

Automation Templates

Plug-and-Play Workflows for Your After-Hours System

Overview

These templates connect your after-hours answering system to your other tools — CRM, notifications, follow-up sequences. Choose the platform you use (Make.com, Zapier, or native integrations) and follow the setup instructions.

Platforms Covered: Make.com (formerly Integromat), Zapier, and native integrations for popular HVAC software (ServiceTitan, Housecall Pro, Jobber).

Template 1: Voicemail-to-CRM Workflow



Voicemail Transcription → Lead in CRM

Never manually enter a voicemail again

What it does: When someone leaves a voicemail, it automatically creates a lead in your CRM with the transcribed message, phone number, and timestamp. Tags it as "after-hours" for easy filtering.

TRIGGER: New voicemail received

↓

Step 1: Get voicemail transcription (from OpenPhone, Goodcall, or phone provider)

↓

Step 2: Extract caller phone number + transcription text

↓

Step 3: Create new lead/contact in CRM

- Name: [From transcription or "After-Hours Lead"]
- Phone: [Caller's number]
- Notes: [Full transcription]
- Tag: "after-hours", "needs-callback"
- Source: "After-Hours Voicemail"

↓

Step 4: Send notification to owner (text + email)

Make.com Setup

Module 1: Trigger

Select: Webhooks → Custom Webhook

Connect your phone provider's voicemail webhook URL

Module 2: Parse Data

Map: `{{transcription}}`, `{{caller_phone}}`, `{{timestamp}}`

Module 3: Create CRM Record

Connect: ServiceTitan, Housecall Pro, Jobber, or Google Sheets

Map fields from Module 2

Module 4: Send SMS Notification

Connect: Twilio or your phone provider

Message: "New after-hours voicemail from {{caller_phone}}: {{transcription | truncate:100}}"

Zapier Setup

Step	App	Action
1	OpenPhone / Goodcall	New Voicemail (Trigger)
2	Housecall Pro / Jobber	Create Customer
3	SMS by Zapier	Send SMS to your number

Template 2: Emergency Dispatch Notification



Emergency Call → On-Call Tech Alert

Immediate notification with escalation

What it does: When an emergency call is flagged, immediately notifies your on-call technician via text AND call. If no response within 10 minutes, escalates to backup tech or owner.

```
TRIGGER: Emergency call detected (from AI answering service)
```

↓

```
Step 1: Send SMS to on-call tech
```

```
"EMERGENCY: [Customer Name] at [Address]
```

```
Issue: [Description]
```

```
Callback: [Phone]
```

```
Reply OK to confirm."
```

↓

```
Step 2: Wait 2 minutes
```

↓

```
Step 3: Call on-call tech (robocall with details)
```

↓

```
Step 4: Wait 8 minutes
```

↓

```
Step 5: Check for "OK" reply
```

↓

```
IF NO RESPONSE:
```

```
→ Send SMS + call to backup tech
```

```
→ Notify owner: "Emergency not acknowledged. Escalating."
```

Make.com Setup

Module 1: Webhook Trigger

Receive emergency data from Goodcall/Smith.ai webhook

Data includes: customer name, phone, address, issue

Module 2: Send SMS

To: On-call tech phone

Message: Emergency template with customer details

Include: "Reply OK to confirm receipt"

Module 3: Delay (2 minutes)

Use Sleep module

Module 4: Make Phone Call

Use Twilio "Make Call" with TTS

Script: "Emergency dispatch for [COMPANY]. Customer [NAME] at [ADDRESS] has [ISSUE].

Please call back immediately."

Module 5: Delay (8 minutes)

Module 6: Check for Reply

Use Twilio "Get Messages" filtered by on-call tech number

Look for "OK" in last 10 minutes

Module 7: Router (If/Else)

IF OK received → End workflow

ELSE → Continue to escalation

Module 8: Escalation

Repeat SMS + call to backup tech

Notify owner via SMS

Important: Set up your on-call rotation schedule. Update the "on-call tech" phone number weekly or integrate with your scheduling software.

