Accessories Sales Process

Audit Scorecard

A 15-point compliance assessment for accessory need identification, product explanation, pricing, customer consent, billing, fitment, and delivery confirmation

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 Accessories Sales Process 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: Accessory sales audits should check attachment rate alongside process compliance — a dealership with a perfect consent and billing process but a 5% accessory attachment rate is leaving significant revenue on the table. The attachment rate gap between top and bottom performers in most networks can be traced directly to whether accessories are presented proactively and tailored to the customer's vehicle, not whether they are available.

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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
NEED IDENTIFICATION & PRODUCT EXPLANATION							
1	Does the sales or service advisor proactively present relevant accessories to every customer at the point of sale or service visit, not only when the customer asks?	○	○	○	○	○	
2	Are accessory recommendations tailored to the customer's specific vehicle, usage, and stated needs — not a generic list presented to all customers equally?	○	○	○	○	○	
3	Is the accessory explained with reference to its specific benefit for the customer's vehicle or lifestyle — not described only by its product name or part number?	○	○	○	○	○	
4	Are fitted accessories demonstrated on the vehicle or a demo unit where possible, rather than described from a brochure alone?	○	○	○	○	○	
PRICING & CUSTOMER CONSENT							
5	Is the price of every accessory clearly stated to the customer before any order is placed, including fitment cost where applicable?	○	○	○	○	○	
6	Is a written accessory order or itemised quote provided to the customer, with each accessory, its price, and fitment cost listed separately?	○	○	○	○	○	
7	Is customer signature or documented digital consent obtained for every accessory order before the accessory is ordered or fitment is scheduled?	○	○	○	○	○	
8	Is the customer informed of the lead time for any accessory not in current stock, with a confirmed delivery or fitment date provided before consent is finalised?	○	○	○	○	○	
BILLING & FITMENT							
9	Is the accessory billing reflected on the invoice clearly and separately from the vehicle price, with no accessories bundled into the vehicle price without individual disclosure?	○	○	○	○	○	
10	Is accessory fitment carried out by a trained technician following the manufacturer's installation instructions, with no improvised installations that could affect vehicle safety or warranty?	○	○	○	○	○	
11	Is a fitment quality check completed after every accessory installation, confirming the accessory is correctly fitted, functional, and free from fitment damage before vehicle release?	○	○	○	○	○	
DELIVERY CONFIRMATION & GOVERNANCE							

12	Is every fitted accessory confirmed with the customer at delivery — walked through and pointed out — with the customer asked to verify it matches what they ordered?	○	○	○	○	○	
13	Is a delivery record signed by the customer confirming receipt of all ordered accessories, used as a reference for any post-delivery query?	○	○	○	○	○	
14	Is accessory sales performance (attachment rate, revenue per vehicle, most popular accessories) tracked and reviewed in the management meeting as a revenue KPI?	○	○	○	○	○	
15	Are staff presenting accessories trained on the current accessory range, pricing, fitment times, and compatibility with specific models — with knowledge refreshed when the accessory catalogue is updated?	○	○	○	○	○	
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
Need Identification & Product Explanation	/20			
Pricing & Customer Consent	/20			
Billing & Fitment	/15			
Delivery Confirmation & Governance	/20			
OVERALL SCORE	**/75**			

Sign-Off

Auditor Name	
Auditor Signature	
Date	
Sales Manager Name	
Sales Manager Signature	
Next Audit Date	

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Action Plan Tracker

Accessories Sales Process — Gap Closure Framework

A structured four-stage workflow to assign, track, verify, and close Accessories Sales Process 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 Accessories Sales Process 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	Accessories Sales Process / Dealer Team	Begin remediation. Update status. Upload progress evidence as work is completed.	In-progress photos, supporting documents, records.
COMPLETED	Sales 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 Sales 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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