

NOBODY ANSWERED THE PHONE



J O N S M I T H

FIX MISSED CALLS AND OFFICE OVERLOAD WITHOUT *HIRING*
ANOTHER PERSON



REVOPSFLOW

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The \$8,000 *Voicemail*

Example: The job was worth \$8,000. The customer called during lunch.

A roofing owner came back to the office carrying a sandwich and saw the missed call. No big deal. He would finish eating, check on a delivery, then call back.

The voicemail sounded promising. A homeowner had water coming through the ceiling and wanted someone to look at the roof. The owner knew the neighborhood. Knew the houses. Knew his crew could handle it.

By the time he returned the call, the homeowner had booked the next company.

He stared at the phone. His crew had done good work all morning. His office had lost the opportunity while everybody was eating.

This is an illustrative example. The \$8,000 is an example job value, not a measured loss or a reported result.

That kind of miss gets under your skin because nobody did anything outrageous. Somebody took lunch. Somebody needed an answer. The phone rang between those facts.

You can spend the evening blaming the person who stepped away. You can decide to carry the phone everywhere yourself. You can promise that tomorrow will be different.

Tomorrow brings a supplier problem, a crew question, an invoice correction, and a customer asking where the truck is.

The phone loses again.

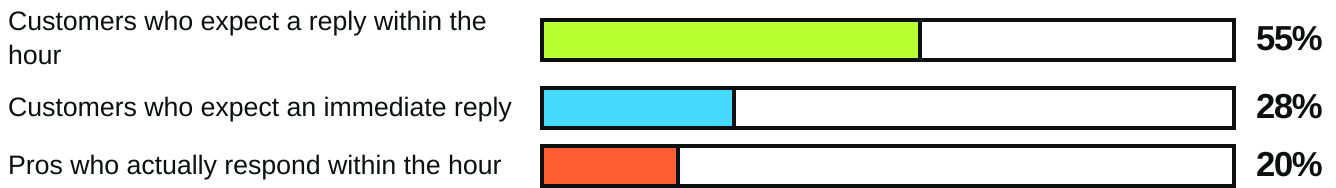
The trouble is bigger than unanswered calls. Your office has become a collection of loose ends that all lead back to you. You approve routine emails. You hunt for appointment details. You remember which estimate needs a follow-up because nobody else knows where that information lives.

You are the owner, dispatcher, reminder system, and emergency search bar.

Good luck taking lunch.

Over 55% of customers expect a reply within an hour. Only 20% of pros respond within that hour (Jobber 2026 Home Service Trends Report). That gap makes response speed worth fixing before you decide the answer is more advertising or another employee.

■ WHAT CUSTOMERS EXPECT VS. WHAT PROS DO



Source: Jobber 2026 Home Service Trends Report

Bars show the reported figures (55% is reported as "over 55%"). The gap between the first bar and the last bar is where jobs go to the next company.

Fast does not mean promising an appointment you cannot deliver. It means somebody takes responsibility for the inquiry, checks the facts, and gives the customer a clear next step. Sometimes that next step is a booked visit. Sometimes it is an honest explanation that you cannot serve them.

Both beat a voicemail nobody owns.

Picture an ordinary workday with a different setup. Lunch has coverage. Missed calls land with a named person. After-hours callers hear when to expect a return call. Appointment reminders go out by email using information your office has already checked.

Your team knows which decisions they can make. You hear about exceptions instead of approving every routine move. When you leave a jobsite, you can look at a short list and see what needs you.

That is the promise of this book: every call answered or returned fast, and hours back in your week. It takes a coverage plan, clear handoffs, and a little discipline. It does not start with hiring another person.

Our team audits profiles, rebuilds sites, and listens to call recordings for home service businesses every week. The recurring problem is ownership: work waits because the next person, next action, or next deadline is unclear.

Here is how we will fix it.

In **Find the Hole**, you will pull call logs and count missed calls by hour and day. You will see where coverage actually breaks.

In **The Call Coverage Plan**, you will assign who answers when, set overflow rules, write the after-hours message, and install a callback rule.

In **AI That Helps, People Who Approve**, you will use AI for call summaries, quote drafts, and email replies while a person approves anything a customer sees.

In **Kill the Busywork**, you will audit a week of office work and automate approved reminders, invoices, review requests, and estimate follow-ups by email.

In **The Office Runs Without You**, you will turn the fixes into simple operating instructions and a short weekly numbers review.

Commit to working through those chapters in order. Keep your call log, calendar, and office task list nearby. You do not need a technology shopping spree. You need to find the next dropped handoff and give it an owner.

Start with the phone that already rang.

01

■ CHAPTER 1

Find the *Hole*

A plumbing owner blamed the office for missing calls. The office blamed the field crew for calling with questions all day.

Everybody had evidence. Nobody had the same evidence.

The owner remembered a frustrated homeowner. The office remembered answering calls while fixing a schedule change. A technician remembered leaving a message that nobody returned.

At the next meeting, the owner opened the phone system's call history. They stopped arguing about who worked hard and started checking when calls arrived, which ones reached a person, and what happened afterward.

Lunch stood out. So did the stretch when the office handled supplier pickups. Some supposed missed leads were repeat calls from the same customer. Some calls marked answered had only reached the greeting.

The office had been defending itself against a vague accusation. Now the team could point to a coverage hole and fix it.

THE LESSON

You cannot cover the hole until you know when it opens and what falls through it.

