Practical transfer handoff checklist

Make a live transfer useful when the right person is unavailable

Owner: _____ Date: _____

- [ ] Confirm the line or extension is routed to Voice Agent and that the transfer target is the correct person or department.
- [ ] Choose one objective for the call flow and keep the questions focused on the reason for contact, vehicle, timing, and next step.
- [ ] Verify the CRM note template captures the key details the next staff member needs before they return the call.
- [ ] Test the supported transfer path for an available salesperson or department and confirm what should happen if no one joins.
- [ ] Review saved transcripts before the follow-up call so the salesperson can continue the same conversation without restarting it.

Notes and next steps

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Adapt this checklist to your dealership’s process.

Read the article on Goxee