5S Digital Workplace

Audit Scorecard

A 15-point compliance assessment for folder structure, file naming, CRM hygiene, shared drive organisation, duplicate records, and data cleanliness

Dealer / Center Name	
Dealer Code	
Region / Zone	
Auditor Name	
Audit Date	
Cycle / Period	

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How to Use This Scorecard

This scorecard evaluates 5S Digital Workplace compliance across 15 criteria grouped into 4 categories. For each criterion, circle a score from 1 (not in place) to 5 (fully embedded and sustained). Do not rate where you aspire to be — rate what you observe on the day.

Score Scale

Score	Level	What it means
1	**Not in place**	Standard does not exist or has never been implemented at this dealership.
2	**Attempted**	Some effort made but inconsistent — visible gaps remain in most areas.
3	**Defined**	Standard is documented and partially followed. Some areas compliant, others not.
4	**Managed**	Standard is followed consistently. Minor exceptions occur.
5	**Fully Sustained**	Fully embedded. Evidence of ongoing compliance between audits without prompting.

RAG Status Guide

Status	Overall Score	Action
Green	60–75 (80–100%)	Compliant. Maintain current standards.
Amber	38–59 (50–79%)	Improvement required. Structured action plan within 30 days.
Red	0–37 (0–49%)	Non-compliant. Priority intervention. Escalate to regional management.

AutoSmart Tip: Digital 5S is frequently overlooked because disorder in a shared drive or CRM is invisible compared to a messy workshop floor. But a shared drive with 2,000 files in a single folder, a CRM with 30% duplicate records, or a team inbox with 800 unread emails creates the same productivity drain as a disorganised parts store — it just cannot be photographed for an audit report.

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Scorecard

Circle a score 1–5 for each criterion. Record observations in the Notes column.

No.	Criterion / Question	1	2	3	4	5	Notes
FOLDER STRUCTURE & FILE NAMING							
1	Is a defined folder structure in place for shared digital storage (network drive, SharePoint, Google Drive), documented and communicated to all staff who use it?	○	○	○	○	○	
2	Is a consistent file naming convention followed across the team, allowing any file to be located by a colleague without requiring the creator's input?	○	○	○	○	○	
3	Are files stored in their correct folder location, with no files saved to desktop shortcuts, personal drives, or generic 'dump' folders outside the agreed structure?	○	○	○	○	○	
4	Are obsolete file versions deleted or archived to a clearly labelled 'Archive' folder, with no multiple conflicting versions of the same document in the active folder?	○	○	○	○	○	
CRM HYGIENE & DUPLICATE RECORDS							
5	Is the CRM database reviewed on a defined schedule for duplicate customer records, with duplicates merged or resolved rather than accumulating?	○	○	○	○	○	
6	Are incomplete CRM records (missing contact details, unlinked vehicles, blank required fields) identified and completed rather than left as partial data?	○	○	○	○	○	
7	Are outdated or inactive customer records managed per the data retention policy, with records past the retention period archived or deleted rather than left cluttering active views?	○	○	○	○	○	
8	Is CRM data quality reviewed as a metric, with a data completeness or accuracy score tracked and reported to management on a defined cycle?	○	○	○	○	○	
SHARED DRIVE ORGANISATION							
9	Are shared drives or cloud storage areas free from personal files, temporary download folders, or project materials that belong to closed projects but were never archived or deleted?	○	○	○	○	○	
10	Are permissions on shared drive folders configured correctly, with staff having access only to the folders relevant to their role?	○	○	○	○	○	
11	Is a shared drive or cloud storage audit conducted on a defined schedule, with the folder structure reviewed, redundant content removed, and permissions verified?	○	○	○	○	○	

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ACCESS CONTROL & DATA CLEANLINESS							
12	Are system access rights reviewed when a staff member changes role or leaves, with permissions updated or revoked promptly rather than left open?	○	○	○	○	○	
13	Are shared or generic logins (team email, shared admin account) replaced with individual credentials where possible, supporting accountability and data quality?	○	○	○	○	○	
14	Are email inboxes and shared mailboxes managed to a 5S standard — with processed emails filed or deleted rather than accumulating in a single inbox — with a zero-inbox or equivalent discipline in place?	○	○	○	○	○	
15	Is digital workplace 5S reviewed alongside physical 5S in the regular audit cycle, treated as equally important to the cleanliness and organisation of physical work areas?	○	○	○	○	○	
OVERALL SCORE →		/ 75 =		%			

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Category Summary & RAG Status

Transfer category totals from the scorecard. Assign RAG status and record the priority action for each category.

