Practical checklist for managers

Use Voice Agent to turn new inquiries into a clear next step

Owner: _____ Date: _____

- [ ] Choose one objective for the line and verify the questions support that objective, not a broad script.
- [ ] Check that the assigned number or extension routes missed calls to Voice Agent when staff cannot answer.
- [ ] Review saved transcripts daily and confirm the vehicle, caller reason, and next step were captured clearly.
- [ ] Assign callbacks based on the transcript, then verify whether the follow-up should be a salesperson, manager, or department handoff.
- [ ] Confirm any requested contact timing, live transfer request, or video walkaround request before starting the next action.

Notes and next steps

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Adapt this checklist to your dealership’s process.

Read the article on Goxee