Why owners get it wrong

Your memory keeps the painful calls. It drops the ordinary ones. That makes it a lousy reporting system.

A phone dashboard can fool you too. Depending on the service, answered may mean a live person picked up, an automated greeting played, or voicemail accepted the call. A label does not prove a customer got help.

Then there is the denominator. Counting every ring as a fresh opportunity mixes new inquiries with supplier calls, existing customers, repeat attempts, and obvious spam. You end up fixing a number that does not describe the work.

Separate the phone event from the customer inquiry. The event tells you whether coverage worked. The inquiry tells you whether someone still needs help. You need both views.

OWNER MISTAKE

Owner Mistake: Calling every missed ring a lost job. Check who called and what happened before assigning a value.

The fix

1 Pull the call logs.

Our rule: start with the last four complete weeks. Export inbound calls from your phone service and gather any separate business mobile logs.

2 Mark the real outcomes.

Identify live answers, voicemail, abandonment, and return attempts. Link repeat calls to the same inquiry.

3 Count by hour and day.

Build a simple spreadsheet heatmap. Put missed calls in the time slot when they arrived, not when you noticed them.

Step 1: Get the raw record

Open the account that manages your business number. Look for Call history, Calls, or Reports. Choose inbound calls and your date range. Export a CSV if available. Otherwise copy the records into a spreadsheet. Menu names vary, so use the provider's help search if the export control is hidden.

Keep the original export unchanged in its own tab. In a working tab, use columns for date, arrival time, caller, business number, system result, live answer confirmed, callback time, inquiry type, outcome, and owner.

Use the same local time zone for every source. Otherwise an exported timestamp can make a lunch problem look like a morning problem.

Include every number you advertise. If the website rings the office and a truck decal rings your mobile, the office report alone leaves out part of the business. Check both without double-counting forwarded calls.

Step 2: Check what the labels mean

Take a few known calls and compare the dashboard with what actually happened. Use an existing voicemail, a call you answered, and a call a customer abandoned. Confirm how your service labels each event.

If you cannot verify a live answer, mark it unknown. Do not turn uncertainty into a success.

Call recordings are not required for this exercise. You can use voicemail, staff notes, calendar entries, and callbacks. If recordings already exist, follow your established recording and access procedures.

RULE

Rule: An answered greeting is not a confirmed conversation. Your audit must distinguish the two.

Use inquiry labels the office can apply without a debate: new inquiry, existing customer, supplier, internal, spam, or unknown. Add an inquiry reference so repeated attempts from the same person stay connected.

A caller who tries again still exposes a coverage failure on the first attempt. Count that missed event in the coverage view. Count the customer once when tracking unresolved inquiries. Neither record should erase the other.

EXAMPLE AUDIT ROWS, ILLUSTRATIVE ONLY

ARRIVAL	SYSTEM RESULT	CHECKED OUTCOME	NEXT ACTION
Monday lunch	Answered	Greeting only	Return call
Monday lunch	Missed	Repeat inquiry	Link to open record
Tuesday morning	Missed	Supplier	Send to purchasing owner

Step 3: Turn the list into a coverage picture

In your spreadsheet, add a Day column and an Hour column. Enter the weekday and arrival hour from each record. Filter for calls that did not reach a live person.

Create a pivot table. Put weekday in Rows, arrival hour in Columns, and count of call records in Values. In Google Sheets, use Insert > Pivot table. Then select the counts and use Format > Conditional formatting > Color scale.

Use a second table for all inbound calls in the same slots. A busy period can have more misses because it has more calls. The raw count identifies workload; comparison with total calls helps you see coverage quality.

■ MISSED-CALL HEATMAP (BLANK TEMPLATE)

	7a	8a	9a	10a	11a	12p	1p	2p	3p	4p	5p	6p+
Mon												
Tue												
Wed												
Thu												
Fri												
Sat												
Sun												

Each call-log row → one tally in its day + hour cell.

Make two copies: **all inbound calls** and **calls with no live answer**.

Shade the darkest cells. That is your coverage hole.

Copy this grid into a spreadsheet. Template only, no data shown.

Beside each troublesome time slot, write what the office was doing: lunch, dispatch changes, invoicing, supply run, or closed. That turns the chart into a staffing decision using the people you already have.

QUICK WIN

Quick Win: Start with the busiest uncovered window. One named backup there can beat a new tool nobody owns.

BEFORE

The owner says the office never answers. The office says the phone never stops.

AFTER

The log shows which arrival windows lack live coverage and which inquiries still need a callback.

FROM BLAME TO A REPAIRABLE GAP

Back to the plumbing office

The owner stopped asking why the office missed everything. He asked who could cover lunch and who should handle supplier interruptions.

The office could answer those questions. They also found open inquiries that needed a return call. No victory speech. Just a shorter list of people waiting.

A missed call needs an owner before it needs an explanation.

- ☐ Export the inbound call records for your chosen period.
- ☐ Gather logs for every advertised business number.
- ☐ Check how your provider defines answered.
- ☐ Separate phone events from unique inquiries.
- ☐ Build the weekday and hour heatmap.
- ☐ Mark the busiest uncovered window.
- ☐ Assign an owner to every unresolved inquiry.

The Call Coverage *Plan*

An HVAC owner had a simple lunch policy: whoever was around answered the phone.

It sounded flexible. The office coordinator thought the owner had it. The owner thought the dispatcher had it. The dispatcher was explaining a parts problem to a technician.

