# Practical checklist for managers

Use Voice Agent to move a phone shopper into a live video call with the right decision-maker

Owner: _____ Date: _____

- [ ] Assign Voice Agent to the dealership line or extension that most often receives first-contact calls.
- [ ] Set one sales objective for the line so the conversation stays focused on the next step you want.
- [ ] Verify the transcript captures the vehicle, the reason for the call, and who needs to join the discussion.
- [ ] Confirm which salesperson, sales manager, or department should receive a requested live handoff.
- [ ] Review saved notes before the next callback so staff can continue without restarting the conversation.
- [ ] Check that the customer’s requested next step is realistic under current permissions, calling hours, and availability.

Notes and next steps

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Adapt this checklist to your dealership’s process.

Read the article on Goxee