

THE PHONE TO APPOINTMENT LEAK CHECKLIST

A fifteen-call inspection that shows why real buyers hang up without a reason to visit.

THE LEAK

The Phone to Appointment Leak Checklist

The phone rings. The customer asks a real buying question. The salesperson answers it, sounds friendly, and hangs up without asking for a firm appointment. Everybody counts the call as handled. The dealership counts the missing customer as bad traffic.

What good looks like

- The salesperson gives a clear name and dealership identification.
- The opening earns permission to ask questions.
- The salesperson answers the customer's actual question before redirecting.
- At least two discovery questions uncover motive and timing.
- The salesperson gives a reason to visit that matters to this customer.
- Two specific appointment times are offered.
- Contact information and appointment details are repeated back.
- A confirmation message is sent before the call is closed.

USE THIS LANGUAGE

Opening: "Thanks for calling _____. This is _____. I can help with that. Before I answer, what caught your attention about this vehicle?"

Appointment: "I have it available to show at 2:15 or 4:40. Which time is easier for you?"

Soft resistance: "No problem. If I can answer the last question stopping you from choosing a time, what would it be?"

Language is a tool, not a costume

Do not memorize these words until they sound dead. Understand the job each line performs. Keep the intent, use your natural voice, and listen to the answer. A script that prevents listening is not a script. It is a hiding place.

FIELD INSPECTION

OK	STANDARD	OWNER
☐	The salesperson gives a clear name and dealership identification.	_____
☐	The opening earns permission to ask questions.	_____
☐	The salesperson answers the customer's actual question before redirecting.	_____
☐	At least two discovery questions uncover motive and timing.	_____
☐	The salesperson gives a reason to visit that matters to this customer.	_____
☐	Two specific appointment times are offered.	_____
☐	Contact information and appointment details are repeated back.	_____
☐	A confirmation message is sent before the call is closed.	_____

Write the three examples you will inspect

1. _____

2. _____

3. _____

THE SCOREBOARD

- Calls from real buyers
- Appointment asked rate
- Appointment set rate
- Show rate
- Sold rate by call source

The numbers do not coach the team by themselves. They tell the manager where to inspect. Pull the work behind the number, identify the repeatable behavior, and coach that behavior while the example is still fresh.

Your twenty-four-hour move

Pull fifteen calls today. Grade what happened inside the call, not whether the employee sounded nice.

FOUND ONE LEAK

Now find the rest of them

This guide isolates one breakdown. Your CRM, calls, lead handling, handoffs, and manager behavior operate as one system. Fixing the loudest symptom while the next leak stays hidden is how dealerships stay busy without getting better.

Request a free CRM audit at ingraminteractive.com/request-a-diagnostic. We will look at the real workflow, identify where sold units are escaping, and tell you what deserves action first.

Ingram Interactive installs dealership process for internet leads, inbound phone opportunities, floor traffic, manager turn-overs, follow-up discipline, and staff accountability.