Category	Score	%	RAG	Priority Action
Folder Structure & File Naming	/20			
CRM Hygiene & Duplicate Records	/20			
Shared Drive Organisation	/15			
Access Control & Data Cleanliness	/20			
OVERALL SCORE	**/75**			

Sign-Off

Auditor Name	
Auditor Signature	
Date	
IT / Digital Manager Name	
IT / Digital Manager Signature	
Next Audit Date	

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Action Plan Tracker

5S Digital Workplace — Gap Closure Framework

A structured four-stage workflow to assign, track, verify, and close 5S Digital Workplace non-compliances

Dealer / Center Name	
Dealer Code	
Region / Zone	
Audit Cycle / Period	
Tracker Owner (ASM / ZSM)	
Date Opened	
Target Close Date	

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How to Use This Tracker

This tracker is designed to be completed immediately following a 5S Digital Workplace audit. Every non-compliance recorded must be logged here as an action item and progressed through all four stages before it is considered resolved.

Four-Stage Workflow

1. PENDING	2. IN PROGRESS	3. COMPLETED	4. APPROVED
Finding assigned. Owner & date set.	Work underway. Evidence being gathered.	Dealer submits evidence for review.	Auditor verifies and closes the item.

Stage Rules

Stage	Actioned by	Required action	Evidence required
PENDING	ASM / Auditor	Assign a named responsible party. Set a close date. Log the non-compliance description.	No evidence required at this stage.
IN PROGRESS	5S Digital Workplace / Dealer Team	Begin remediation. Update status. Upload progress evidence as work is completed.	In-progress photos, supporting documents, records.
COMPLETED	IT / Digital Manager	Mark item complete and submit for review. Evidence must be attached before submission.	Photo of rectified item, signed procedure, supporting evidence.
APPROVED	ASM / ZSM / Auditor	Review evidence. Verify compliance on next site visit if required. Approve and close.	Auditor sign-off. Date of verification recorded.

Tracker Summary

Fill in after completing each audit cycle.

Stage	Description	Count	Notes
PENDING	Not yet started		
IN PROGRESS	Work underway		
COMPLETED	Awaiting approval		
APPROVED	Verified & closed		

AutoSmart Tip: With AutoSmart Audit, every non-compliance is automatically converted into an action item at the point of audit — with owner assignment, close dates, evidence upload, and a four-stage approval workflow built in. No spreadsheets. No manual follow-up.

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Action Plan Tracker

Log every non-compliance from the audit below. Progress each item through all four stages before closure.

STAGE — PENDING						
Ref	**Non-Compliance / Gap Description**	**Category**	**Responsible Party**	**Target Date**	**Status**	**Evidence / Notes**
P-01						
P-02						
P-03						
P-04						
P-05						
P-06						
P-07						
P-08						
P-09						
P-10						

STAGE — IN PROGRESS						
Ref	**Non-Compliance / Gap Description**	**Category**	**Responsible Party**	**Target Date**	**Status**	**Evidence / Notes**
I-01						
I-02						
I-03						
I-04						
I-05						
I-06						
I-07						
I-08						

STAGE — COMPLETED						
Ref	**Non-Compliance / Gap Description**	**Category**	**Responsible Party**	**Target Date**	**Status**	**Evidence / Notes**
C-01						

C-02						
C-03						
C-04						
C-05						
C-06						

STAGE — APPROVED						
Ref	**Non-Compliance / Gap Description**	**Category**	**Responsible Party**	**Target Date**	**Status**	**Evidence / Notes**
A-01						
A-02						
A-03						
A-04						
A-05						
A-06						

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Cycle Sign-Off

To be completed once all action items in this cycle are Approved. Both the IT / Digital Manager and the Regional Auditor must sign.

Dealer Principal Name	
Dealer Principal Signature	
Regional Auditor / ASM Name	
Auditor Signature	
Date of Review	
Next Review Date	

Cycle Notes

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