

Receptionist Phone Call Checklist



Name:

Date/Time of Call:

Best Practices	Achieved?			Agent Action
	Yes	No	N/A	
Positive First Impression				
Thanked customer for calling (attitude of gratitude!)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Provided name of dealership	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Offered Assistance ("What information can I get for you?" or "How may I direct your call?")	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Spoke clearly and with a good pace	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Transparency & Rapport Building				
Listened to customer needs and repeated back ("I'd be happy to connect you to Sales!")	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Asked clarifying questions when necessary ("Were you calling to make an appointment?" or "Were you looking for New or Pre-owned vehicles?")	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Displayed empathy when necessary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Apologized when necessary followed by a promise to serve	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Obtained complete information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Promised to deliver message and informed customer on how the message would be passed on to the intended party (handwritten, text, email)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Displayed knowledge of current dealership offers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Displayed knowledge of dealership benefits statement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Offered alternative assistance, verifying someone else who can help	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Transfer Process				
Performed a warm transfer (confirming availability of Agent and confirming with customer who they will be connected to)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Placed customer on hold for no more than 30 seconds without checking in	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Only transferred to voicemail at the caller's request	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Positive Lasting Impressions				
Used positive phrases (e.g. "My pleasure")	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Thanked the customer at the end of warm transfer process or when taking a message	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	