Manager checklist

Use Voice Agent to Pre-Qualify Calls Before the Sales Team Picks Up

Owner: _____ Date: _____

- [ ] Choose one primary sales objective for the line or extension and confirm it matches the type of calls that most often go unanswered.
- [ ] List the essential questions the agent should ask, and make sure each one helps a salesperson decide the next step.
- [ ] Define optional topics so the conversation can stay natural without drifting away from the dealership’s goal.
- [ ] Set clear preferred next steps for common situations, such as appointment request, live transfer, callback, or vehicle search.
- [ ] Review a few saved transcripts after launch to confirm the notes are readable, relevant, and routed to the right team members.
- [ ] Decide who will verify contact details, vehicle interest, and any finance-related discussion before staff act on the lead.

Notes and next steps

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Adapt this checklist to your dealership’s process.

Read the article on Goxee