Practical checklist for managers

Use Voice Agent to Recognize Returning Callers Without Starting Over

Owner: _____ Date: _____

- [ ] Confirm which dealership line or extension should route returning callers to Voice Agent after hours or when staff are unavailable.
- [ ] Review the saved objective settings and make sure they match the reason customers usually call back, such as scheduling, vehicle fit, or concern resolution.
- [ ] Verify that essential questions and preferred next steps are written clearly so the agent can continue the conversation without guessing.
- [ ] Check that staff know where to find saved transcripts, lead notes, and callback requests after the call ends.
- [ ] Decide in advance which situations should trigger a live handoff to a salesperson, manager, or department representative.
- [ ] Make sure the team understands that verified identity and approved permissions govern what context can be reused on a returning call.

Notes and next steps

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Adapt this checklist to your dealership’s process.

Read the article on Goxee