Automotive Dealerships Evaluation Checklist

Use the same requirements with each provider. Check an item only after you have evidence, a named owner and an agreed next step.

Business / locations: _____ **Date:** _____

Provider / reviewer: _____

☐ **1. Map department call paths**

Trace sales, service, parts and billing calls. Test transfers, advisor availability, overflow and after-hours routing before selecting a platform.

☐ **2. Evaluate calling and messaging**

Confirm queues, callback workflows, recording and mobile access. Review customer texting consent, opt-outs, record access and follow-up responsibility.

☐ **3. Verify DMS and CRM integrations**

Confirm exact software versions, supported workflows, data fields, permissions and connector fees. Name the owner for mapping and ongoing maintenance.

☐ **4. Check service-desk connectivity**

Document scheduling, advisor and service-system dependencies. Verify primary internet, network equipment and support boundaries at each dealership.

Evidence / open questions: _____

_____

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☐ 5. Plan for multiple locations

Confirm store-specific business hours, numbers, caller ID and queues. Decide who manages group standards, local changes and new-store additions.

☐ 6. Test outages and staff fallback

Try backup internet, alternate call routes and power arrangements. Record how customers reach service staff and who coordinates recovery during an outage.

☐ 7. Compare rollout and complete costs

Include users, numbers, equipment, licenses, connectors, installation, training and support. Agree on number-port dates, cutover tests and exit terms.

☐ 8. Choose and assign ongoing support

Use the same customer scenarios with each provider. Document acceptance results, staff training, escalation contacts and support ownership after cutover.

Decision / next action: _____

Owner: _____ **Target date:** _____

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Schedule a free technology assessment

Consultation: www.usacommunications.us/schedule-a-meeting/

Planning worksheet. Each supplier's scope must be verified in writing. Use qualified teams to review applicable security, legal and operational requirements.