Manager checklist for a usable voicemail-and-text workflow

Turn a Missed Sales Call Into a Usable Voicemail-and-Text Follow-Up

Owner: _____ Date: _____

- [ ] Confirm which dealership line or extension should route to Voice Agent after hours or during peak traffic, and verify the coverage hours match your real call patterns.
- [ ] Choose one primary objective for the line, such as qualifying buyers or arranging visits, and list the essential questions that must be captured every time.
- [ ] Review whether voicemail, contextual text, or both should be used for unanswered calls, and verify the dealership’s contact priority rules before going live.
- [ ] Ask sales staff to review saved transcripts and notes daily so they can confirm vehicle interest, callback timing, and any customer concerns worth addressing first.
- [ ] Verify that any live handoff, callback request, or spouse/co-signer invitation is limited to the situations your team actually wants to support.
- [ ] Check that CRM notes are clear enough for a next-day call, and update the workflow if the transcript does not consistently produce a usable handoff.

Notes and next steps

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Adapt this checklist to your dealership’s process.

Read the article on Goxee