Manager checklist for cleaner live transfers

Prepare a Clean Live Transfer When a Shopper Asks for a Specific Person

Owner: _____ Date: _____

- [ ] Define which requests should go to a named person, which should go to a department, and which should be handled as a callback instead of a live transfer.
- [ ] Set the sales objective for these calls so the conversation gathers the right details without drifting into unrelated topics.
- [ ] Review saved transcripts and lead notes regularly to confirm the reason for the call is captured in plain language.
- [ ] Verify that staff know where to look for the notes before calling the customer back or joining the transfer.
- [ ] Confirm that callback timing, live handoff, and voicemail follow-up rules match the dealership’s current calling permissions and hours.
- [ ] Audit a few example calls each week to see whether the next human conversation starts with useful context or with a reset.

Notes and next steps

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Adapt this checklist to your dealership’s process.

Read the article on Goxee