

SAMPLE ASSESSMENT • SEPTEMBER 2026

# You earned the contact. What happens next?

ABC Motors | An outside-in view of dealership communication

## FLOW

### ASSESSMENT

Find the friction between customer intent  
and a clear next step.

#### Prepared for the dealer GM

A concise view of where calls, texts, forms and chat lose momentum - and what to design next.

**Demonstration only.** ABC Motors is an invented dealership. No dealership was contacted. All attempts, times, scores, observations and financial scenarios are synthetic. Public industry research is cited separately.

## 01 / EXECUTIVE SNAPSHOT

# The gap is ownership.

Sample management readout | Decision: prioritize service recovery and visible follow-through.

**48**

synthetic customer journeys

**29 / 48**

reached a clear next step

**19 / 48**

ended without a clear next step

## What this sample reveals

People can respond without resolving the request. The most consequential gaps appear when a customer moves between departments, channels or business hours.

## First management move

Give service inquiries a named owner and backup. Make failed transfers create a callback task, with a deadline the customer can see.

## What already works

Sales has a clear next step in 9 of 12 sample journeys. Parts resolves 4 of 6. Preserve effective responses and use them in coaching.

60% clear next step (29/48, rounded). This is a synthetic diagnostic, not a measured store score.

## 02 / WHY THIS MATTERS

# The problem is broader than the phone.

Industry evidence explains what to test. It does not prove what happens at any individual store.

## 16%

### Could not schedule by phone

Pied Piper, September 2026: dealership callers unable to schedule service. Includes hold, routing, voicemail and information barriers. [1]

## 58%

### Reached a person

Invoca, July 2026: all automotive calls in its customer dataset. This is not a dealer-only rate or a measure of lost sales. [2]

## 45%

### Dissatisfied with dealer service

Cox Automotive, 2025: dissatisfaction linked primarily to unexpected costs and poor communication, together. [3]

J.D. Power also identifies communication shortfalls as a constraint on satisfaction. [4] Consumer discussions add scenarios worth testing: unanswered questions, ignored channel preferences, and inconsistent repair updates. [5-7]

Consumer posts are anecdotal and unverified. Sources and population limits: page 12.

# Test the journey. Count the outcome.

A proposed fieldwork design, demonstrated here with 48 invented journeys.

## Coverage

24 calls, 8 texts, 10 forms and 6 chats. Sales, service, parts, finance and operator paths; four separate after-hours journeys. Counts are mutually exclusive. After-hours results are not counted again by department.

## Test windows

For a real engagement: distribute attempts across opening, midday, late afternoon and after hours over two business weeks. Use desktop and mobile web paths. Agree hours, languages, locations and safe scenarios before fieldwork.

## A clear next step means...

The question is answered or a specific appointment, action or callback is confirmed, with an accountable person or team and a time expectation. An automated receipt alone does not pass.

## Observation rules

Calls stop at five minutes if unresolved. Digital journeys remain open for one full business day; after-hours clocks begin at the next opening. Capture first meaningful response separately from auto-acknowledgment. These are proposed test rules, not industry standards.

No live testing, interviews or CRM access occurred. Root causes remain hypotheses until validated.

# Where momentum breaks

Clear-next-step successes / synthetic attempts. This is an outcome scorecard, not an industry ranking.

| Path        | Call  | Text | Form | Chat | All   |
|-------------|-------|------|------|------|-------|
| Sales       | 4/5   | 2/3  | 2/3  | 1/1  | 9/12  |
| Service     | 4/8   | 1/2  | 2/4  | 1/2  | 8/16  |
| Parts       | 3/4   | 1/1  | 0/1  | -    | 4/6   |
| Finance     | 2/3   | 0/1  | 1/1  | 1/1  | 4/6   |
| Operator    | 2/4   | -    | -    | -    | 2/4   |
| After hours | -     | 0/1  | 1/1  | 1/2  | 2/4   |
| Total       | 15/24 | 4/8  | 6/10 | 4/6  | 29/48 |

**Interpretation:** Service has the largest count of unresolved journeys (8/16); finance and operator routing also warrant attention. Small cell counts are directional. A dash means untested, not passed.

## 05 / MYSTERY-SHOP EVIDENCE

# Three ways intent gets stranded

Illustrative reconstructions. IDs map to the editable synthetic observation ledger.

