Manager checklist before Saturday opens

Build a Saturday Phone Route Before the Showroom Gets Busy

Owner: _____ Date: _____

- [ ] Verify the main call paths for sales, service, and manager requests, and make sure each one has a named primary owner and backup.
- [ ] Confirm which advertising numbers are tied to each channel so staff can recognize the likely purpose of the call quickly.
- [ ] Review the ringing order and extensions so the first answer goes to the right desk when possible, not just the nearest desk.
- [ ] Decide how returning customers should be handled and whether Auto Route should reconnect them with their assigned salesperson.
- [ ] Remind the team how to transfer, add a coworker, or send a text during a live call so the handoff stays short and clear.

Notes and next steps

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Adapt this checklist to your dealership’s process.

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