The phone rang beside an empty chair.

After lunch, everyone checked their own work and assumed someone else would return the call. The voicemail waited while the team debated who had been closest to the desk.

The owner wrote names beside coverage windows, added backups, and created a missed-call queue. They stopped making the same ownership decision every time the phone rang.

The following lunch break still had interruptions. It also had someone clearly responsible for answering them.

THE LESSON

Coverage works when the primary person, backup, and callback deadline are decided before the call arrives.

Why owners get it wrong

Everybody answers is a wish. Somebody answers is a plan only after somebody has a name.

Owners often forward unanswered calls to their own mobile and declare the problem solved. Then they climb a ladder, drive to a job, or talk with a customer. The fallback fails under the same pressure as the original line.

Another common mistake is promising instant help after hours when nobody is assigned to provide it. A cheerful voicemail cannot cover an empty shift.

Build around the hours and capacity you can actually support. Give callers an honest expectation. Then meet it.

RULE

Rule: Every coverage window gets a primary person and a backup. Both need access to the calendar and open inquiries.

The fix

1 Assign who answers when.

Put names against opening, lunch, afternoon, and closing coverage. Confirm the handoff before anyone steps away.

2 Set overflow rules.

Configure the phone service to route unanswered calls to the assigned backup. Test the full path from an outside phone.

3 Write the after-hours voicemail.

State business hours, the information you need, and when a person will return the call.

4 Install the callback rule.

Our rule: return missed calls within five minutes during staffed hours. Assign after-hours messages at opening unless you provide staffed on-call coverage.

Step 1: Give the schedule names

Open the shared office calendar. Add coverage entries with the primary person's name, backup person's name, and the number or extension each uses. Include breaks, meetings, and supply runs.

Our rule: spend fifteen minutes building the first schedule. Ask each person to confirm they can actually cover their assigned window. A technician driving between jobs is not dependable live coverage.

The person leaving coverage tells the incoming person about unresolved calls. The incoming person acknowledges the handoff. Until that happens, the outgoing person still owns the queue.

WINDOW	PRIMARY	BACKUP	OPEN INQUIRIES HANDED OVER
Opening	{name}	{name}	{record location}
Lunch	{name}	{name}	{record location}
Afternoon	{name}	{name}	{record location}
Closing	{name}	{name}	{record location}

Step 2: Make the phone follow the plan

In your phone service, find Routing, Call handling, or Business hours. Set the actual staffed schedule. Choose the primary destination and an overflow destination for unanswered calls.

Our starting rule: let the primary ring for fifteen seconds, then send the call to the backup. Adjust after testing. Too much ringing invites abandonment; too little gives the primary no chance to pick up.

If your service offers simultaneous ringing, use it only with a clear primary owner. Otherwise everyone may assume someone else answered.

Check what happens when the backup is busy, declines, or has a personal voicemail enabled. A forwarded call that disappears into somebody's private mailbox is a hidden queue.

OWNER MISTAKE

Owner Mistake: Forwarding calls without testing the final destination. Follow the call all the way to a person or the correct business voicemail.

Call from a phone outside the system. Test an answer, no answer, a busy backup, and the closed-hours path. Write down the result. Fix loops and incorrect greetings before relying on the route.

Step 3: Tell after-hours callers the truth

Use your business voicemail, not a personal greeting. State whether the office is closed and whether anyone is monitoring messages. Do not advertise emergency response unless you actually staff it.

YOU You've reached {business name}. Our office hours are {days and hours}. Please leave your name, callback number, service address, and what you need help with. We return messages beginning {next staffed opening}. This mailbox is not monitored while we are closed.

If staffed on-call service exists, replace the final sentence with the real routing instructions and response commitment.

Read the greeting aloud. Check holiday closures. The message and routing schedule must agree.

At closing, the assigned person checks open inquiries and confirms who owns messages at the next opening. If you have staffed on-call coverage, that person needs the same handoff and access as the daytime team.

Step 4: Own the return call

Create a shared callback list with caller, arrival time, need, assigned person, deadline, attempt time, and result. Use your existing customer system or a shared sheet. Put the list somewhere the answering person already works.

During staffed hours, the coverage owner checks missed-call notifications immediately. If the five-minute rule slips, alert the backup. Do not quietly reset the clock.

When nobody answers your return call, leave a clear voicemail if possible, record the attempt, and schedule the next action. An attempted call and a customer reached are different outcomes.

YOU Hi, this is {name} with {business}. We missed your call about {known need}. Are you still looking for help?

CUSTOMER Yes.