**A17 / SERVICE CALL / NO CLEAR NEXT STEP**

|                 |                                                     |
|-----------------|-----------------------------------------------------|
| 00:00           | Caller asks about an existing repair.               |
| 00:42           | Sales answers; sends caller to service.             |
| 02:18           | Advisor mailbox; caller leaves callback details.    |
| +1 business day | No return contact in the sample observation window. |

Friction: the transfer moves the call, but ownership is not visible.

**A11 / SALES FORM / NO CLEAR NEXT STEP**

|                 |                                                           |
|-----------------|-----------------------------------------------------------|
| 10:06           | Customer asks about vehicle availability; requests email. |
| 10:07           | Automated receipt arrives.                                |
| 10:23           | Phone message asks customer to call back.                 |
| +1 business day | Availability question still unanswered by email.          |

Friction: response activity is mistaken for an answered request.

**A45 / AFTER-HOURS TEXT / NO CLEAR NEXT STEP**

|                 |                                                   |
|-----------------|---------------------------------------------------|
| 19:12           | Customer texts a service-booking request.         |
| 19:12           | Auto-reply says the dealership is closed.         |
| Next open +2h   | No stated owner or callback window.               |
| +1 business day | No meaningful response in the observation window. |

Friction: after-hours capture has no visible next-opening recovery.

## 06 / CURRENT-STATE FRICTION MAP

# A reply is not a resolution.

Synthetic service journey | One customer must bridge disconnected steps.

01

**Customer asks**

Call, text, form or chat starts the request.

02

**A channel responds**

A greeting or auto-reply confirms contact, not ownership.

03

**The request moves**

Transfer or forwarded message; context may be lost.

04

**The next team is unavailable**

Mailbox or unowned queue; no promised recovery time.

05

**The customer tries again**

A new contact can look like a new lead while the first stays open.

Design requirement: keep one request, one accountable owner and one visible promise across handoffs.

## 07 / PRIORITY FINDINGS

# Fix recovery first.

Ten sample findings ranked by customer impact and operational leverage; effort must be validated.

**P1 Service transfer recovery**

A17-20: four calls end without a next step. Add warm-transfer fallback. **Owner:** Service manager

**P1 Operator backup**

A43-44: two operator calls fail. Add coverage and overflow owner. **Owner:** GM / reception

**P1 After-hours ownership**

A45, A48: capture does not produce a next step. Assign opening queue. **Owner:** BDC lead

**P1 Service form follow-through**

A25-26: no clear next step. Route to a monitored service task list. **Owner:** Service manager

**P2 Channel preference**

A11: email request gets a phone-only follow-up. Carry preference forward. **Owner:** Sales manager

**P2 Finance callback ownership**

A38: text inquiry stalls. Publish an accountable callback process. **Owner:** Finance manager

**P2 Parts form coverage**

A34: form lacks a next step. Route parts separately from sales. **Owner:** Parts manager

**P2 Chat-to-person continuity**

A28: service chat handoff fails. Transfer transcript and intent. **Owner:** Digital lead

**P2 Question-first coaching**

A11: invitation to call substitutes for an answer. Coach relevance. **Owner:** BDC / sales

**P3 Outcome reporting**

Sample reconstruction shows activity alone can hide open requests. **Owner:** GM / operations

Observed symptoms in this fictional scenario are not verified causes or employee performance judgments.

08 / OPPORTUNITY EXPOSURE

# Size the opportunity. Do not invent lost revenue.

Scenario model only | Replace every assumption with validated dealer data before any business case.

**1,000 × 20% = 200**

unique monthly inquiries × unresolved share = exposed inquiries

Illustrative assumptions: 1,000 unique service inquiries per month; 20% unresolved; 50% of recovered inquiries become completed repair orders; \$180 contribution per completed order before program cost. The 20% is not extrapolated from this sample.

| Recovery of exposed inquiries | Completed orders | Contribution / mo. |
|-------------------------------|------------------|--------------------|
| 10%                           | 10               | \$1,800            |
| 20%                           | 20               | \$3,600            |
| 30%                           | 30               | \$5,400            |

Example: 200 × 20% recovered × 50% completed × \$180 = \$3,600 monthly contribution before cost. Deduplicate repeat callers; exclude existing bookings, spam and noncommercial requests. Capacity, substitution, seasonality and follow-up cost can reduce the result.

