Manager checklist for reviewing marketplace calls

Review Marketplace Calls by the Question, Not Just the Ring

Owner: _____ Date: _____

- [ ] Confirm which advertising source the call came from, and check that the number is assigned consistently enough to review the source accurately.
- [ ] Listen for the shopper’s first real question before judging the call, and write down whether the call was about a specific vehicle, a comparison, or general availability.
- [ ] Verify who answered, which extension or greeting the caller reached, and whether the ringing order helped the call reach the right person.
- [ ] Check the recording or transcript in the CRM for the next step, including whether the conversation ended with a clear handoff, callback plan, or transfer.
- [ ] Classify the call as a useful lead, weak lead, or missed opportunity based on the conversation and follow-up, not just on whether it rang.
- [ ] Share one coaching point with the team so the review routine improves how future marketplace calls are handled.

Notes and next steps

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Adapt this checklist to your dealership’s process.

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