Practical checklist for dealership teams

Send the Right Text Before You End the Call

Owner: _____ Date: _____

- [ ] Confirm that answered inbound calls are routed to the right salesperson or team before the conversation starts.
- [ ] Decide which single text options are approved for live calls: vehicle link, finance application, or next-step note.
- [ ] Train salespeople to send the text while the shopper is still on the phone, not after hanging up.
- [ ] Require a brief confirmation step so the customer acknowledges receiving the text before the call ends.
- [ ] Review recordings, transcripts, and CRM notes regularly to check that the next step is clear and consistent.
- [ ] Use call ownership and routing settings so returning shoppers can reconnect with the right person when they call back.

Notes and next steps

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Adapt this checklist to your dealership's process.

Read the article on Goxee