Dealer checklist for a clean correction routine

Build a Clean Contact-Info Correction Routine From Voice Agent Calls

Owner: _____ Date: _____

- [ ] Review the saved transcript or lead notes before changing any contact field, and confirm the correction belongs to the same customer record.
- [ ] Write a short source note in the CRM that explains where the new number or contact detail came from and why the team accepted it.
- [ ] Keep prior contact history visible where your CRM allows it so staff can trace what changed without deleting useful context.
- [ ] Use the corrected contact detail for the next callback, reminder, or outbound follow-up tied to that record, and do not restart the lead as a new customer unless identity truly differs.
- [ ] Have a manager or BDC lead spot-check a sample of corrected records regularly to make sure duplicates, mismatches, and missing notes are being caught early.

Notes and next steps

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Adapt this checklist to your dealership’s process.

Read the article on Goxee