Practical checklist for managers

How to use requested AI callbacks to keep the conversation moving

Owner: _____ Date: _____

- [ ] Confirm the call was routed to Voice Agent and that the customer asked for a callback rather than a new conversation.
- [ ] Review the saved transcript for the vehicle, concern, preferred timing, and any requested next step.
- [ ] Verify that the callback objective matches the customer’s need, such as arranging a visit or continuing vehicle comparison.
- [ ] Check the customer record for corrected contact details and any supported preferences that should carry forward.
- [ ] Make sure the salesperson or department assigned to the follow-up understands what to continue and what not to repeat.
- [ ] Before the call goes out, confirm that the outreach fits current permissions, calling hours, and scheduling rules.

Notes and next steps

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Adapt this checklist to your dealership’s process.

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