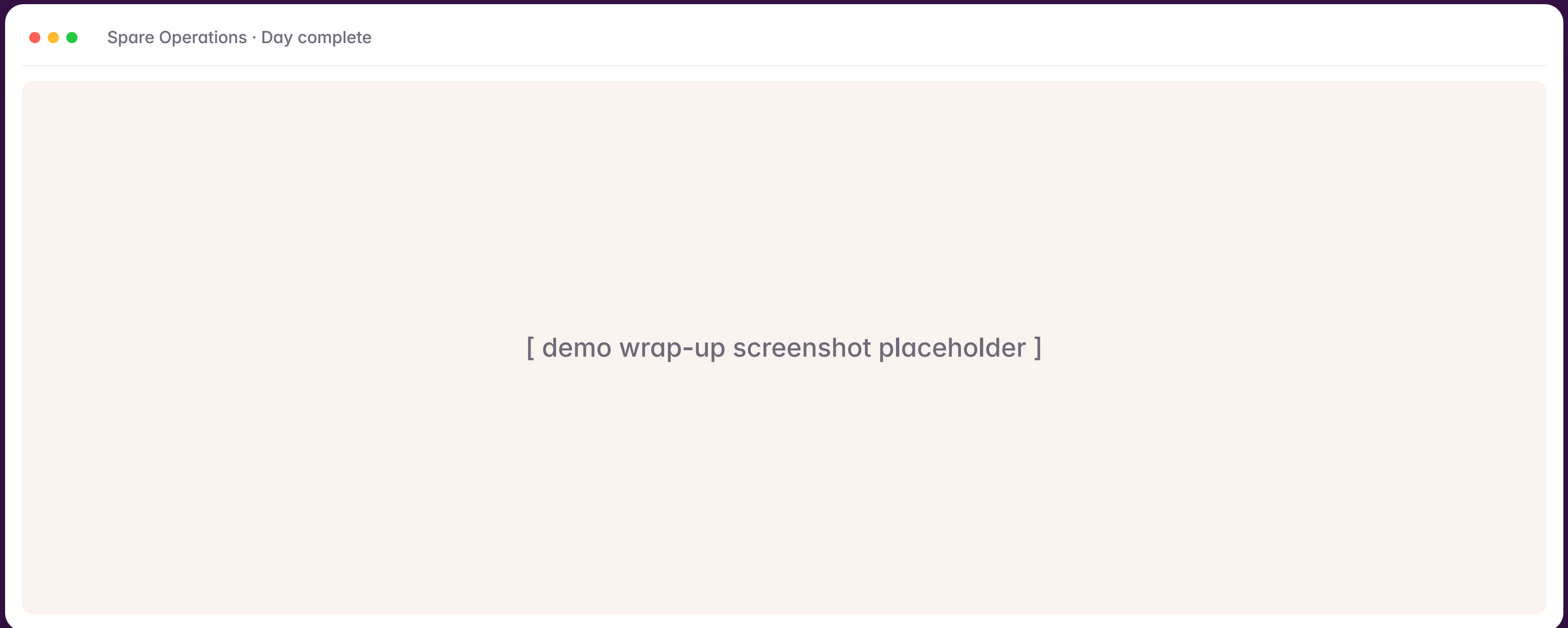
Questions?

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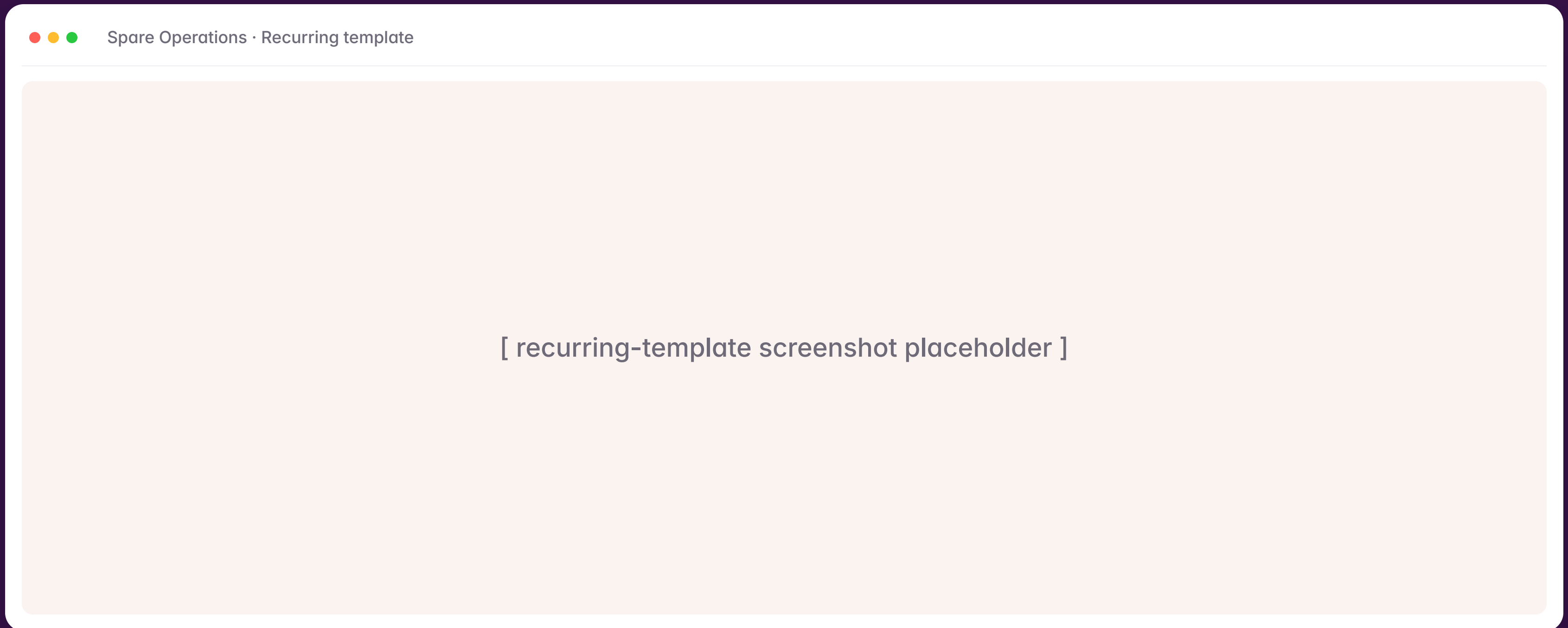
DEMO · WRAP-UP