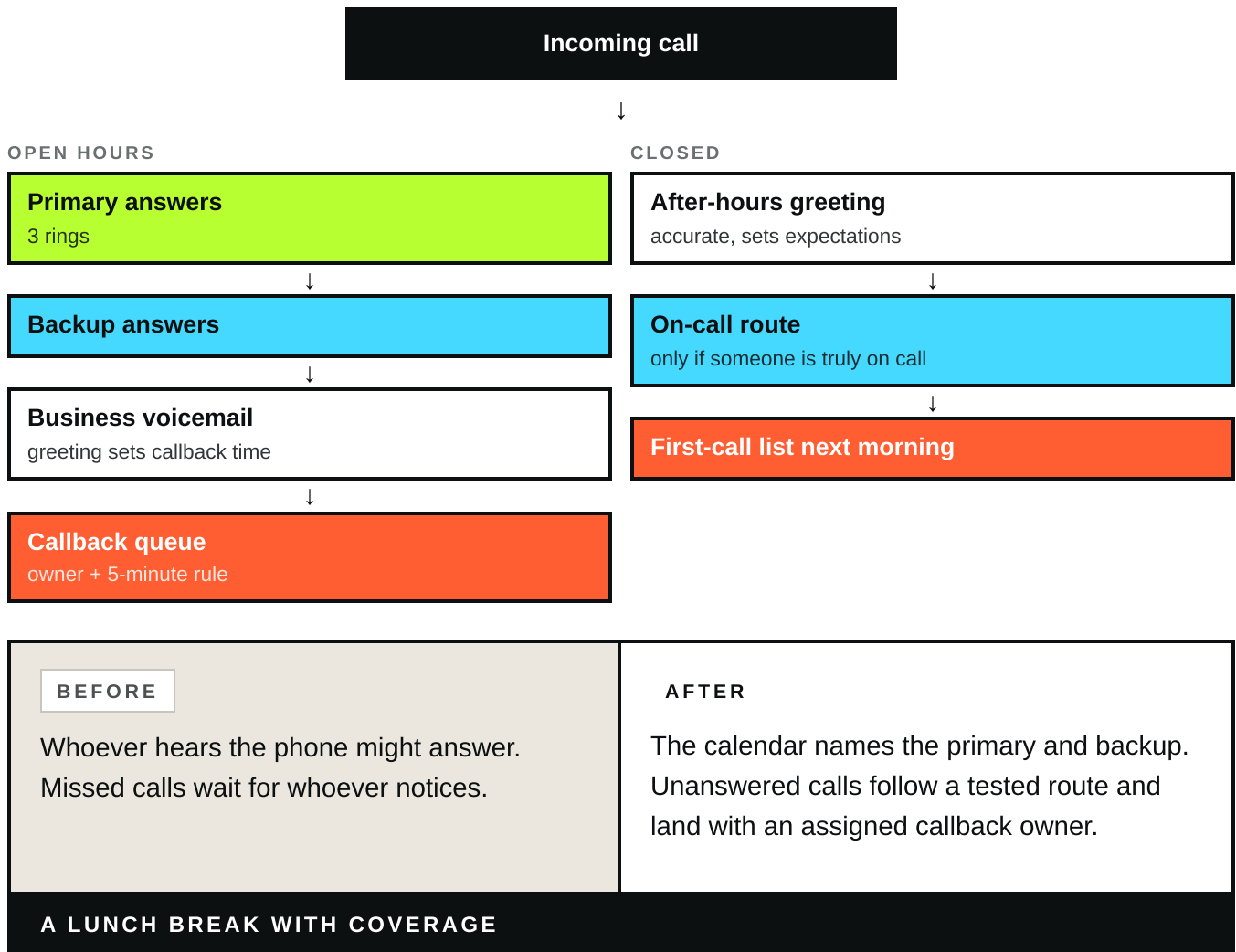
YOU Let me confirm the service address and what is happening. Then I can check the right next step with you.

If leaving voicemail, give your name, business, callback number, and staffed hours.

QUICK WIN

Quick Win: Put the callback deadline beside the caller's name. A visible deadline beats hoping someone remembers.

CALL ROUTING FLOWCHART



Back to the HVAC office

The owner still ate lunch. The dispatcher still handled parts problems. What changed was the handoff.

When the primary stepped away, the backup knew it. When both were tied up, the message appeared in a shared queue with a deadline. The owner could inspect the queue without becoming the queue.

If everyone owns the phone, the customer owns the wait.

✓ DO THIS TODAY

CHECK IT OFF

- ☐ Name the primary and backup for every staffed window.
- ☐ Add coverage and handoffs to the shared calendar.
- ☐ Configure and test the overflow route.
- ☐ Record an accurate after-hours greeting.
- ☐ Put missed calls in one shared callback list.
- ☐ Apply the five-minute rule during staffed hours.
- ☐ Assign responsibility for messages at opening.

Want us to run this for you? See the last page.

AI That Helps, People Who *Approve*

A cleaning business owner tried an automated receptionist because the office could not keep up.

The demonstration sounded polished. The real caller wanted to know whether the crew could enter through a side gate and avoid a freshly painted room. The system repeated its booking question.

The caller asked for a person. The system repeated itself again.

Later, the owner tried a smaller use for AI. She gave it an anonymized set of call notes and asked for a summary. It pulled out the access question, the room restriction, and the missing appointment confirmation.

Her coordinator checked the summary against the notes, corrected a detail, and called the customer.

The useful part was the prep work. The coordinator still made the decision and handled the conversation. The owner kept that arrangement and stopped asking the software to impersonate a fully informed employee.

THE LESSON

Use AI to prepare the work, and keep a person responsible for facts, decisions, and customer-facing approval.

Why owners get it wrong

A confident sentence can hide a bad assumption. AI can turn missing information into a polished answer that sounds settled.

That is dangerous when the missing detail is a service address, a price, an access instruction, or an appointment. Your customer does not care whether software invented the promise. Your business made it.

The opposite mistake is refusing useful help because a robot receptionist annoyed somebody. Call summaries, quote drafts, and email drafts are separate tasks. You can use them without handing over the customer conversation.

Among pros who use AI, 54% use it for quoting, 52% for invoicing, and 51% for business writing (Jobber 2026 Home Service Trends Report). Those are reported uses, not proof that any output is ready to send.

