RENTAL COUNTER · OUTFITTER SHIFT

Callback handover sheet

Blank sheet · Write in roles, not staff names.

Before the shift, agree who checks missed calls and who takes over. Fill this in together and keep it where staff can find it.

Shift / date: _____ Applies until: _____

1. Own the callback check

Responsible staff role

Backup staff role

When / how the backup takes over

2. Agree when to review

Choose check times the team can keep, including after-hours messages.

Review time(s) / trigger and next check after closing

Where the approved staff-only callback queue is kept

3. Find approved routine answers

Use current hours, pickup / meeting instructions and return rules.

Where the approved reference is kept / role that updates it

Where staff must check availability before confirming

4. Route exceptions to a person

List requests staff cannot approve and the role authorized to decide.

Exception → decision role (and backup)

If neither is reachable, staff's agreed next step

> Keep caller details in your approved staff-only queue, not on this sheet. Follow your existing emergency procedure for urgent safety concerns. Don't promise an exception or booking before an authorized person confirms.

At handover, check together

- ☐ Next shift accepts open items in the staff-only queue.
- ☐ Owner / backup, next review and current answer source are clear.

Free help from Growth Ops Agency · Utah call-handling guide · Missed-call self-check

Request a Free Missed-Call Revenue Audit — optional, separate contact form.

Questions: growth-ops-agency@brainer.one

RENTAL COUNTER · OUTFITTER SHIFT

Callback handover sheet

Completed example · Fictional paddleboard rental shift.

Use this as a model, then agree your own roles and check times. These are example instructions, not a customer result or a service commitment.

Shift / date: Saturday counter shift

Applies until: Sunday opening handover

1. Own the callback check

Responsible staff role

Counter lead

Backup staff role

Duty manager

Before the lead leaves the counter, the duty manager accepts the callback check. If the manager is away, the operator on duty takes over.

2. Agree when to review

Review at opening, 12:00 and 16:30 handover. Check after-hours messages at 08:00 Sunday opening.

Use the staff-only callback queue on the counter tablet. Each open item has one role responsible, a next action and a review time. Mark replied only after the agreed reply step.

3. Find approved routine answers

“Counter answers — current season” in the green counter binder. The duty manager updates hours, pickup instructions and standard returns before opening.

Check the live rental inventory before confirming boards or dates. A requested rental stays a request until staff confirms it.

4. Route exceptions to a person

Late return or refund → duty manager; backup: operator on duty.

Weather, route suitability or safety concern → trip lead; backup: operator on duty.

If neither decision role is reachable, leave the request waiting for staff in the approved queue for the next review. Do not approve the exception or give safety advice outside the agreed instructions.

> Keep caller details in your approved staff-only queue, not on this sheet. Follow your existing emergency procedure for urgent safety concerns. Don’t promise an exception or booking before an authorized person confirms.

At handover, check together

- ✓ Duty manager accepts open items at 16:30.
- ✓ Sunday opening counter lead checks again at 08:00.
- ✓ Current binder and decision-role backup are confirmed.

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