Missed-call and after-hours checklist for trades

By AJ Awan, Flowtivity | Updated 28 October 2026 | Version 1.0

For Australian plumbing and trade businesses using voicemail, a receptionist, a shared inbox or automated call intake. This checklist helps a small team record an enquiry and hand it to a person who can decide what happens next.

How to use it in 15 minutes

1. Minutes 1-4: name coverage hours, primary and backup contacts, and the record location.
2. Minutes 5-8: agree the immediate-danger, urgent-review and routine routes.
3. Minutes 9-12: rehearse a fictional missed call and an unanswered primary alert.
4. Minutes 13-15: assign a weekly reviewer and choose a review time. Use the blank record for each enquiry.

This is an intake and handoff checklist, not technical diagnosis or emergency advice. In an emergency needing police, fire or ambulance, call Triple Zero (000). Do not delay an emergency call while completing a form or waiting for a trade callback.

1. Agree coverage and the people responsible

[ ] Test the primary and backup contact methods using a fictional message. Confirm acknowledgement can be recorded.

[ ] If nobody is monitoring after hours, say so clearly in the greeting. Do not advertise an emergency response you cannot provide.

[ ] Set callback and acknowledgement targets that match the roster. These are internal working targets, not guaranteed attendance or emergency response times.

Business, service area and checklist owner

Business hours, after-hours coverage and time zone

Primary on-call person, contact method and roster location

Backup person, contact method and when to escalate

Person who checks missed calls when coverage resumes

Approved channels, record location, access permissions and retention period

---

Version approved by and next review date

---

2. Capture the essentials on every call

Keep the caller's own description. Confirm uncertain details by reading them back, rather than filling gaps with a guess. If the caller describes immediate danger, use the emergency route first. Collect only information needed for the enquiry.

Call or message received: date, time, time zone and channel

Caller name and callback number, read back to confirm

Job location: address or location, suburb and state

Caller's words describing the request and when it started

Any reported immediate danger or safety concern, in the caller's words

Access or contact constraints relevant to a callback or visit

Enquiry type: immediate danger / urgent human review / routine / unclear

Next step explained to caller and communication channel

Assigned person, alert sent time, acknowledgement and callback outcome

Do not ask for payment-card details, passwords, alarm codes or identity documents for basic intake. Keep access instructions in an approved restricted record if they are needed. Have the business owner decide whether recording or transcription is appropriate and which notice, consent, privacy and retention requirements apply before switching it on.

Version 1.0 | Updated 28 October 2026 | CC BY 4.0

3. Route urgency without making a diagnosis

Route	Example of what the caller reports	What intake does
Immediate danger	A serious injury, fire or immediate threat to life or property requiring police, fire or ambulance.	Direct the caller to 000 now. Do not keep them in an intake queue or promise that a trade callback will make the situation safe. Alert your person without delaying the emergency call.
Urgent human review	An active leak, wastewater overflow, loss of an essential service, a reported safety concern or uncertainty about urgency.	Record the description and essential contact/location details, then alert the named on-call person. A qualified person assesses the situation and decides the response.
Routine follow-up	A quote, planned maintenance, booking change or non-urgent question.	Record the request and preferred contact time. Route to the next monitored work queue and explain the approved callback window.

A reported gas smell or electrical hazard goes straight to a person under your approved safety procedure. Intake must not invent fault-finding, isolation or repair instructions. Where immediate danger requires emergency services, use 000. If urgency is unclear, request human review and retain the caller's words.

4. Set targets and a failed-handoff fallback

Choose the timings yourself after checking actual coverage. Leave a target blank until an owner agrees it. Do not publish or quote it to callers as an assured response. The emergency route always takes priority over callback targets.

Working target	Your agreed rule
Urgent acknowledgement	Primary person to acknowledge within ___ while on call. If no acknowledgement, alert ___ by ___ method.
Urgent callback decision	Named person decides callback/attendance priority by ___ and updates the record. Never promise an arrival before confirmation.
Routine missed calls	Reviewed by ___ at ___; aim to call back within ___ during monitored hours.
Coverage unavailable	Approved honest message to caller: ___; backup or alternative contact information approved by owner: ___
Unable to reach caller	Attempts at ___; approved message ___; owner and next review ___

Example only: a business with a staffed evening roster might set a 5-minute alert-acknowledgement target and escalate to its backup if it is missed. Another business might offer next-business-day routine callbacks. These are illustrative choices, not standards, safety advice or promises from AI Plumb.

