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Illustrative examples created for portfolio review in September 2026. These are not PetDesk product instructions or materials previously delivered to an employer.

Sample 1 Job Aid for a New Scheduling Tool

Audience Front desk staff learning a new appointment system

Goal Confirm a client appointment accurately and know when to ask for help

Before you begin

- Confirm the client identity using your organization's approved process.
- Open the scheduling tool and check that you are in the correct location and date.
- Have the service type and preferred time ready.

Confirm an appointment

1. Search for the client record and verify it matches the request.
2. Choose the appointment type. Check its duration and any required resources.
3. Offer an available time and confirm the date, time, and location aloud.
4. Save the booking and check for an on-screen confirmation.
5. Explain the confirmation message or reminder the client should expect.

If something does not match

Do not guess or create a duplicate record. Pause, note what you see, and ask the designated team lead or support contact to verify the next step.

Quick check

Can you locate the correct client, choose the correct appointment type, and confirm that the booking saved? Practice once in a training environment before using a live client record.

Sample 2 Live Training Plan

Topic Confident use of a new appointment system

Audience Front desk staff with mixed levels of software experience

Format 30-minute facilitated session with a training environment

Learning objectives

- Locate the correct client and appointment type.
- Complete and confirm a booking without creating a duplicate.
- Identify when to pause and escalate a mismatch.

Session sequence

- 0–4 min Ask participants what currently causes booking errors. Show the final outcome and where to seek help.
- 4–10 min Demonstrate one booking slowly; explain each decision and show the confirmation screen.
- 10–20 min Participants practice in pairs with two sample scenarios. Provide a printed job aid and invite questions.
- 20–26 min Present a mismatch scenario. Participants explain when they would stop and seek help.
- 26–30 min Each participant completes a booking independently and identifies one remaining question.

Facilitator notes

Use plain language, display each step at readable size, allow learners to practice without live records, and repeat the demonstration for anyone who needs it. Do not assume that speed signals understanding.

Evidence and follow-up

During practice, observe whether each participant completes the three objectives. Collect one-minute feedback about clarity and confidence. After launch, review common booking questions and correction requests with the support team; update the job aid and offer a short refresher if patterns persist.