Manager-ready checklist

Keep a returning caller’s preferences intact before the next answer

Owner: _____ Date: _____

- [ ] Review the saved transcript before any callback and confirm the vehicle, concern, and requested next step.
- [ ] Verify whether the caller asked for a specific salesperson, department, timing, or contact method.
- [ ] Check that any updated phone number or contact preference has been verified before using it.
- [ ] Decide whether the next conversation should stay with sales, move to finance, or become a live handoff.
- [ ] Confirm the line’s objective and questions so the team does not restart the conversation from the beginning.

Notes and next steps

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Adapt this checklist to your dealership’s process.

Read the article on Goxee