Dealer checklist for a reminder flow that preserves context

Build an Appointment Reminder Call Flow That Does Not Restart the Sale

Owner: _____ Date: _____

- [ ] Verify that the reminder line or extension is assigned to Voice Agent and tied to the correct stored appointment source.
- [ ] Set the configured lead time so the reminder reaches shoppers close enough to the visit to be useful, but not so late that staff cannot react to a change.
- [ ] Limit the conversation to readiness, timing, and visit details; remove broad qualification prompts that belong in a first-touch sales call.
- [ ] Define which change requests must be sent to staff for review, including reschedules, representative changes, and callback requests.
- [ ] Review saved transcripts and lead notes regularly to confirm the reminder stays on task and gives staff a clean handoff.
- [ ] Train staff to treat reminder notes as appointment support, not as a replacement for their own follow-up when the customer changes the plan.

Notes and next steps

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Adapt this checklist to your dealership’s process.

Read the article on Goxee