Human handover rules

Automation greets, people close. Opening hours: _____ Owner: _____

Example: a hair salon in Brooklyn

Rule table (example: a hair salon in Brooklyn)

Situation	Goes to	Time (open hours)	After hours
Price question	Front desk (Dana)	10 min	Away message + pricing page
Reschedule	Front desk (Dana)	10 min	Booking link
Complaint	Salon manager (Emily)	30 min	First thing next day
Scalp or skin question	Stylist (Mia)	Same day	Next day; no diagnosis by message
Second call in a day	Whoever is free	Right away	Next day 9:30
Promotion request	Front desk	10 min	Only to people who opted in

Your table

Situation	Goes to	Time (open hours)	After hours

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Build checklist

Every DM, every WhatsApp message, every form and every missed call turns into a reply and a booking path within minutes.

One inbox

Tools: Meta Business Suite, WhatsApp Business (both free) · Time: 2 hours, once

- [ ] Switch Instagram to a professional account and connect it to your Facebook page.
- [ ] Open the inbox in Meta Business Suite; add the people who answer messages, with their own access.
- [ ] Install WhatsApp Business on the business number; fill in profile, address, hours and catalogue.
- [ ] Set labels: New, Asked price, Booked, Follow up, Closed.
- [ ] Write down who watches the inbox, and when.

First reply

Tools: Meta Business Suite automated responses, WhatsApp Business messaging tools · Time: 1.5 hours

- [ ] Pull the 10 most common questions from last month's messages.
- [ ] Write the instant reply: thanks, the reply time during opening hours, the booking link and the pricing page.
- [ ] Write the away message for after hours: when you will reply and how to book without waiting.
- [ ] Save quick replies for the five most common questions; the team personalises them before sending.
- [ ] Test everything from your own phone, writing as a customer would.

Missed calls

Tools: A cloud phone system or your phone's call log, WhatsApp Business or SMS · Time: 1 hour

- [ ] If you use a cloud phone system, set an automatic text or WhatsApp message for missed calls.
- [ ] No cloud system? Start simple: at 12:00 and 18:00 every day, send a short message to the missed-calls list.
- [ ] The message: who you are, why you couldn't pick up, the booking link and when you'll call.
- [ ] Put anyone who calls twice in a day first; it usually means it's urgent.

Online booking

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Tools: Google Calendar appointment schedules or an industry booking platform · Time: 2 to 3 hours
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- [ ] Choose a booking tool: a platform built for your industry, or Google Calendar's appointment schedules.
- [ ] Add services with their real durations; leave buffer time between them.
- [ ] Put the link on your Instagram profile, in the WhatsApp greeting, on your Google Business Profile and on your site.
- [ ] Add the address, parking and how to prepare to the booking confirmation.

Reminders and follow-up

Tools: Your booking tool's reminders, WhatsApp Business labels · Time: 1 hour

- [ ] Set an automatic reminder 24 hours before each appointment, with a cancel and reschedule link.
- [ ] Two days after someone asks a price and doesn't book, send one follow-up message.
- [ ] No reply? Label it "Closed" and let it go.
- [ ] Send promotional messages only to people who opted in; keep reminders and promotions apart.

Build order

DAY 1	DAY 2	WEEK 1	WEEK 2	MONTH 1
Connect the accounts; set up the Meta Business Suite inbox and WhatsApp Business.	Write the first reply, the away message and quick replies; test them yourself.	Set up the booking tool and add the link to every channel.	Turn on missed-call messages and reminders; give the team the handover rule in writing.	Compare first-reply time, missed calls and message-to-booking rate with week one.