Map the route before you test

For the HVAC owner, dispatcher and phone provider. Use labels or internal IDs, not customer details.

WORKSHEET ID _____ DATE _____ PROVIDER / TOOL _____

1 Call route and message permission

BUSINESS LINE LABEL > FIRST RING DESTINATION

UNANSWERED DESTINATION / VOICEMAIL PATH

TEXT SENDER LABEL / TEST CALLER LABELS

SERVICE MESSAGE PURPOSE / HOW PERMISSION IS RECORDED

PRIVATE EVIDENCE LOCATION / NO-TEXT CALLBACK FALLBACK

2 People and coverage

REPLY OWNER ROLE _____ BACKUP ROLE _____

STAFFED HOURS + TIME ZONE / ROUTE TO RESTORE IF TEST FAILS

- ☐ Documented trigger and provider readiness checked
- ☐ Established customer call path kept during controlled testing

CALLBACK-SPECIFIC TEST NOTE

One service text needs the caller's press-1 permission and readiness checks. A prior consent record, including Test mode, withholds a new prompt for 60 minutes. Use separate consenting test numbers or wait; do not disable suppression.

Run STOP last. Plain START is not a reset: verify provider opt-in and obtain fresh permission for a new service request.

Guide: callbackhvac.com/blog/text-back-missed-hvac-calls/

Check what actually happened

Use consenting test participants. Write the result and a private evidence reference for every check.

ROUTE / RUN ID _____ DATE + TIME _____

☐ Simulation ☐ Controlled live test

Simulation does not prove live delivery. Apply your provider's consent and repeat-call rules before each case.

CHECK / WHAT TO VERIFY	RESULT	OBSERVATION / REFERENCE
1 Answered call Correct answered record; no unnecessary missed-call text.	☐ Pass ☐ Issue ☐ Not run	
2 Unanswered + permission Record the permission, sender, provider status and handset receipt.	☐ Pass ☐ Issue ☐ Not run	
3 No permission Verify the documented no-send behavior. No consent is not delivery failure.	☐ Pass ☐ Issue ☐ Not run	
4 Voicemail / early hang-up Record call outcome and prompt access. Rule out cooldown or opt-out.	☐ Pass ☐ Issue ☐ Not run	
5 Repeat caller Count texts and records against the documented repeat-call rule.	☐ Pass ☐ Issue ☐ Not run	
6 Reply + human handoff Find the reply; verify owner action and any configured alert separately.	☐ Pass ☐ Issue ☐ Not run	
7 After hours Check the correct response window and real coverage. No implied dispatch.	☐ Pass ☐ Issue ☐ Not run	
8 STOP / opt-out Run last for that number. Verify suppression; separate confirmation from service texts.	☐ Pass ☐ Issue ☐ Not run	

A sent status does not prove delivery. Handset receipt does not prove the person read it or booked a visit. A blank or 'Not run' result stays unverified.

Policy for CallBack-specific handling: callbackhvac.com/sms-policy/

Record real follow-up outcomes

Use one seven-day window and consistent definitions. Exclude test runs; use internal IDs.

WINDOW START / END

REVIEW OWNER ROLE

3 Seven-day manual tally

Tally only requests covered by this audit. Count each first reply and confirmed booking once; repeated calls are separate events. Keep supporting details in your private system.

Date	Supported missed calls	Consented text attempts	Requests with first reply	Confirmed bookings	Private record / note

4 Booking proof: use IDs, not customer details

Internal request ID	Booking confirmed on	Private calendar / job reference	Confirmed by role

NEXT ACTION / OWNER ROLE / RETEST DATE

Booked work is not collected revenue. Reconcile payments and gross profit separately. This manual audit records evidence; it does not certify compliance or prove a financial return.

Playbook: callbackhvac.com/hvac-missed-call-revenue-leak-calculator/