OPERATIONS

BUILD A HEAT WAVE AND FREEZE PLAN BEFORE YOU NEED IT

At peak, calls can double or triple in an hour.

The first heat wave or hard freeze sends every homeowner to the phone at once, and your dispatcher is still one person with one headset.

WRITE IT DOWN NOW

- Who gets pulled onto phones, and in what order
- Which jobs come first: no heat with infants or elderly occupants, active leaks, then the rest
- What you tell callers about wait times
- Which calls overflow, and to whom
- How callbacks get tracked so nobody is lost

Run through it once with your team before the season starts.

WHY THE PLAN HAS TO BE WRITTEN

In a surge, nobody has time to think. Your dispatcher is overwhelmed, your techs are running behind and the phone won't stop. People fall back on habit, and habit usually means first come, first served, with everyone being promised today. Written rules let your people make good decisions while under stress.

KNOW YOUR TRIGGERS

Pick clear signals that activate the plan, based on your own history:

- A forecast above or below a set temperature

- The first hot or cold spell of the season, even if it's mild
- A major storm or a local freeze warning
- Calls per hour above a set number

Assign one person the job of watching the forecast and making the call a few days ahead.

SET YOUR PRIORITY RULES

Agree on these before the season, because this is when fairness gets tested:

1. Immediate safety issues, like gas, sparking and active flooding
2. No heat or no cooling where someone is elderly, an infant or medically at risk
3. Active leaks that are causing damage
4. Existing plan members, if that's what you promise
5. Everyone else, in the order received

Teach your office how to ask about vulnerable occupants, and to write the answer down.

CLEAR THE SCHEDULE

Decide what moves. Routine tune-ups, estimates and non-urgent work can usually shift. Call those customers early, apologize and give them a firm new time. Plan members deserve a call, not a surprise.

STAFF UP THE PHONES

List who answers, in order: office staff, sales staff, owners, even a family member who can take messages. Then say who overflows to whom, whether that's a backup service or a call center. Pre-write the recording that callers hear: "We're receiving a high volume of calls because of the weather. Stay on the line, or leave a message and we'll call you back today."

Give your extra helpers a one-page cheat sheet with what to ask, what to promise, and what to avoid.

STRETCH THE FIELD

- Pull helpers and apprentices into ride-alongs, so senior techs move faster.
- Stage common parts on trucks before the surge. Capacitors, contactors, motors and fittings are what you'll run out of.
- Set a rule for how long a tech stays on one job before calling in.
- Keep an eye on hours. Exhausted techs make mistakes, get hurt and quit. Heat is a serious safety hazard in attics and on roofs. See reducing safety risk.

TELL THE TRUTH ABOUT WAIT TIMES

"We'll try to get there today" is what creates angry customers. It's better to say: "The earliest I can promise is tomorrow between 10 and 2. If something opens sooner, I'll call you." If the time changes, call them first.

TRACK EVERY CALLBACK

In a surge, the worst failure is losing someone. Keep one list of everyone waiting, with the time they called and what they were told. Assign one person to work it. Don't let it live on sticky notes.

REVIEW IT AFTERWARD

Within a week, hold a short meeting. How many calls did you get, and how many did you answer? How many jobs did you run? What ran out? Who went above and beyond? Update the plan while the memory is fresh, and thank your team in a way they can feel. Use the surge plan template to get started.

Sources: White Paper 09.

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BEST PRACTICES: MISSED CALLS

MAKE IT A HABIT

What good looks like

> Aim to answer at least 9 in 10 calls live during business hours.

> Aim to pick up within about 20 seconds.

> Every voicemail and missed call returned within minutes, not by the end of the day.

The habits

1. Measure your true answer rate by hour of day, not your gut feel. Most owners guess high.
2. Cover the gaps on purpose: lunch, the first and last hour of the day, Saturdays and the first big weather day.
3. Set an overflow rule: after a set number of rings or calls waiting, calls roll to a second person or an outside team.
4. Return every missed call fast, with a named owner for the call-back list.
5. Write a short after-hours plan: what counts as an emergency, who is on call and what the caller is told.
6. Listen to five recorded calls a week and coach one thing at a time.

Signs it's time to get help

- Your answer rate is under 80% in your busiest hours.
- Your dispatcher answers phones and runs the board at the same time.
- Weather days or ad spikes regularly swamp the office.

How one shop did it: Bonney Plumbing (multi-brand plumbing, HVAC and electrical company). Merged five brands' customer service teams into one team that can answer for any brand, stretched coverage to seven days without adding staff, and coaches with call transcripts and role-play. Booking rate rose from 35% to 41%, missed calls fell from 10% to 4%, and abandoned calls fell from 12% to 4%. Case study published by its software provider, April 10, 2025

Where we fit: Service ProCall answers overflow, lunch, after-hours and surge calls in your name, and books into your own software.

More on missed calls