Printable checklist for managers

Set up a requested AI callback workflow that hands the conversation back cleanly

Owner: _____ Date: _____

- [ ] Choose one dealership line or extension and verify that calls routed there should be handled by Voice Agent.
- [ ] Set one clear sales objective for the line, then confirm the essential questions and preferred next step.
- [ ] Review a sample callback transcript to verify that the vehicle, concern, and requested timing are saved clearly in CRM notes.
- [ ] Assign the follow-up role before the call returns: salesperson, sales manager, or finance manager as appropriate.
- [ ] Confirm the handoff rule for unavailable staff so the next person can continue from notes instead of restarting the conversation.
- [ ] Check that any verified contact updates are corrected before the return call is placed.

Notes and next steps

_____

_____

Adapt this checklist to your dealership’s process.

Read the article on Goxee