OWNER MISTAKE

Owner Mistake: Making callers fight a robot to reach a person. Give the customer a clear route to your team.

The fix

1 Prepare call summaries.

Use approved call notes or transcripts. Ask AI to extract facts, unanswered questions, and the next action without filling gaps.

2 Prepare quote drafts.

Supply the approved scope and price inputs. Require missing information to remain visibly unresolved.

3 Prepare email replies.

Supply the customer's question and confirmed facts. Save the output as a draft for a person to review.

4 Require human approval.

Disable automatic sending for AI output. Assign a reviewer who checks the source, corrects the draft, and approves anything a customer sees.

Step 1: Turn notes into a usable handoff

Start with an AI tool your business has approved for the information involved. Check its data controls before adding customer records. Use anonymized notes for your first test and remove payment details or unrelated personal information.

Typed notes work without introducing call recording. If your business already uses transcripts, follow its established recording and access procedures.

Our rule: allow fifteen minutes to test the summary prompt against a completed inquiry. You already know the correct outcome, so errors are easier to spot.

YOU Summarize the supplied notes under Customer need, Confirmed facts, Unanswered questions, Promises actually made, and Next action. Use only the notes. Write unknown when information is missing. Do not infer an appointment, price, or diagnosis. Notes: {approved notes}.

A person compares the summary with the original before saving it to the customer record.

Step 2: Draft from scope you already approved

Create a quote template with service description, included work, exclusions, approved price, scheduling conditions, and next step. Have the estimator supply those inputs. AI can organize the language; it cannot inspect a roof or decide what the customer needs.

Use this instruction: "Draft from these approved inputs only. Preserve supplied prices exactly. Mark missing details NEEDS REVIEW. Do not add materials, warranties, discounts, or completion promises."

Keep unresolved drafts out of the sending queue. The reviewer checks line items and totals against the estimating system. If scope needs a site visit, say so rather than manufacturing certainty.

RULE

Rule: AI may draft a promise. Only an authorized person may approve it. Check scope, price, timing, and customer details.

Step 3: Make email replies short and useful

Create a saved prompt for common office replies: "Answer the question below using only the confirmed facts. Keep it plain. Ask for missing information. Do not promise availability or attach a price unless supplied."

Paste the result into a draft email. Check the recipient and the actual customer question. Answering the wrong question wastes time.

Subject: Your appointment request for {service address}

Hi {first name}, We received your request for {service}. Your appointment is not confirmed yet. Please reply with {missing information}, or call us at {business phone} during {staffed hours}. We can then check availability with you. {staff name}

Step 4: Build the approval gate

In your email or customer system, look for automation actions named Send, Auto-reply, or Publish. For AI-generated content, use Create draft or Create task instead. If the tool cannot hold output for review, keep it outside the sending workflow.

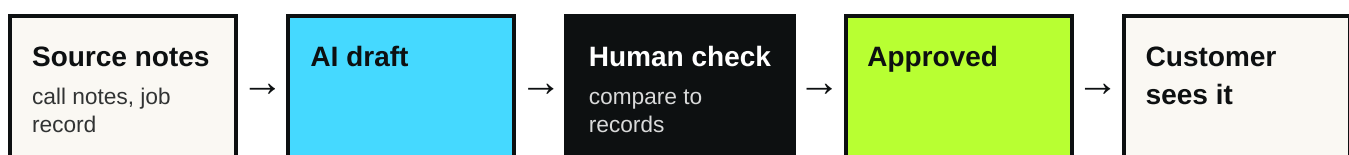
Assign a reviewer and backup. Record approval in the customer record with the approver's name and date. After edits, review the final version, not the earlier draft.

BEFORE APPROVING AI OUTPUT**CHECKLIST**

- ☐ Recipient and customer record match.
- ☐ Facts match the source notes.
- ☐ Scope and price match approved inputs.
- ☐ Schedule claims match the live calendar.
- ☐ Unknowns stay unresolved until checked.
- ☐ Final message has an authorized human approver.

QUICK WIN

Quick Win: Save a good prompt beside the template it supports. Your office should not rewrite instructions for every draft.

AI DRAFTS. A PERSON APPROVES.

↑ wrong or unclear? correct and re-check. Nothing unapproved goes out.

BEFORE An automated voice repeats questions while a caller waits for help.	AFTER AI prepares notes and drafts. A person checks the facts, approves customer-facing content, and handles the conversation.
AI WITH A USEFUL JOB	

Back to the cleaning business

The coordinator used the checked summary to confirm access and room restrictions. The customer got a person who knew what needed answering.

The owner kept the useful drafting assistance. When a draft invented certainty, it stayed a draft until someone fixed it.

Fast wrong answers just create faster cleanup.

✓ DO THIS TODAY	CHECK IT OFF
☐ Choose an approved tool for a small drafting test.	
☐ Test a summary using anonymized notes.	
☐ Build a quote prompt from approved scope and prices.	
☐ Save an email reply prompt with clear limits.	
☐ Disable automatic sending for AI output.	
☐ Name the reviewer and backup.	
☐ Record approval before anything reaches a customer.	

Want us to run this for you? See the last page.

04

■ CHAPTER 4

Kill the *Busywork*

A landscaping owner wanted the office to answer faster. His coordinator wanted him to stop handing her the same work twice.

She confirmed appointments from the calendar, copied the details into emails, looked up unpaid invoices, and checked which estimates needed another message. When a customer rescheduled, she had to remember every place the old appointment still lived.

