Printable 5-step checklist

How to choose the right Voice Agent questions for a busy sales line

Owner: _____ Date: _____

- [ ] Define one primary sales objective for the line and confirm it with sales and finance leadership.
- [ ] List the essential questions that identify the vehicle, the reason for calling and the best next step.
- [ ] Separate optional topics from required questions so the call stays short and focused.
- [ ] Choose the default action for missed and after-hours calls, such as callback, live handoff or appointment follow-up.
- [ ] Review saved transcripts and lead notes before the next contact to keep the conversation consistent.

Notes and next steps

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Adapt this checklist to your dealership’s process.

Read the article on Goxee