Exposure is unresolved demand, not proven lost sales. No ROI or revenue guarantee is implied.

# Every request has a way forward.

Proposed architecture | Tools follow the required customer experience.

## Capture intent + preference

Call / text / form / chat → one request record, time stamp and permission-aware contact preference.

## Route to an accountable owner

Sales, service, parts or finance; explicit backup. Customer context travels with the request.

## Resolve or promise a next step

Answer the actual question. Confirm date, time, action and responsible team in the preferred channel.

## Recover every failed handoff

If unavailable, create a tracked task and give a callback window. Escalate overdue work to a manager.

## Confirm and close the loop

Record completed outcome, confirm with the customer, and monitor unresolved or repeated contacts.

**AI earns a bounded role:** FAQs, intent capture and routine scheduling against verified availability. Human handoff for complex repair, finance, complaints or uncertainty. Never invent availability, diagnose repairs or approve credit. Test fallback before launch.

## 10 / WHAT HAPPENS NEXT

# Turn findings into an operating design.

Each phase has its own scope and decision gate. The assessment is useful on its own.

## Phase 1 / FLOW Assessment

Deliver: evidence log, journey scorecard, friction map and ranked findings. GM gate: agree which problems matter, validate internal causes and choose the first customer path to improve.

## Phase 2 / FLOW Architecture

Deliver: future-state routing maps, owner/backup matrix, callback standards, channel preferences, integration requirements, coaching scripts and costed implementation options. Gate: approve the blueprint, responsibilities and budget before building.

## Phase 3 / Implementation + monitoring

Configure and connect tools; train teams; pilot service recovery; repeat outside-in tests. Track time to meaningful response, clear-next-step rate, overdue tasks, failed handoff recovery and channel-preference adherence.

**Suggested pilot acceptance criteria:** every request has an owner; all pilot transfer-failure tests create a recovery task; 90% of staffed-hours pilot callbacks meet the agreed 30-minute promise. These are proposed targets, not achieved outcomes. Review daily in launch week, weekly for 30 days, then monthly.

Next conversation: choose a pilot path, name its owner, and scope Phase 2. Implementation is separate.

## 11 / EVIDENCE &amp; PROVENANCE

# Real research. Clearly fictional findings.

Research checked September 16, 2026. Links are clickable. Source populations differ; do not blend the rates.

**[1] [Pied Piper | 2026 Service Scheduling Effectiveness study](#)** · September 14, 2026

6,538 service requests across 33 U.S. auto brands and four independent service chains. 16% of dealership telephone callers could not schedule; roughly one in three attempted AI-to-human transfers failed. Study-specific results, not a census.

**[2] [Invoca | Automotive Lead Conversion Benchmarks 2026](#)** · July 2026

58% of calls across automotive businesses reached a person. Automotive analysis sits within a broader 70 million-call, ten-industry dataset. Invoca customer averages; not a dealer-only probability sample. Automated resolutions are not equivalent to failed calls.

**[3] [Cox Automotive | Service Industry Study](#)** · November 11, 2025

45% of vehicle owners were dissatisfied with dealership service, primarily citing unexpected costs and poor communication. Survey: 1,974 owners, April-May 2025. The figure does not isolate communication as the sole cause.

**[4] [J.D. Power | U.S. Customer Service Index](#)** · March 13, 2025

Identifies appointment waits, communication shortfalls and repair quality as constraints on dealer-service satisfaction. Supporting context; no numerical benchmark used here.

**[5] [Consumer discussion | unanswered questions](#)** · July 2025

A poster describes contact-form replies that did not answer a title question and arrived outside stated callback availability. Public self-report; unverified, nonrepresentative.

**[6] [Consumer discussion | channel preference](#)** · December 2024

A poster describes difficulty moving a paperwork conversation to email despite asking. Public self-report; unverified, nonrepresentative.

**[7] [Consumer discussion | service updates](#)** · June 22, 2026

A poster describes sparse and inconsistent repair updates. Public self-report; unverified, nonrepresentative. Consumer summaries draw on publicly indexed excerpts.

**Brand reference:** CreativeHydra public homepage, reviewed September 16, 2026. Cyan, charcoal, Inter-style sans typography and systems-first positioning informed this sample. Dealer observations are original fiction, not attributed to the research providers. No research-provider endorsement is implied.