# Practical checklist for managers

Goxee vs. Impel Voice AI for Trade-In Callback Follow-Up

Owner: _____ Date: _____

- [ ] Verify that the configured phone line or extension routes missed sales calls to Voice Agent when staff cannot answer.
- [ ] Confirm the conversation objective for this scenario, including the questions, topics, and next-step rules your team wants captured.
- [ ] Review a saved transcript example to make sure vehicle interest, trade-in notes, and callback timing are easy for staff to read.
- [ ] Check that customer-requested callback settings follow your store’s calling permissions, eligibility, and scheduling rules.
- [ ] Make sure lead notes can be reviewed by salespeople and managers in the CRM before the follow-up call is made.

Notes and next steps

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Adapt this checklist to your dealership’s process.

Read the article on Goxee