# Dispatcher's daily checklist

Sheet 1 of 3

One sheet per week, Monday to Sunday. Tick each line every day you run trucks. A blank box is a question for the next morning.

DISPATCHER

WEEK STARTING

BRANCH

| TASK | MON | TUE | WED | THU | FRI | SAT | SUN |
|---|---|---|---|---|---|---|---|
| **Before the first truck leaves** | | | | | | | |
| Every crew has its jobs, its paperwork, and its truck for today | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Availability for the next 7 days sent to sales, in plain words | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| **While the crews are out** | | | | | | | |
| First call to every crew lead, between 8 and 10 am. All rolling on time | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Each crew confirmed on site. Customer told if a crew is late | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Crew lead confirms the estimate matches the job before work starts | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Office calls each customer once, mid-move, to ask how it is going | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Second jobs: the customer has a real arrival time, updated if it slips | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Every call written in the crew log | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| **At 4:30 pm** | | | | | | | |
| Missing jobs check: everything sales booked is on the board | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Tomorrow's jobs sent to each crew lead, with notes | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Reminder texts sent to tomorrow's customers | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Crews and trucks assigned for the next 4 days | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Schedule checked 10 days ahead for days that are too full or too empty | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Before you leave** | | | | | | | |
| Paperwork from every finished job received and checked today | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Payments match the paperwork | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Customer service knows which jobs finished, for tomorrow's review request | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Anything sales got wrong on a job is logged and sent back to sales | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Crews still out know who to call after hours | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |

CARRIED OVER TO NEXT WEEK

# Crew day log

Sheet 2 of 3

One sheet per day. One column per crew. Write the time next to each step as it happens.

DATE

DISPATCHER

BRANCH

| STEP | CREW 1 | CREW 2 | CREW 3 | CREW 4 | CREW 5 |
|---|---|---|---|---|---|
| Crew lead | | | | | |
| Truck | | | | | |
| First call, between 8 and 10 am | | | | | |
| **First job** | | | | | |
| Job number | | | | | |
| Crew lead called the customer on the way | | | | | |
| Arrived | | | | | |
| Estimate matches the job? (yes, or what changed) | | | | | |
| Office call to the customer, mid-move | | | | | |
| Finished | | | | | |
| Paperwork photo received | | | | | |
| Payment collected and matches | | | | | |
| Customer service told the job is done | | | | | |
| **Second job** | | | | | |
| Job number | | | | | |
| Arrival time given to the customer | | | | | |
| Crew lead called the customer on the way | | | | | |
| Arrived | | | | | |
| Estimate matches the job? | | | | | |
| Office call to the customer, mid-move | | | | | |
| Finished | | | | | |
| Paperwork photo received | | | | | |
| Payment collected and matches | | | | | |
| Customer service told the job is done | | | | | |
| **End of day** | | | | | |
| Truck back, or parked where | | | | | |
| Damage or complaint to report | | | | | |

AFTER-HOURS NOTES FOR TOMORROW'S DISPATCHER

# Job notes and move-day calls

Sheet 3 of 3

Pin this next to the dispatch desk.

## 1 Write every job note in the same order

A crew lead reads the note in a truck, on a phone, at 7 am. The same order every time means nothing gets skipped.

| | | |
|---|---|---|
| 1 | **Job number** | The one from the booking, so the crew and the office mean the same job. |
| 2 | **Crew and move type** | 3 movers, local. Or 4 movers, long distance pickup. |
| 3 | **Home and access** | 2 bedroom apartment, 3rd floor, elevator booked 9 to 12, 75 ft carry. |
| 4 | **Packing** | None, partial (say what), or full. |
| 5 | **Bulky and fragile items** | Upright piano, glass table top, 75 inch TV. |
| 6 | **Money** | Flat price, extra charges agreed, balance due and how it is paid. |
| 7 | **Promises** | Anything sales told the customer that the crew must keep. |

```
#4521 | 3 movers, local | 2BR apt, 3rd fl, elevator 9-12, 75 ft carry | partial pack: kitchen only
upright piano, glass table top | flat price $1,450, balance by card | customer asked for shoe covers
```

## 2 Who calls the customer, and when

| WHEN | WHO | WHAT |
|---|---|---|
| Day before | Automatic text | Reminder with the date and arrival window. No reply needed. |
| On the way | Crew lead | Calls with a real arrival time. |
| Mid-move | Office | One call: how is it going, anything we should know? |
| Running late | Dispatcher | Calls before the customer has to call you. |
| Day after | Automatic | Review request, then up to two automatic reminders. Nobody calls to ask for a review. |

## 3 Tell sales what you can take, in plain words

```
Sat: no availability.
Mon: yes. 1 truck, crews of 2 or 3, 3 hour minimum, afternoon start only.
Tue: yes. 2 trucks, any crew size.
```

## 4 Paperwork is checked the day the job is done

- The crew lead sends a photo of the signed paperwork before leaving the customer.
- Someone in the office reads it the same day: times, signatures, charges, payment.
- If it is wrong, the crew lead hears about it that day, with the mistake marked.
- The corrected copy comes back the same day. A mistake found next week is a refund.