Five-call audit checklist

How Dealerships Can Capture More Sales Leads from Phone Calls

Owner: _____ Date: _____

- [ ] Listen to five recent inbound calls and verify whether the rep identified the shopper’s need before talking about the vehicle in detail.
- [ ] Check whether each call ended with a confirmed name, phone number, or preferred callback method that the dealership can actually use.
- [ ] Review whether ownership was clear after the call, including whether Auto Assign or a named salesperson should handle the lead next.
- [ ] Confirm that transfers, added coworkers, or texts during the call preserved context instead of making the customer repeat information.
- [ ] Verify that each call produced a specific next step, such as an appointment, callback time, or follow-up message, rather than a vague promise to stay in touch.

Notes and next steps

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Adapt this checklist to your dealership’s process.

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