Manager-ready checklist for stop requests

How to Stop Automated Follow-Up Without Breaking the Next Conversation

Owner: _____ Date: _____

- [ ] Confirm the customer’s exact request before changing any follow-up status, and note whether it applies to all outreach or only one channel.
- [ ] Verify that the request is tied to the correct customer record, then record the wording clearly so the team can recognize it later.
- [ ] Turn off the automated outreach that the customer asked to stop, and avoid placing the record back into active nurture by mistake.
- [ ] Save concise notes about the concern, vehicle interest, and any callback preference so an inbound call can start with context.
- [ ] Review the record before any new campaign or task list is launched to make sure the stop request is still respected.
- [ ] Train sales, BDC, and managers to separate stopped automation from permitted inbound help, and to avoid promising future contact the customer did not request.

Notes and next steps

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Adapt this checklist to your dealership’s process.

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