THE SURGE IS ON THE CALENDAR. SET THE PHONES UP BEFORE IT ARRIVES.

Peak season call coverage checklist

Six weeks, two weeks and the night before: what to set so the first heatwave, freeze or storm is answered, triaged and booked.

How to use it: fill page 1 once per season. Keep page 2 by the phone for surge days.

01 / YOUR PEAK WEEKS

TRADE	WHEN CALLS SPIKE	YOUR DATES THIS YEAR
HVAC	First heatwave, first hard freeze	
Plumbing	The freeze, and the thaw a few days later	
Grease trap, used cooking oil	Thanksgiving to New Year's	
Septic	Spring thaw, heavy-rain weeks	
Roofing, restoration	Storm and hurricane season	

02 / SIX WEEKS OUT

- ☐ Busiest hour last season noted (not the daily average)
- ☐ Concurrent-call limit checked against that hour
- ☐ Coverage windows set for peak weeks (after hours, overflow, every call)
- ☐ Ring time before the voice agent answers agreed with CSRs
- ☐ Business knowledge updated: service area, hours, seasonal services

03 / TWO WEEKS OUT

- ☐ Seasonal emergency rules written in your own words
- ☐ Unsure calls go to a person, never guessed
- ☐ Transfer targets and on-call rota for each peak week
- ☐ Transfer-failed path set (callback, not silence)
- ☐ Booking path checked: booked, or request for the office

04 / SEASONAL EMERGENCY RULES (YOUR WORDS)

CALLER SAYS...	AGENT DOES FIRST	CALL GOES TO

What counts as an emergency is your company's decision. Read your own safety wording exactly as written.

FieldCamp Peak Season Call Coverage Checklist

05 / THE NIGHT BEFORE THE FIRST SURGE

- [ ] Test call placed after hours, and one during a busy line
- [ ] Tonight's on-call name is right, and the backup knows
- [ ] Holiday exceptions are in the schedule, not a manual forward
- [ ] CSRs know which calls the voice agent will take
- [ ] Someone owns the morning review of overnight calls

06 / SURGE-DAY RULES

WHEN...	THEN...
Every CSR is on a line	The voice agent answers after the ring time you set
A caller matches an emergency rule	Transfer to the on-call tech; if it fails, take a callback number
The agent is unsure	Route to a person or queue for review, never guess
No technician window is free	Say the office will confirm a time; never promise one

07 / AFTER THE SURGE

Calls answered by voice agent _____ Transferred to a person _____

Booked or request created _____ Rules to change next season _____

How FieldCamp AI Receptionist uses this sheet

Your call flow rings your team first. The voice agent takes the calls they can't reach, triages them on the rules you wrote, and books the job or hands it to your people. Coverage windows can be widened for peak weeks and narrowed again after.

08 / SIGN-OFF

Set up by _____ Date _____

Peak season _____ Shared with _____