CALL FLOW TEMPLATE

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HELP YOUR TEAM HANDLE CALLS WITH CONFIDENCE, EVEN DURING YOUR BUSIEST TIMES.

Step 1: Who Answers First?

Name/Role:

Location or Extension

What to say:

"Thanks for calling [Business Name], how can I help you today?"

Step 2: If They're Not Available

Backup Person/Team:

How backup is triggered:

○ Ring group   ○ Call forward   ○ Manual transfer

What to say if transferring:

"Let me transfer you to someone who can help."

Step 3: If No One Can Answer

Where does the call go?

○ Voicemail   ○ Auto-attendant   ○ Overflow queue

Voicemail Script Example:

"You've reached [Business Name]. We're currently helping other customers. Please leave a message, and we'll get back to you as soon as we can."

Who checks voicemail?

How often?

○ Hourly ○ Daily ○ Other

Step 4: Who Handles What?

Use this section to assign call types to specific team members.

Call Type	Person/Team Responsible
Appointments / Bookings	
Sales Inquiries	
Tech Support / Issues	
Billing / Payments	
Emergencies	

Step 5: After-Hours Setup

Auto-attendant or Voicemail?

○ Voicemail   ○ Auto-attendant

Script Example:

"Thanks for calling [Business Name]. Our office is currently closed. Our hours are [insert hours]. Please leave a message and we'll return your call on the next business day."

Step 6: Escalation Plan

If a voicemail or message is urgent, who handles it?

Escalation Contact Name:

Phone or Extension:

QUICK TIP Post this beside the phones, or save a copy digitally so your team can access it anytime.

Need help improving your business phone setup? Our team can support you with call flow planning and advanced phone features like call groups, forwarding, and auto-attendants.