Manager checklist for a clean callback workflow

Use Voice Agent to Route New Inquiries Into a Clean Callback Workflow

Owner: _____ Date: _____

- [ ] Assign Voice Agent only to the line or extension that should capture missed new inquiries, and verify which calls are routed there after hours.
- [ ] Choose one primary objective for that line, then list the essential questions and the preferred next step so the conversation stays focused.
- [ ] Review a sample of saved transcripts each week to confirm that vehicle interest, customer concerns, and callback requests are being captured clearly.
- [ ] Confirm who reviews the notes in the morning and how staff should respond when the customer requested a specific salesperson or department.
- [ ] Test the fallback path for unavailable handoffs so the dealership still preserves context and schedules the next human contact cleanly.
- [ ] Verify that outbound follow-up rules, voicemail behavior, text follow-up, and stop-request handling match dealership policy and the applicable permissions.

Notes and next steps

_____

_____

Adapt this checklist to your dealership’s process.

Read the article on Goxee