# Manager-ready checklist

Use Voice Agent to capture the next step on unanswered sales calls

Owner: _____ Date: _____

- [ ] Assign Voice Agent to the correct dealership line or extension and verify which routed calls it will answer.
- [ ] Choose one sales objective for the line and confirm the essential questions, optional topics, and preferred next step.
- [ ] Review the voicemail and text rules so the message matches the configured contact priority.
- [ ] Check that saved transcripts and CRM notes will reach the right salesperson or manager for follow-up.
- [ ] Test a customer-requested callback path and a supported live handoff so staff know what happens when someone becomes available.
- [ ] Confirm that contact corrections, appointment reminders, and stop-follow-up requests are handled according to the configured workflow.

Notes and next steps

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Adapt this checklist to your dealership’s process.

Read the article on Goxee