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The Dispatcher Playbook

For owners hiring a dispatcher, and for the person in the seat: what makes or breaks the role, how to prioritize when the day falls apart, and the warning signs to catch before the phone rings.

THE JOB IN ONE LINE

A dispatcher keeps promises: to customers (when you will arrive), to the field team (what they are walking into) and to the owner (what got done and what did not). Everything in this playbook serves that.

1. What makes or breaks a dispatcher

The difference between a good and a bad hire rarely shows up in the interview. It shows up in these habits by week three.

MAKES A DISPATCHER	BREAKS A DISPATCHER
+ Builds tomorrow before leaving today. The board is set, confirmed and balanced by end of day.	x Runs the day from memory, texts and sticky notes.
+ Re-plans at set times. Two planned check-ins beat forty reactive changes.	x Says yes to every "can you fit me in today" without checking capacity.
+ Matches the job to the right person: skills, location, what is on the truck, hours left.	x Stacks the morning full and lets the afternoon collapse.
+ Calls the customer before the customer calls. Running late means a new time, not silence.	x Lets jobs end without a closeout, so callbacks and unbilled work pile up.
+ Keeps one source of truth. If it is not on the board, it did not happen.	x Is the only person who knows where things stand.
+ Sends the field team complete job info, once. No "call me when you get a sec."	x Treats every call as urgent, so nothing actually is.
+ Closes every loop. Each job ends as done, return visit, parts needed or quote needed.	x Forgets the vehicles until one is down on the busiest day.

Quick self-check: is your dispatch at risk?

Answer honestly. Two or more "no" answers means sections 2 and 3 are where to start.

- YES ☐ NO ☐ Could someone else run tomorrow if your dispatcher called in sick?
- YES ☐ NO ☐ Do customers hear about a delay from you before they have to call?
- YES ☐ NO ☐ Is every open job on one board, with a name next to it?
- YES ☐ NO ☐ Do you know which vehicles have service or inspection due this month?
- YES ☐ NO ☐ Can you see where today stands without making a phone call?

2. How to prioritize when the day falls apart

When two things collide, the higher rung wins. Decide the order once, write it down, and the dispatcher stops making the same judgment call twenty times a day.

1	**Safety and true emergencies** Anything that can hurt someone or cause damage now: a gas smell, an active leak, a driver at their legal hours limit, an unsafe vehicle, a site that is not safe to work.
2	**Promises already made** A committed arrival window or delivery time. Breaking a promise costs more than turning down a new job.
3	**Customers you have agreements with** Contract and repeat accounts are your recurring revenue. Protect them.
4	**Work that is ready to run** Large jobs with parts, crew and access confirmed. Moving them wastes the prep and often a full day.
5	**New same-day requests** Take them if there is real capacity. If not, offer the next real slot, not a maybe.
6	**Flexible work** Routine maintenance, estimates and internal tasks move first, but never move the same job twice.

TIE-BREAKERS ON THE SAME RUNG

The narrower time window wins. Then the shorter drive. Then the tech or driver who already has the skills and the parts.

THE BUMP RULE

When something has to move, move the most flexible job, call that customer yourself, and rebook them on the same call. Never "we will call you back."

CAPACITY RULE OF THUMB

Book to about 80 percent of available hours. The rest absorbs emergencies, overruns and drive time. A board planned to 100 percent is already late.

3. What to watch for

Every bad day sends signals by mid-morning. These are the ones worth reacting to.

SIGNAL	WHAT IT USUALLY MEANS	WHAT TO DO
Someone is 30+ minutes behind on their first job	The whole route is at risk	Re-plan now. Move flexible work and warn the next customers.
Tomorrow is not confirmed by 3 pm	No-shows and wasted drives	Confirm or replace those jobs before end of day.
A job with no parts or material confirmed	A wasted trip and a return visit	Hold or swap it until the parts are confirmed.
"It is handled," with nothing on the board	Nobody actually owns it	Put it on the board with an owner and a time.
The same customer calls twice in one day	A broken promise in progress	Call them first, with a real answer.
Jobs closed with no notes or photos	Callbacks you cannot explain, work you cannot bill	No closeout, no job complete.
A return visit on the same job within 30 days	A training or parts problem, not bad luck	Review weekly and fix the pattern.
A service, inspection or registration date within 30 days	A vehicle down when you need it	Book it now, during a slow block.
The dispatcher answers slower and notes get shorter	The seat is overloaded	Cut what they handle, or the whole day slips.

