# Printable checklist for managers and sales staff

Keep a finance review conversation on track when the shopper changes direction

Owner: _____ Date: _____

- [ ] Confirm the shopper’s latest question and decide whether the next step is a visit, finance review, or staff handoff.
- [ ] Choose the Advantage objective that matches the current conversation instead of sending a generic follow-up.
- [ ] Verify that the next message asks only for information the dealership actually needs, such as down payment, trade-in details, employment, or paystubs.
- [ ] Check that the salesperson or sales manager has approved the message before it is sent, if that is part of your process.
- [ ] Review the thread after the reply comes back and note whether the customer changed direction again, so the next follow-up stays on topic.

Notes and next steps

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Adapt this checklist to your dealership’s process.

Read the article on Goxee