

AI receptionist buyer checklist for car dealerships

22 questions to ask any AI phone agent before you sign. Tick each question once the vendor has answered it, and note the answer on the line. Ask for the answers in writing.

1 After-hours and overflow coverage

☐ **Which hours and days does it answer, including nights, weekends and holidays?**

Why it matters: A call that reaches voicemail after close can be a lost appointment. Coverage only counts when it is live while your team is not.

☐ **Does it answer on the first ring, or only after your phones ring out? Who controls that setting?**

Why it matters: Overflow set-ups differ. Ask how many rings pass before it picks up, and whether you can change that yourself.

☐ **Can it take many calls at the same time, such as Monday morning or the day after a recall notice?**

Why it matters: If callers queue behind one line, you have rebuilt the missed call you were trying to remove.

Cleo example: Stevens Creek Subaru, September 21 to October 20, 2026. Cleo answered 1,678 calls, and 30 of the appointments it booked were made while the service department was closed.

2 Booking into your service scheduler

☐ **Which scheduler does it book into, and does it create the appointment or only leave staff a message?**

Why it matters: A message still needs a callback. Only a booked appointment removes the work.

☐ **Does it read the open times from your scheduler before it offers one?**

Why it matters: Offering a time that does not exist creates double-bookings and apology calls.

☐ **Does it tell the caller they are booked only after the scheduler accepts the booking?**

Why it matters: A caller told “you’re all set” after a failed booking arrives to find no slot.

☐ **Can it find the caller and their vehicle, and match the request to a service your scheduler lists?**

Why it matters: Booking in free text makes your advisors re-key the work and guess the service.

☐ **Can it move or cancel an existing appointment, or only create new ones?**

Why it matters: Customers also call to change appointments. Ask which changes it can finish and which it hands to staff.

Cleo example: El Cerrito Honda, an Xtime store, rolling 30 days captured September 26, 2026. Cleo booked service appointments directly into Xtime: 112 appointments in 30 days, 34 of them while the dealership was closed.

3 Handoff to staff and callbacks

☐ **When a person is needed, can it transfer the call live to the right department and number?**

Why it matters: A caller who asks for a manager, parts or sales should never meet a dead end.

☐ **If nobody answers or no time is open, does it create a callback task with the details it collected?**

Why it matters: Your team should not have to ask the caller to repeat everything.

☐ **Can you set which calls go to people, by department, topic or hours?**

Why it matters: The right rules differ for service, sales and parts, and they change with staffing.

Cleo example: if the scheduler has no suitable time or a booking fails, Cleo never says an appointment is confirmed. It sends the service team a callback request with the details it collected, or transfers to a person you configure.

4 Call recordings and reporting

☐ **Can you listen to the recording and read the transcript of every call?**

Why it matters: You cannot coach, fix or settle a complaint about a call you cannot hear.

☐ **Does reporting keep answered calls, booked appointments, transfers and callbacks separate, with dates?**

Why it matters: Blended counts overstate results. Separate outcomes show what calls became.

☐ **Does it report appointments booked, or appointments completed and revenue? How is each defined?**

Why it matters: A booked appointment is not a completed visit. Ask which one the number means.

Cleo example: the Stevens Creek Subaru figures count booking-outcome calls from Cleo's call log. A booking-outcome call is not a completed appointment and not revenue.

5 Setup time

☐ **How long from signing to answering live calls, and what do you need to provide?**

Why it matters: A slow launch delays the benefit. Ask for a dated plan, not a range.

- ☐ **Who connects the scheduler and sets service rules, hours and escalation numbers, and who changes them later?**

Why it matters: Rules change with staffing and promotions. If every change is a ticket, calls drift out of date.

Cleo example: Cleo can be live in under 7 days. Before launch you confirm the scheduler connection, service rules, opening hours and escalation destinations.

6 Pricing model

- ☐ **How is the price built: a flat monthly fee, per minute, per call, per booked appointment, or a mix?**

Why it matters: Each structure behaves differently when call volume swings.

- ☐ **What happens above the included volume, and is there a setup fee or a minimum term?**

Why it matters: The headline price may not be the whole bill in a busy month.

- ☐ **Is the price per rooftop or for the group, and what does it include, such as the scheduler connection, support and changes?**

Why it matters: Two quotes are only comparable once they cover the same things.

Cleo example: this page states no Cleo price. The cost page shows how to work out what a booked appointment is worth to your store.

7 Data and privacy

- ☐ **How are recordings and transcripts stored, who can access them, and how long are they kept?**

Why it matters: Calls hold names, numbers, vehicles and sometimes payment details.

- ☐ **How does it handle caller notice and consent for recorded calls in your state?**

Why it matters: Recording rules differ by state. Confirm the vendor's approach with your own counsel.

- ☐ **Can you export your call data, and what happens to it if you leave?**

Why it matters: You should know the way out before you sign.

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