He called it admin. She called it the reason she missed calls.

They tracked a normal week. The list showed repeated copying, checking, and chasing. It also showed where automation would be a bad idea: disputed invoices, uncertain scopes, and appointment changes nobody had confirmed.

They started with one approved appointment email and a clear cancellation condition. Once that worked, they added the next routine task. The office handled exceptions without rebuilding routine messages.

THE LESSON

Remove repeated handling from routine work so your team has time for calls and exceptions.

Why owners get it wrong

You can buy automation and still have a mess. Now the mess sends email while you sleep.

The usual failure is starting with the message instead of the event. A reminder needs a confirmed appointment. An invoice needs approved billing details. A review request needs a real completed service. A follow-up needs an estimate that is still open.

If your records do not show those facts reliably, fix the records first. Otherwise the office spends its saved time explaining why the customer received the wrong message.

OWNER MISTAKE

Owner Mistake: Automating an unclear process. Write the trigger, approval, stop condition, and owner before switching it on.

The fix

1 Audit one week.

Log repeated office tasks, active minutes, interruptions, and the record each task depends on.

2 Automate reminders by email.

Trigger from confirmed appointments and update or cancel messages when the schedule changes.

3 Automate approved invoices by email.

Send only after the responsible person checks completion, charges, and recipient.

4 Automate review requests by email.

Ask customers consistently after completed work, using a neutral approved template.

5 Automate estimate follow-ups by email.

Send only while the estimate is open. Stop when the customer replies, accepts, declines, or asks you to stop.

Step 1: Find work worth removing

Keep a shared sheet open for a normal workweek. Use columns for task, trigger, active minutes, source record, repeat entry, exception, and owner. Record time as you work rather than reconstructing the week on Friday.

Our rule: use rough minutes, not stopwatch theater. You need to distinguish repeated handling from occasional complicated work.

At week's end, total the active minutes by task. Start with a frequent, predictable task whose source record is trustworthy. Save your observed baseline so you can compare actual handling time after the change.

TASK	TRIGGER	HUMAN CHECK	STOP OR EXCEPTION
Reminder	Confirmed appointment	Details approved	Cancelled or moved
Invoice	Billing approved	Scope and charges	Dispute or correction
Review ask	Completed service	Completion verified	Already asked or opted out
Estimate follow-up	Estimate sent	Estimate approved	Reply or status change

Step 2: Send reminders from the calendar

In your scheduling tool, look for Notifications, Reminders, or Automations. Choose email and the appointment-confirmed event. Our starting rule: send the reminder the day before the visit, using the latest approved appointment details.

Use the confirmed arrival window, service address, and preparation instructions. Do not convert an arrival window into an exact arrival promise.

APPOINTMENT REMINDER	EMAIL TEMPLATE
Subject: Your {business name} visit on {appointment date} Hi {first name}, Your confirmed visit is scheduled for {arrival window} at {service address}. Please {approved preparation instruction}. Need to change something? Reply here or call {business phone} during {staffed hours}. {staff name}	

Test a reschedule and a cancellation using an internal test record. Confirm the old reminder disappears and the current details appear. If your tool cannot cancel queued emails, use a reviewed sending queue instead.

Step 3: Put approval before invoice delivery

In your billing system, identify the difference between Draft, Approved, Sent, and Paid. Names vary. Your sending trigger should require an approved invoice, not merely a completed appointment.

Check completed work, approved additions, credits, recipient, and payment instructions. Keep card and bank details out of ordinary email. Use your existing approved payment process.

Our rule: test the workflow with an internal recipient before enabling customer sends. If the system cannot separate preparation from approval, have it create a task for the billing owner.

Hold disputed invoices for review. Stop collection reminders when the record shows payment or an active dispute. Do not make the customer argue with an automation.

RULE

Rule: A status change must stop an outdated message. Test the stop condition as carefully as the send button.

Step 4: Ask for reviews consistently

Use the completed-service status, a verified customer email, and an approved review link. Ask all eligible customers consistently. Do not send only to people who first tell you they are happy. Do not offer payment, a discount, or a prize.

Use [Google's review-request guidance](#) and [Google's prohibited-content policy](#) when setting up the request.

HONEST REVIEW REQUEST

EMAIL TEMPLATE

Subject: How was your service from {business name} ?

Hi {first name} , Thank you for choosing us for {completed service} . Please share an honest review here: {your Google review link} . If you need help with the work, reply to this email or call {business phone} . Thank you, {staff name}

Step 5: Follow up without chasing ghosts

Use the estimate-sent date and current estimate status. Our starting rule: schedule follow-ups for the next business day and one week after sending. Adjust to the customer's stated timing.

Write an approved template asking whether the customer has questions about the supplied scope. Keep discounts and new promises out of automatic messages.

Any reply pauses the sequence and creates an owned response task. Acceptance, decline, expiry, or an opt-out stops it. Make sure somebody monitors replies; a reply address that nobody reads defeats the whole point.

QUICK WIN

Quick Win: Build and test one workflow before adding another. Keep a manual fallback until the live record and sending log agree.