Template 3: Lead Follow-Up Sequence



New Lead → Automated Follow-Up

Never let a lead go cold

What it does: When a new lead comes in (call, form, voicemail), triggers a follow-up sequence: immediate confirmation, Day 2 check-in, Day 7 review request (if job completed).

TRIGGER: New lead created in CRM

↓

IMMEDIATELY:

→ Send SMS: "Thanks for calling [COMPANY]! We received your message and will follow up within [TIMEFRAME]."

↓

DAY 1 (after job completed):

→ Send SMS: "Hi [NAME], this is [TECH] from [COMPANY]. Thanks for choosing us today! Any questions about the work we did, just reply to this text."

↓

DAY 7 (if job completed):

→ Send SMS: "Hi [NAME], hope your [AC/heater] is running great! If you have a minute, we'd really appreciate a Google review. [REVIEW LINK]. Thanks for your business!"

Text Message Templates

Timing	Message
Immediate (confirmation)	"Thanks for contacting [COMPANY]! We received your message and will call you back within [X] hours. Questions? Reply to this text."
Day 1 (post-service)	"Hi [NAME], [TECH] from [COMPANY] here. Hope everything's working great! If you have any questions about today's service, just reply."

Day 7 (review request)

"Hi [NAME]! If you're happy with our service, we'd love a quick Google review: [LINK]. It really helps our small business. Thanks!"

Setup in CRM

Most HVAC CRMs (ServiceTitan, Housecall Pro, Jobber) have built-in automation for this:

1. Go to Settings → Automations / Workflows
2. Create new automation triggered by "New Customer" or "Job Completed"
3. Add SMS actions with delays
4. Insert your review link (get from Google Business Profile)

Template 4: Missed Call Recovery



Missed Call (No Voicemail) → Auto-Text

Recover leads that didn't leave a message

What it does: When a call goes unanswered AND no voicemail is left, automatically sends a text to the caller. Captures leads who would otherwise disappear.

```
TRIGGER: Missed call detected + no voicemail
↓
WAIT: 1 minute (in case they call back)
↓
SEND SMS:
  "Hi! We saw we missed your call at [COMPANY].
  Sorry about that — how can we help?
  Reply here or call us back at [NUMBER]."
```

↓

```
IF REPLY RECEIVED:
  → Create lead in CRM
  → Notify owner
  → Continue conversation via text
```

Implementation Options

Platform	How to Set Up
OpenPhone	Settings → Auto-replies → "Send when call is missed (no voicemail)"
Goodcall	Built-in feature — enable in Settings → Missed Call Handling
Make.com / Zapier	Webhook from phone provider → Filter (missed + no VM) → Send SMS via Twilio

Pro Tip: Track your missed-call-recovery conversion rate. Most contractors see 20-30% of these texts result in booked jobs. That's revenue you would have lost completely.

Suggested Text Message

Keep it short, friendly, and low-pressure:

Version 1 (Simple):

"Hi! Saw we missed your call. How can we help? -[COMPANY]"

Version 2 (Helpful):

"Sorry we missed you! If you're having an HVAC issue, reply here with details and we'll get right back to you. -[COMPANY]"

Version 3 (Urgent):

"Missed your call — if it's an emergency, reply URGENT and we'll have a tech call you within 15 min. Otherwise, we'll reach out tomorrow. -[COMPANY]"

Quick Start: Choose Your Path

Not sure where to start? Here's our recommended priority:

Priority	Template	Impact	Effort
1	Missed Call Recovery	★★★★★	Low (10 min)
2	Emergency Dispatch	★★★★★	Medium (30 min)
3	Voicemail-to-CRM	★★★★	Medium (30 min)
4	Lead Follow-Up	★★★	Low (15 min)

Start with #1 (Missed Call Recovery). It's the easiest to set up and has immediate ROI. You can have it running in 10 minutes.

Need Help?

If you get stuck on any automation:

1. Check your phone provider's help docs — most have step-by-step guides
2. Search YouTube for "[Your Provider] + Zapier/Make tutorial"
3. Contact Axionis support — we're happy to help

HVAC After-Hours Domination System

© 2026 Axionis — axionis.io