The VirtualPBX Call Flow Builder

Here's why you should map your call flow.

Designing your call flow is the first step to building a natural, repeatable caller experience. Many businesses never take the time to map this out—you're giving yourself a huge head start for a better customer experience.

Your Worksheet, Your Blueprint

This worksheet is your space to sketch, plan, and fine-tune how callers move through your VirtualPBX system:

- **During business hours**
- **After hours**
- **Seasonal or holiday periods**

Think of it as your blueprint for a smoother, more predictable caller experience.

Put It To Use

- **See your entire call path at a glance** — from first ring to final destination
- **Collaborate with your team** — sales, support, and operations can all weigh in
- **Give your VirtualPBX specialist a clear roadmap** — for building or refining your system

Next Steps

Once your map is ready, share it with your onboarding specialist. They'll turn your plan into a clean, reliable call structure based on your teams, your hours, and how you want customers to reach you.

Want to try multiple versions or experiment with different ideas? This template is yours—reprint as needed. You'll also find a sample layout on page 3 to spark inspiration.

Let's Build Something Great

You're setting the stage for a caller experience everyone can be proud of—and we're excited to help you bring it to life.

How do you want callers to experience your business?

Think about what your customers want to hear when they call. Friendly, clear, and helpful messages make a big difference. This is your chance to demonstrate your company brand for thoughtful first impressions. Use bullet points to know what you need to include before you frame it.

Greetings

Your greetings are your first impression. They don't have to feel boxed and transactional. Keep your brand's tone and personality in mind.

MAIN

Think → hours, location, etc.

AFTER HOURS

Think → hours, emergency needs, etc.

SEASONAL/HOLIDAY

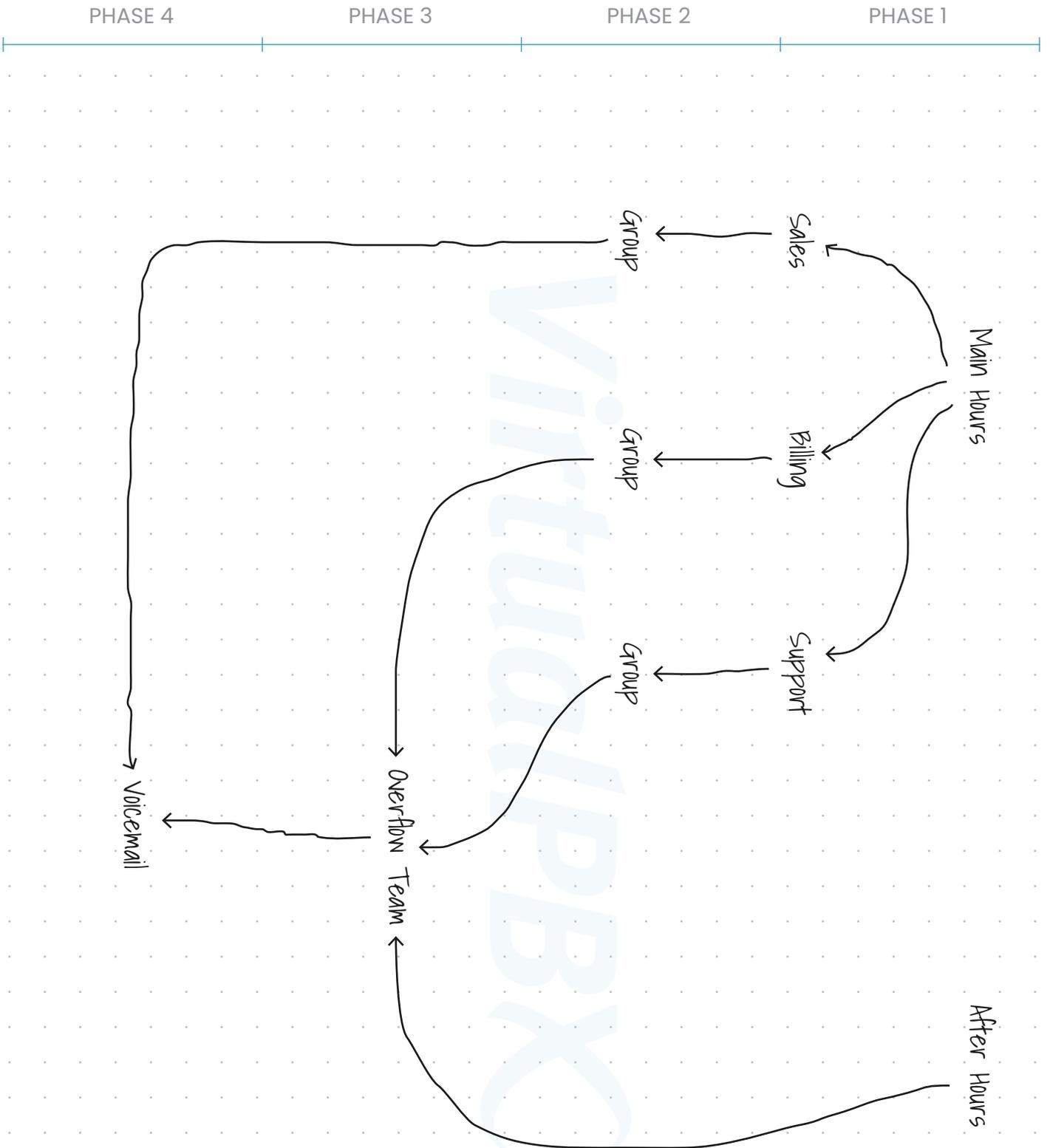*Think → holiday hours, closures, etc.*

Menu Option Planning

What options do your callers need? What makes sense for your business and your brand? Feel free to write the prompt (1, 2, 3...) in the boxes.

- ☐ Appointments
- ☐ Billing
- ☐ Call Back Requests
- ☐ Closures
- ☐ Emergencies
- ☐ Event Info
- ☐ FAQ / Common Questions
- ☐ Gift Cards
- ☐ Hours / Holiday Hours

- ☐ Location & Directions
- ☐ Loyalty / Rewards Program
- ☐ Main Menu / Operator / Front Desk
- ☐ Orders
- ☐ Promotions / Specials
- ☐ Sales
- ☐ Scheduling
- ☐ Service Requests
- ☐ Staff Directory

- ☐ Support / Help Desk
- ☐ Voicemail
- ☐
- ☐
- ☐
- ☐
- ☐
- ☐
- ☐

After Hours & Holiday Routing Adjustments

Calls don't stop when the lights go out. How do you want your system to receive callers when there's no one to send them to? Main voicemail? Forward to an after hours line? Send a text? Simplify the menu?

INCOMING CALL

Main Hours → Sales → Group
Main Hours → Billing → Group
Main Hours → Support → Group

Group (Sales) → Voicemail
Group (Billing) → Overflow Team → Voicemail
Group (Support) → Overflow Team

After Hours → Overflow Team

INCOMING CALL