 AUTOMATION MAP: RECORDS TRIGGER EMAILS

RECORD	EMAIL WORKFLOW	HUMAN STEP	STOPS WHEN
Appointment booked	Confirmation + reminder	Template approved once	Cancelled or rescheduled
Invoice approved	Invoice + payment reminder	Office approves invoice	Paid
Job completed	Thank-you + review request	Tech marks complete	Customer replies or complains
Estimate open	Day 3 and 14 follow-up	Estimator approves	Reply or status change

BEFORE The coordinator rebuilds routine emails and remembers every exception.	AFTER Approved records trigger approved emails. Changes stop outdated messages, and exceptions go to a named person.
AN OFFICE WITH LESS COPYING	

Back to the landscaping office

The coordinator could see which routine messages had been sent and which exceptions needed her. Rescheduling no longer depended on remembering every old email.

The owner compared handling time with the audit instead of guessing how much time the software saved. More of the coordinator's attention could go to the person calling now.

Busywork is expensive because it steals the attention customers need.

✓ DO THIS TODAY

CHECK IT OFF

- ☐ Start the one-week time audit.
- ☐ Pick a repeated task with a trustworthy source record.
- ☐ Write its trigger, approval, stop condition, and owner.
- ☐ Build an approved email template.
- ☐ Test both a send and a stop with internal records.
- ☐ Assign replies and exceptions to a person.
- ☐ Compare actual handling time after the change.

Want us to run this for you? See the last page.

The Office Runs Without *You*

A pest control owner tried leaving his phone in the truck during a customer visit.

When he returned, the office had questions waiting. Could they move an appointment? Who should return a missed call? Was an estimate ready to send?

None of the questions was unusual. That was the problem. His team had handled versions of them before, but the answers lived in his head.

He started writing instructions for the work that interrupted him most. The coordinator followed the first set and immediately found a gap: the instructions said to check availability but never said where the approved schedule lived.

They fixed the document together.

On his next visit, the coordinator handled a routine change using the instructions. An unusual service request still reached him, with the relevant details attached. He could make the decision without reconstructing the entire conversation.

THE LESSON

The office can run routine work without you when decisions, instructions, and exceptions are clear.

Why owners get it wrong

Telling someone once is not a process. Neither is a folder full of instructions nobody can find while the phone rings.

Owners also confuse delegation with unlimited permission. A coordinator can own callbacks without approving a complicated scope change. An estimator can approve a quote without controlling the schedule.

Your team needs to know both what they own and where their authority ends. Otherwise careful people ask you everything, while confident people make promises you never approved.

Write instructions for work that repeats. Reserve your attention for decisions that require your judgment. Then inspect whether the arrangement works.

RULE

Rule: Every routine task needs an owner, an instruction, and a finish line. An exception needs a destination too.

The fix

1 Write simple SOPs.

Start with missed calls, appointment changes, and approved email workflows. State the trigger, owner, actions, completion record, and exception route.

2 Test and assign them.

Have the person doing the work follow the instructions without your narration. Fix gaps and name a backup.

3 Review the numbers weekly.

Our rule: hold a fifteen-minute review of coverage, callbacks, office workload, and exceptions. Choose one correction and assign its owner.

Step 1: Write instructions someone can use mid-call

An SOP is a standard operating procedure. Keep yours plain enough to follow with a customer waiting. Open a shared document and title it with the action: "Return a missed call" beats "Office excellence."

Our rule: draft each routine procedure in twenty minutes. Use the actual screen names in your tools. Replace "update the system" with the record and field the employee must change.

- ☐ Task: {plain-language action}.
- ☐ Trigger: {event that starts the task}.
- ☐ Primary and backup: {names or assigned roles}.
- ☐ Source: {record, calendar, or queue location}.
- ☐ Actions: {specific clicks, checks, and words}.
- ☐ Done: {evidence saved and next action assigned}.
- ☐ Exception: {condition and person to contact}.
- ☐ Maintainer: {owner and last review date}.

For callbacks, name the shared queue, the staffed-hours deadline, the opening responsibility, and the fields needed after an attempt. For appointment changes, name the calendar, permitted changes, and how reminder emails update.

For AI drafts, carry forward the human approval requirement. For automated emails, record where to pause the workflow and who handles failed sends or replies. The procedure should preserve the safeguards you already built.

Put these documents in one shared folder. Pin its index in the office workspace or browser bookmarks. Give staff the access they need before a busy shift exposes a permissions problem.

Step 2: Let the user find the holes

Ask the primary person to perform a routine task from the document. Stay quiet. Every question they need to ask reveals something the instructions assumed.

Update the procedure immediately. Then let the backup try it. A document that works only for its author is unfinished.

Write decision limits into the instructions. Staff can confirm appointments inside approved availability. They escalate requests outside it. They can send an approved estimate, but they cannot invent scope or change prices without authority.

OWNER MISTAKE

Owner Mistake: Asking people to own results while withholding decision limits. Tell them what they may decide and what they must escalate.

For exceptions, require a compact handoff: customer need, confirmed facts, decision required, and next deadline. You should not have to search several inboxes before answering a question.

ESCALATION HANDOFF

SCRIPT

YOU {Customer} needs {request}. I checked {source}. Our procedure allows {boundary}, but this request involves {exception}. I need your decision on {specific choice} by {deadline}. The current record is {location}.

The task owner remains responsible for telling the customer what happens next.

Step 3: Keep the weekly review short

Put a recurring fifteen-minute meeting on the calendar. The coverage owner brings the call log. The office owner brings the exception list and automation failures. Review records, not recollections.

Track calls without a live answer, missed calls returned within your staffed-hours rule, inquiries still unresolved, and oldest outstanding callback. Keep attempts separate from conversations. Add office handling time from your audit and any failed or incorrectly sent emails.