The daily rhythm

Set times turn constant firefighting into a few planned decisions.

- **Start of day** — Everyone in, vehicles ready, first jobs confirmed. Send the day plan.
- **Mid-morning check** — Who is behind, who is ahead. Move flexible work.
- **Early afternoon check** — Lock the afternoon. Call any customer whose window is at risk.
- **Late afternoon** — Build and confirm tomorrow. Parts, people and vehicles checked.
- **End of day** — Closeouts in, handoff written, owner view sent.

4. Hiring: five questions that show who can dispatch

Ask them exactly like this. The answers tell you more than the resume.

1. **"It is 10 am. Two techs are an hour behind and an emergency call comes in. Walk me through the next 15 minutes."**
   Listen for: A clear order: the emergency first, then calling the customers about to be late, then moving flexible work.

2. **"A customer is angry that nobody showed up. What is the first thing you say?"**
   Listen for: They acknowledge it, own it and give a specific new time. They do not blame the tech.

3. **"How do you know at 4 pm that tomorrow is ready?"**
   Listen for: Confirmations, parts, people and vehicles all checked. A vague answer is a red flag.

4. **"Tell me about a time you said no to protect the schedule."**
   Listen for: They can hold a line politely. Pure yes-people overbook.

5. **"What would you want written down before your first day?"**
   Listen for: They ask about rules and priorities, not just software logins.

> **TRY THIS**
> Give your top two candidates a 15-minute scenario: 8 jobs, 3 techs, one emergency and one tech calling in sick. Ask them to rebuild the day out loud. You will learn more than in an hour of talking.

Numbers to review every week

Ten minutes, owner and dispatcher together. Watch the trend over four weeks, not any single number.

On-time arrivals	Share of jobs reached inside the promised window.
Jobs completed per tech or truck per day	Capacity in use. Falling numbers usually mean routing or parts problems.
Return visits within 30 days	The cost of rushed or incomplete work.
Same-day requests: taken vs. turned away	Revenue you could not capture.
Same-day closeouts	Jobs closed with notes and photos on the day they were done.
Unplanned vehicle downtime	Days a truck or van was out when it should have been working.

5. The first 30 days for a new dispatcher

Week 1 Learn the map	Shadow whoever does it today. List every recurring job, who owns it and where its details live. Write down the 10 questions they will ask most.
Week 2 Run it with a safety net	Take one shift or one area. Every job goes on one shared board: job, owner, status, next step. Review with the owner daily.
Week 3 Own the exceptions	Write down what happens when a call cancels, a vehicle is down or a crew runs late. Turn each into a 3-step rule.
Week 4 Hand it back cleaner	Fix the three things that slipped most. Set reminders on anything that expires. Agree on a 5-minute weekly owner review.

6. End-of-shift handoff checklist

Filled in at the end of every shift. The next person reads it before touching anything.

- ☐ Open jobs, and who owns each one _____
- ☐ Anything promised to a customer for tomorrow _____
- ☐ Trucks, vans or equipment that are down or due for service _____
- ☐ Techs, drivers or crew who are out, late or covering _____
- ☐ Changes made today that others have not seen yet _____
- ☐ Calls or messages still waiting on a reply _____
- ☐ Anything that could become a problem by morning _____
- ☐ Who has it now _____

7. Service-date tracker

Anything with an expiry date goes in one place, with a reminder before it is due. Copy the columns into a spreadsheet or print this page.

Vehicle or equipment	Next service	Inspection	Registration / permit	Owner	Notes

- Sort by the earliest date. Anything within 30 days gets a calendar reminder.
- Add a second reminder 7 days out, to the person who can act on it.
- Review it every Monday. Five minutes.

Daily owner view

Five lines the owner can read in a minute, without calling anyone.

Today's jobs _____

Late or at risk _____

Down or out of service _____

Out tomorrow _____

Needs a decision from me _____

NEXT STEP

Want this running as a live board with automatic reminders, built around how your team already works? That is what Velox sets up. Reply to the email this came with, or write to hello@runvelox.com.