Manager-ready checklist

Use Advantage to Gather Missing Deal Documents Without Restarting the Conversation

Owner: _____ Date: _____

- [ ] Verify the current deal stage before sending any follow-up, so the message matches what the shopper already shared.
- [ ] List only the next missing document or answer, and avoid asking for unrelated details in the same message.
- [ ] Assign each automation to a clear purpose, such as paystub follow-up, trade-in detail collection, or appointment confirmation.
- [ ] Make sure a salesperson approves appointment requests before any confirmation is sent to the customer.
- [ ] Route completed responses to the right staff member for review, and define when sales versus finance should handle the next step.
- [ ] Review active message templates regularly so they still sound like the same conversation instead of a restarted lead thread.

Notes and next steps

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Adapt this checklist to your dealership’s process.

Read the article on Goxee