Putting it together



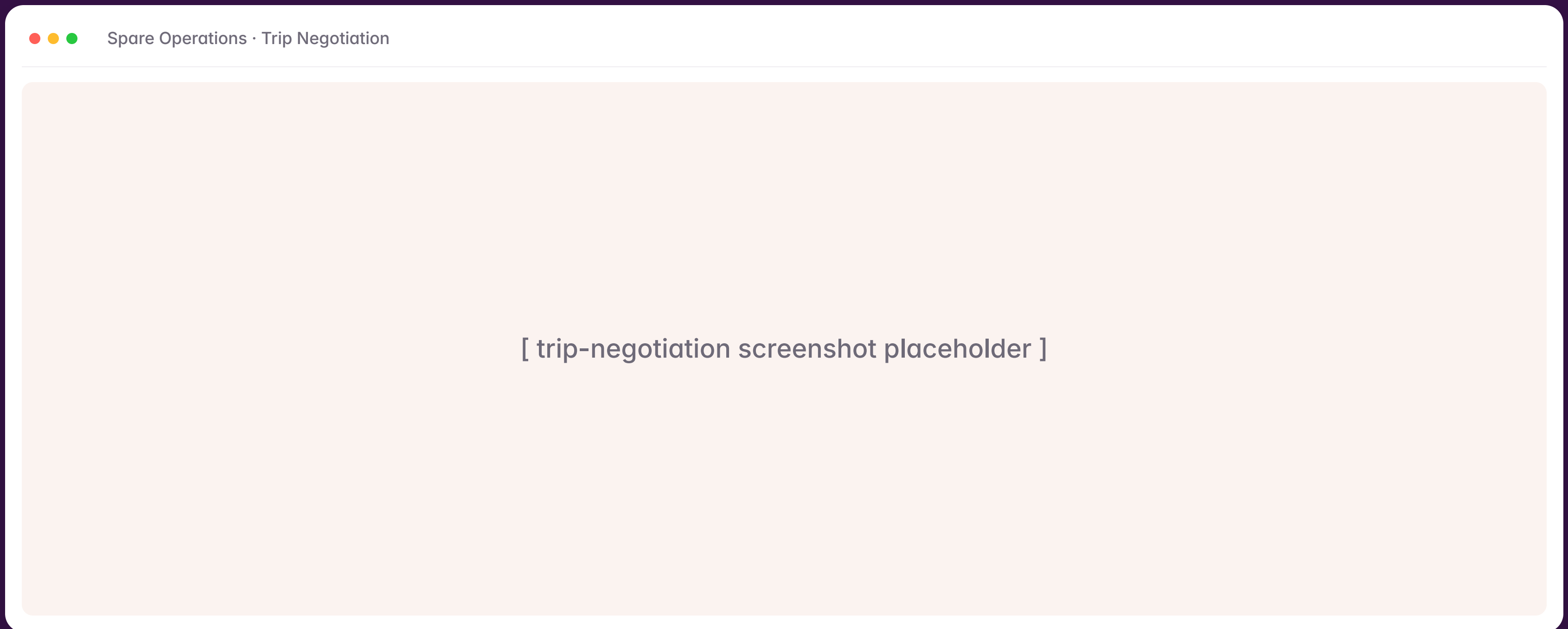
DEMO · STEP 2

Setting up a recurring trip



DEMO · STEP 3

Trip Negotiation in action



DEMO · STEP 4

Booking Intelligence highlights

