Manager checklist for a pre-qualification script

Build a pre-qualification script for your busiest dealership line

Owner: _____ Date: _____

- [ ] Set one clear sales objective for the line and write it at the top of the script so staff know what the call must accomplish.
- [ ] Limit the script to the essential questions that change the next step, such as vehicle interest, timing, and preferred follow-up.
- [ ] Confirm that the script tells Voice Agent when to save a callback request, a visit request, or a live-handoff request.
- [ ] Review sample transcripts in the CRM to verify that salespeople receive the vehicle, concern, and next step without extra back-and-forth.
- [ ] Check that the script stays within configured calling hours, permissions, and eligibility rules for callbacks and transfers.
- [ ] Update the script when staff see repeated confusion, long pauses, or vague handoffs in the saved notes.

Notes and next steps

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Adapt this checklist to your dealership’s process.

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