



Missed-Call Recovery Checklist

Every call that rings out while you're on a job, on a roof or driving can be a job that goes to the next company on the list. Work through this page to **find out how many calls you're missing, win more of them back, and stop the leak.** Most of it costs nothing but a habit.

37% / 32% of test calls to HVAC / plumbing businesses were answered by a live person.

Lobby, 2026 test of 16,051 U.S. & Canadian service businesses

82% of consumers say they'd call a competitor if you don't answer. Only **42%** say they leave a voicemail.

CallRail, 2025 survey of 1,000 U.S. consumers

1 Measure your missed calls

- ☐ Pull the **last 30 days** from your carrier report or business phone app
- ☐ Count calls that rang out or went to voicemail (skip obvious spam), then divide by 4 for a weekly number
- ☐ Note your **worst hours**: lunch, late afternoon and Saturdays are common weak spots
- ☐ Put a dollar figure on it:
Missed calls/wk _____ × share that books _____%
× avg job \$_____ × 52 = \$_____ a year

2 Set a call-back rule

- ☐ Every missed call gets a **call or text back within 15 minutes**, between jobs
- ☐ Name **one person each day** who owns call-backs
- ☐ Return urgent calls first (no heat, no cooling, active leak)

3 Use a simple call-back script

- ☐ Keep it short, and **always offer a time**:

"Hi, this is [Name] with [Company]. Sorry I missed your call, I was on a job. What's going on? ... I can have someone out [day/time]. Does that work?"

- ☐ Get name, phone, address and the problem before you hang up

4 Turn on automatic text-back

- ☐ Check if your phone system or field service software can text missed callers right away
- ☐ Say who you are and when you'll call: "Sorry we missed you. [Company] will call you back within 15 minutes."

5 Fix your voicemail greeting

- ☐ Say your **business name, when you'll call back, and how to reach you for an emergency**
- ☐ Ask callers to leave their name, number, address and the problem

6 Cover after-hours & overflow

- ☐ Decide who answers when you can't: nights, weekends and busy hours
- ☐ Compare your options against your dollar figure from step 1: on-call phone rotation · live answering service · AI receptionist · AI answering built into your field service software · a done-for-you office team
- ☐ Test any service yourself with a **hard call**, like an upset customer with no hot water

7 Log every lead

- ☐ Every caller goes in one place: your software, CRM or a shared sheet
- ☐ Record **name, phone, address, problem, how they found you, booked yes/no**
- ☐ No sticky notes or "I'll remember it"

8 Ask to book, then follow up

- ☐ On every answered call, **ask to book** and offer a specific time
- ☐ Follow up on every open estimate on a set schedule, for example 2 days, 1 week and 2 weeks after sending
- ☐ Mark each estimate won, lost or still open, and note why you lost it

9 Hold a 15-minute weekly review

- ☐ Missed calls this week (and at what hours)
- ☐ How fast missed calls got a call-back
- ☐ New leads, and how many booked
- ☐ Open estimates and who's following up
- ☐ One thing to fix next week

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