PLAYBOOKS

DISPATCH BEST PRACTICES

The dispatcher decides how much the day earns and how the customer feels about it.

BUILD THE DAY BEFORE IT STARTS

- Confirm tomorrow by mid-afternoon today.
- Group jobs by zone, then assign by skill.
- Hold a little capacity for emergencies, and more during the season.
- Put your best closers on sales opportunities, and your most patient techs on repeat problems.

RUN THE DAY

- First calls leave on time. A late first call makes every other call late.
- Update customers when anything moves, before they have to ask.
- Check the board every hour against what actually happened.
- When a job runs long, decide right then what moves and who calls.

PROTECT YOUR DISPATCHER

A dispatcher who is also the receptionist will miss calls and make worse decisions. Separate those jobs at peak hours, or get backup. See the dispatcher burnout guide.

NUMBERS TO WATCH

- On-time arrivals
- Booked capacity versus real capacity
- Drive time per job

- Same-day cancellations and no-shows
- Callbacks

WHAT GREAT DISPATCHERS DO DIFFERENTLY

They think ahead. A good dispatcher looks at the next three hours, not just the current call. They notice that a job in the north end is running long, and that the next call is at risk, before the customer phones to ask.

They also protect the promises the company has made. A dispatcher's real product is a kept promise to a customer.

SET ARRIVAL WINDOWS YOU CAN HIT

Narrow windows please customers but can be hard to hit. Wide windows are easier to keep, but they frustrate people. Many shops use two- or four-hour windows and add on-the-way texts. Look at your on-time data, and set your windows from what you actually achieve. Consider giving the first call of the day a firm time. It's the one you have the most control over.

BUILD THE BOARD IN LAYERS

1. Start with fixed commitments: installs, permits, inspections and plan visits.
2. Add the jobs that need specific skills.
3. Fill in by zone, to cut drive time.
4. Hold room for emergencies, based on season and history.
5. Check that each tech's day is realistic, including lunch.

USE A SIMPLE JOB-SIZE GUIDE

Not all calls take the same time. Assign rough durations by job type, based on your own records. Update them every few months. When your board assumes that every call takes an hour, you'll be behind by 10:30.

COMMUNICATE WITH THE FIELD

Agree on a few rules. Techs should update job status in the app without being asked. They should call the dispatcher before going over the estimated time by more than 15 or 20 minutes. Keep routine communication in the app, and save phone calls for what actually needs a conversation. Dispatchers can return the favor by giving techs what they need before they arrive: notes, history, gate codes and any customer concerns.

HANDLE THE BAD DAYS

When the day falls apart, triage quickly:

- Which customers have safety issues?
- Which appointments can be moved with the least harm?
- Who needs a phone call right now?
- Which jobs can another tech take?

Call the affected customers first. Don't wait for them to call you. An early, honest call often earns more trust than a perfectly run day.

PROTECT MARGIN WHILE DISPATCHING

Dispatch decisions affect revenue. Send your strongest salespeople to replacement opportunities. Don't send a tech across town for a small job when another is five minutes away. Be careful about stuffing too many jobs into a day, as rushed techs skip inspections and produce callbacks.

MAKE IT A TEAM SPORT

Hold a five-minute morning huddle between dispatch and the field. Review the day's hard jobs and changes. Once a week, compare what was planned with what actually happened. Thank your dispatcher in front of the techs, because their work is mostly invisible when it goes right.

TRAIN A BACKUP

Every dispatcher needs a trained backup who practices regularly. Pick someone who already understands the service area. Have them run the board one day a month, with help nearby. When the regular dispatcher is sick or on vacation, the business shouldn't feel it.

Sources: Service ProCall program guidance.

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BEST PRACTICES: AN OVERWHELMED DISPATCHER

MAKE IT A HABIT

What good looks like

> Phones and the board are not the same person's job in busy hours.

> The next day's board is built the afternoon before.

> Customers hear about changes before they ask.

The habits

1. Separate answering from dispatching during peak hours.
2. Build tomorrow's board by 3 PM, grouped by area.
3. Match job types to tech skills before the day starts.
4. Text customers about delays before they call.
5. Keep a short list of who to call when a tech runs long.
6. Debrief the day for 10 minutes: what slipped and why.

Signs it's time to get help

- Your dispatcher is putting callers on hold to move jobs.
- Customers call to ask where the tech is.
- Your dispatcher works through lunch most days.

Where we fit: Service ProCall takes overflow calls so your dispatcher can run the board, and ProCall Field helps with the board itself.

More on an overwhelmed dispatcher