5. Complete the handoff to a person

Suggested message after an alert has actually been sent: "I have recorded your details and alerted the on-call person. A person will confirm whether we can help and what happens next. This does not confirm a booking or arrival time." Adapt it to the actual status.

Version 1.0 | Updated 28 October 2026 | CC BY 4.0

[ ] Send the job location, confirmed callback number, caller's exact description, reported concern and time received to the assigned person through the approved channel.

[ ] Record who acknowledged the alert and when. Sent is not the same as accepted.

[ ] If the primary person does not acknowledge within your agreed window, use the named backup and record the result.

[ ] If no person is available, use the owner-approved unavailable message. Do not imply a plumber is booked or on the way.

[ ] Have the human owner record the callback outcome, agreed action, price or booking approval, and any follow-up owner.

[ ] Close the record only when the next step is confirmed or the owner records why it remains unresolved.

6. Where a person must decide

A qualified trade professional makes technical assessments and gives technical advice. An authorised dispatcher follows the business's approved triage and escalation procedure and confirms availability only within their authority. A person with the relevant authority decides scope, service-area exceptions, price and attendance. Automation may capture, flag and route an enquiry; it must not diagnose, approve work or invent a callback, quote or arrival commitment.

Who may give technical advice, approve prices and confirm attendance?

Who takes over unclear, distressed or sensitive conversations?

What requires owner approval before a message or booking is sent?

---

7. Review the missed calls every week

Choose a short weekly check with the owner and the people who answer calls. Compare completed handoffs with the agreed rules. A large call count alone does not show that customers received a response.

[ ] Review every unacknowledged urgent alert and unresolved record. Confirm a human has taken ownership.

[ ] Test an unclear enquiry and a failed primary contact after any roster or system change.

[ ] Correct a routing rule or greeting when coverage changes. Review record access and retention.

Review item	This week
Period and reviewer	_____
Missed enquiries checked	Total ___; records missing a callback number or location ___
Urgent alerts	Sent ___; acknowledged ___; backup used ___; unresolved ___
Callbacks	Completed ___; missed internal target ___; unable to reach ___
Promises and errors	Any unsupported diagnosis, incorrect booking or unapproved time/price promise? ___
One improvement	Change ___; owner ___; due ___; test call completed ___

Version 1.0 | Updated 28 October 2026 | CC BY 4.0

Illustrative worked example, using fictional details

At 6.10 pm a caller says, "Water is coming through the laundry ceiling." The receptionist confirms the callback number and a fictional Brisbane address, captures the words without diagnosis and flags urgent human review.

The business has chosen a 5-minute acknowledgement target for its staffed evening roster. The primary plumber does not acknowledge, so the receptionist contacts the named backup at 6.15 pm. The backup acknowledges at 6.17 pm and takes ownership of the callback. These timings illustrate a chosen internal rule, not an emergency response commitment.

The receptionist tells the caller only that the details were recorded and the on-call person alerted. The plumber then assesses the reported situation, decides the next step and confirms any attendance directly. The record includes the callback outcome and owner. If the caller instead reports immediate danger requiring police, fire or ambulance, the emergency-services route takes priority and the caller is directed to 000 without waiting for this sequence.

At the weekly review, the owner checks why the primary alert went unanswered and retests the roster. The checklist works with a paper diary or voicemail as well as a call-intake system.

Where a person must decide

- A qualified trade professional makes technical assessments and gives technical advice. An authorised dispatcher follows approved triage and escalation rules and confirms availability within their authority.

- A person approves prices, service-area exceptions, attendance and any booking or callback commitment.

- Unclear, distressed or sensitive conversations transfer to a person. Intake captures and routes facts without diagnosis.

Sources and further guidance

ACMA: Emergency calls

Official guidance on using Triple Zero for urgent police, fire or ambulance help. A trade callback is not an emergency-services response.

OAIC: APP 3, collection of solicited personal information

Guidance for entities covered by the Privacy Act on necessary and proportionate collection. Check which privacy and recording obligations apply to your business.

Use and share this template

Free to use and adapt. Please credit AI Plumb by Flowtivity. Licensed under Creative Commons Attribution 4.0 International (CC BY 4.0). You may share and adapt it, including commercially. Retain attribution, link to the licence and indicate changes.

Creative Commons Attribution 4.0 International (CC BY 4.0)

Want help putting this in place?

Use this checklist with your existing phone and diary. If you want help testing call intake, roster alerts and human approval, book a free 1-hour consult with AJ. Bring a fictional enquiry and your handoff rules.

Book a free consultation