MISSED-CALL TEXT-BACK SETUP CHECKLIST

A one-page build list for any CRM or phone system that can send an automatic text after a missed call.

1. Before you build

- [ ] Confirm the business number can send texts (some landlines and VoIP numbers can't, so check with the phone or CRM provider).
- [ ] Check texting rules for your country. In the US, business texting usually needs A2P 10DLC brand and campaign registration before messages deliver reliably.
- [ ] Agree with the owner on business hours, who replies to texts, and how fast.
- [ ] Get the owner's sign-off on the exact message wording before anything goes live.

2. Write the message

- [ ] Name the business so the caller knows who's texting.
- [ ] Keep it short: say sorry for missing them and ask one easy question.
- [ ] Use a first-name field only with a fallback (for example "there") for unknown callers.
- [ ] Add opt-out wording such as "Reply STOP to opt out" if your provider or local rules require it.

> Example: "Hi {first name|there}, this is [Business]. Sorry we missed your call! How can we help? Reply here and we'll get right back to you."

3. Build the workflow

- [ ] Trigger: missed or unanswered inbound call (in HighLevel and similar CRMs this is a "call status" or "missed call" trigger).
- [ ] Filter out calls the team answered, voicemails already handled, and internal or spam numbers if the tool allows it.
- [ ] Action: send the SMS from the same business number the customer called.
- [ ] Optional: a short wait, then notify the owner or team (email, app alert or task) with the caller's number.
- [ ] Optional: a different message outside business hours that says when someone will reply.
- [ ] Tag or note the contact so you can see who came in through text-back.

4. Test before launch

- [ ] Call from a phone that isn't saved as a contact, let it ring out, and confirm the text arrives.
- [ ] Repeat from a saved contact to check the first-name field.
- [ ] Reply to the text and confirm the reply lands where the team will see it.
- [ ] Answer a test call and confirm no text is sent.
- [ ] Text STOP and confirm the number is opted out.

5. After launch

- [ ] Check the first week of messages with the owner and adjust the wording if needed.
- [ ] Watch for delivery failures or carrier filtering in the CRM's logs.
- [ ] Review once a month: are replies answered fast? Are any callers falling through?

Free from AI Service Playbook (aiserviceplaybook.com). Tool menus and labels change, so check your CRM's current help pages. This checklist is general guidance, not legal advice, and it's not a promise of results.