Practical checklist for managers

Use Voice Agent to keep appointment reminders and callback requests organized

Owner: _____ Date: _____

- [ ] Assign Voice Agent to one dealership line or extension and verify that calls route to it when staff are unavailable.
- [ ] Choose one sales objective for the line so the conversation stays focused on reminders, callbacks, or the next step you want.
- [ ] Decide which note fields the team should read first, such as vehicle interest, requested callback time, concern, and preferred representative.
- [ ] Review a sample transcript with the sales manager and confirm that the CRM note is clear enough for a salesperson to act on.
- [ ] Check that appointment reminders use the saved appointment and lead time, not a new qualification script.
- [ ] Confirm how the team will handle a customer-requested callback when the preferred person is unavailable, including who should review the handoff.

Notes and next steps

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Adapt this checklist to your dealership’s process.

Read the article on Goxee