OUR FIFTEEN-MINUTE REVIEW AGENDA

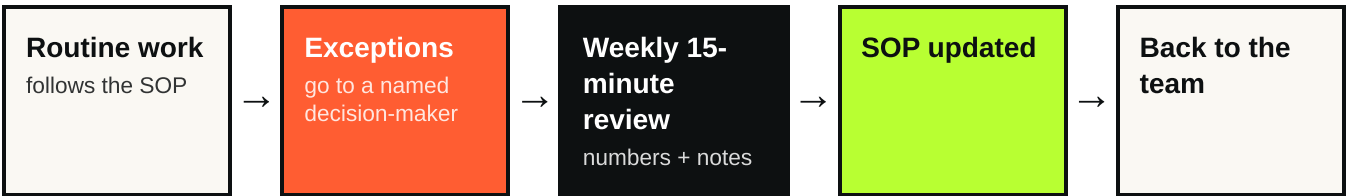
TIME ALLOWANCE	DECISION
Five minutes	Where did coverage or callbacks fail?
Five minutes	Which repeated task or exception consumed attention?
Five minutes	What changes, who owns it, and when is it checked?

Choose one correction you can complete before the next review. Give it a name and due date. At the following meeting, check whether it happened and whether the relevant records improved.

QUICK WIN

Quick Win: Use interruptions to choose the next SOP. Repeated questions show where the instructions are missing.

THE OFFICE OPERATING LOOP



BEFORE Ordinary decisions wait for the owner's phone to become available.	AFTER Staff handle routine work inside written limits. Exceptions reach the owner with facts and a specific decision request.
THE OWNER LEAVES THE DESK	

Back to the pest control office

The owner still answered unusual questions. He no longer had to re-explain every routine appointment change.

When the coordinator found a gap, they corrected the instructions. The office became less dependent on his memory because the team kept improving the place where answers lived.

Your memory should not be the office's operating system.

✓ DO THIS TODAY	CHECK IT OFF
☐ Write the missed-call procedure.	
☐ Add appointment-change and email-workflow instructions.	
☐ Put the documents in one accessible location.	
☐ Name a primary and backup for each task.	
☐ Test instructions without coaching.	
☐ Write decision limits and escalation rules.	
☐ Schedule the weekly fifteen-minute review.	

Office Overload *Scorecard*

Answer yes only when the process works in practice. Our scoring rule: each yes earns one point; each no earns zero. The maximum is fifteen points. This is a working checklist, not a research benchmark.

OFFICE OVERLOAD SCORECARD

Find the Hole

- | | |
|--|------|
| ☐ Can you pull records for every advertised business number? | 1 pt |
| ☐ Do you distinguish live answers from greetings and voicemail? | 1 pt |
| ☐ Can you identify missed calls by hour and day? | 1 pt |

The Call Coverage Plan

- | | |
|---|------|
| ☐ Does every staffed window have a primary and backup? | 1 pt |
| ☐ Have you tested overflow and after-hours routing? | 1 pt |
| ☐ Does every missed inquiry have an owner and callback deadline? | 1 pt |

AI That Helps, People Who Approve

- | | |
|--|------|
| ☐ Do summaries preserve unknowns instead of guessing? | 1 pt |
| ☐ Do quote and email drafts use confirmed inputs? | 1 pt |
| ☐ Does a human approve anything customer-facing? | 1 pt |

Kill the Busywork

- | | |
|---|------|
| ☐ Have you measured a week of office tasks? | 1 pt |
| ☐ Do email workflows require approved source records? | 1 pt |
| ☐ Have you tested stop conditions and assigned exceptions? | 1 pt |

The Office Runs Without You

- | | |
|--|------|
| ☐ Can staff find and follow routine SOPs? | 1 pt |
| ☐ Are decision limits and backups written down? | 1 pt |
| ☐ Does the weekly review produce an owned correction? | 1 pt |

Your score: _____ / 15

THIS WEEK

CHECKLIST

- ☐ Pull the logs and mark the coverage holes.
- ☐ Assign coverage and test the complete call route.
- ☐ Start the staffed-hours callback rule.
- ☐ Test AI drafts behind human approval.
- ☐ Track office tasks for the week.
- ☐ Test an approved email workflow and its stop condition.
- ☐ Write and test the first routine SOP.
- ☐ Hold the review and assign the next correction.

Keep the logs, coverage sheet, procedures, and review notes together. Use them when work gets busy. That is when the office needs a system most.

Links in this book

Google's review-request guidance

<https://support.google.com/business/answer/3474122>

Google's prohibited-content policy

<https://support.google.com/contributionpolicy/answer/7400114>

Links checked Oct 2026; verify before use. Statistics are quoted from the named sources; stories are anonymized composites, and anything marked "example" is illustrative.

■ THE NEXT STEP

Want this done *with you?*

RevOpsFlow is a marketing team for small businesses, based in Atlanta and working with home service companies everywhere. We build and run the systems in this book: call coverage and dedicated call reps, AI agents trained on your SOPs with a person approving anything customer-facing, and email automation for reminders and follow-up. One connected team, one plan, fewer handoffs between the click and the customer.

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Book a free 20-minute Lead Leak Review.

If you'd rather have someone do this with you, book a free 20-minute Lead Leak Review. We'll look at your call logs, your after-hours setup, and where your office hours go and show you where calls and hours are slipping. If we're not a fit, you still leave with the list.

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