

CASE STUDY

Ortiz Auto Sales

AI-Powered Inbound Voice Assistant — Brian

CLIENT	AGENT NAME	PLATFORM	CALL TYPE
Ortiz Auto Sales	Brian	Retell + Make	Inbound Sales Calls

Project Overview

Ortiz Auto Sales is a used car dealership located at 4630 E Lake Mead Blvd in Las Vegas, NV, with a diverse inventory of budget-friendly pre-owned vehicles across sedans, SUVs, trucks, and vans from makes like Toyota, Honda, Nissan, Ford, Jeep, and more. The dealership serves a value-conscious customer base, with most vehicles priced under \$10,000.

As a smaller, family-run lot, Ortiz didn't have a large sales team to handle every incoming call — especially during busy hours when staff were already helping customers on the lot. The dealership needed a way to greet every caller, understand what they were looking for, and guide them toward a vehicle or a test drive — without overpromising on pricing, financing, or trade-in numbers that need a real conversation with the sales team.

The solution was **Brian**— an AI-powered inbound voice assistant built on Retell and connected to Make for website link delivery — designed to handle inbound sales calls naturally, guide customers toward the right vehicle, book test drives, and route financing or trade-in questions to the dealership team.

Problem Statement

Ortiz Auto Sales' team faced four recurring challenges with inbound calls:

- Limited staff to answer every call — with a small team often busy with customers already on the lot, incoming calls sometimes went unanswered.
- Pressure to overpromise — well-meaning staff occasionally gave rough pricing, financing, or trade-in estimates over the phone that didn't match what was discussed in person.
- Inconsistent vehicle matching — customers calling with general needs ("something reliable for my family") needed a knowledgeable person on the line to guide them; without one, calls didn't go anywhere.
- Manual website link sharing — when a customer wanted to browse inventory online, sending the link was a manual, easy-to-forget step.

Solution

We built **Brian**— a conversational AI voice assistant deployed on Retell — to handle all inbound sales calls for Ortiz Auto Sales. Sofia listens to what the customer needs first, asks one simple question at a time, recommends vehicles using approved dealership information only, books test drives, and sends the website link via Make once a customer's email is confirmed.

KEY PRINCIPLE

Sofia never guesses on pricing, financing, trade-in value, or availability — those go straight to the dealership team. She also never confirms a model that isn't in inventory; if a customer mentions something unfamiliar, Sofia simply asks which one they meant instead of repeating it back as if it exists.

The Voice Assistant — Brian

Sofia is designed to sound like a relaxed, friendly dealership rep — never pushy, never reading from a script. The system prompt enforces a strict rule against combining actions: Sofia never answers a question and asks the next one in the same breath, keeping the pace easy to follow.

The call flow follows a deliberate structure:

1	Greeting & Listening	Sofia opens with a warm, consistent greeting and lets the customer explain what they're looking for before asking anything — whether that's a specific vehicle, financing, or just browsing.
2	Understanding the Need	Sofia asks one simple follow-up question to narrow things down — car, SUV, or truck; new or used; budget range — using the dealership knowledge base to guide the conversation.
3	Vehicle Guidance	Sofia recommends vehicles using only approved inventory information, never inventing details or guaranteeing something is still available. If a customer names a model not in inventory, Sofia asks which one they meant rather than confirming it.
4	Recommending the Next Step	If the customer is interested, Sofia suggests coming in to see the vehicle or scheduling a test drive — then stops and waits for a response before moving forward.
5	Specialist Escalation	Pricing, financing, and trade-in questions are acknowledged honestly and routed to the dealership's finance team — Sofia never quotes numbers or promises terms.
6	Test Drive Booking	Sofia checks availability, offers two time options, collects name and confirmed email, books the appointment, and triggers an automatic confirmation.
7	Website Link Delivery	If a customer wants to browse online, Sofia offers to send the link first, confirms the email letter by letter, then sends it via Make — a branded email with quick links to inventory, financing, and contact info.

Staying Honest on Pricing

Used car pricing, financing terms, and trade-in values vary based on details Sofia simply doesn't have access to — vehicle condition, credit, and current lot inventory. Rather than guessing, Sofia is built to acknowledge the question honestly and hand it off to the team who can give a real answer.

EXAMPLE INTERACTION

Customer: "What would you give me for my old Civic as a trade-in?"

Sofia: "That really depends on the vehicle's condition and mileage — I can connect you with someone who can give you an accurate appraisal."

This keeps every quote accurate and protects the dealership from mismatched expectations between the phone call and the in-person visit.

Make Automation Backend

The backend uses Make to handle the website link delivery once a customer's email is confirmed.

1 — Website Link Webhook

When a customer confirms they want the website link, a webhook fires to Make carrying the customer's confirmed email address.

2 — Branded Website Link Email

Make sends a branded HTML email styled in Ortiz Auto Sales' black-and-red color scheme, with a direct link to view inventory plus quick links for financing, trade-in, and contact — along with the dealership's address, hours, and phone number. This replaces what used to be a manual step for staff.

3 — Human Transfer

If a customer explicitly asks for a human, or a critical tool fails more than twice, **Brian** acknowledges naturally and transfers the call right away — no extended explanation, no delay.

Tech Stack

Component	Tool / Platform
Voice AI Agent	Retell
Automation / Email Delivery	Make
Test Drive Booking	check_availability_cal + book_appointment_cal
Booking Confirmation	email_confirmation function
Website Link Delivery	Make Webhook → Gmail (HTML Template)
Human Escalation	transfer_call function → Sales Team
Agent Language	English
Timezone	America/New_York (Eastern)

Results

✓	Every inbound sales call answered consistently — even when staff are busy helping customers on the lot.
✓	Vehicle recommendations stay accurate to actual inventory — no invented details, no false availability promises.
✓	Pricing, financing, and trade-in questions routed honestly to the dealership team instead of guessed at over the phone.
✓	Test drives booked end-to-end with confirmed contact details and an automatic booking confirmation.
✓	Website links delivered reliably through a branded email — no manual step left for staff to remember.
✓	Customers mentioning unavailable models are guided naturally instead of being given false confirmation.
✓	Small dealership team freed from routine phone inquiries, able to focus on customers already on the lot.
✓	Consistent, friendly first impression on every call — matching the dealership's pressure-free, family-run approach.