Manager checklist for requested AI callbacks

Use Requested AI Callbacks to Keep a Late-Stage Buyer Conversation Alive

Owner: _____ Date: _____

- [ ] Verify the original lead note or transcript so the callback matches the customer's stated reason for wanting to reconnect.
- [ ] Confirm the requested timing and any applicable calling permissions before the callback is scheduled.
- [ ] Choose one primary objective for the callback, such as qualifying the buyer, setting a visit, or addressing a specific concern.
- [ ] Decide in advance which situations should trigger a human handoff, including requests for a salesperson, department, or live walkaround.
- [ ] Review the saved transcript after the call to confirm that the concern, vehicle interest, and next step were recorded clearly.
- [ ] Check whether the customer asked to stop automated follow-up and make sure outreach settings reflect that request.

Notes and next steps

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Adapt this checklist to your dealership's process.

Read the article on Goxee