Practical checklist for managers

Use Auto Assign to Keep Answered Calls from Becoming Ownerless Leads

Owner: _____ Date: _____

- [ ] Write a one-sentence rule for when an answered call becomes an owned CRM lead, and make sure every team member can repeat it.
- [ ] List which roles should receive the lead next after specific call types, such as product questions, finance questions, or management escalations.
- [ ] Verify that staff know how to transfer a call, add a coworker, or send a text during the conversation when the workflow requires it.
- [ ] Review a small sample of call recordings and transcripts each week to confirm the assigned owner matches the person who handled the call.
- [ ] Check that returning customers are being connected to the assigned salesperson only when that matches the dealership’s documented process.
- [ ] Update the handoff rule when the review shows repeated confusion, instead of letting the same ownership error continue.

Notes and next steps

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Adapt this checklist to your dealership’s process.

Read the article on Goxee