Accessory Campaign Execution

Audit Scorecard

A 15-point compliance assessment for campaign offer, eligible models, showroom visibility, staff briefing, stock readiness, sales tracking, and campaign reporting

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 Accessory Campaign Execution 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 campaign execution audits work best when conducted mid-campaign rather than at the end. A mid-campaign visit that finds no staff briefing, missing POSM, or stock gaps can still recover the campaign outcome. A post-campaign audit that discovers the same issues converts findings into learnings only, not recoverable revenue.

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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
CAMPAIGN OFFER & ELIGIBLE MODELS							
1	Is the accessory campaign offer clearly defined — with the specific accessories included, the discount or bundle deal applicable, and the campaign validity period confirmed before dealership activation?	○	○	○	○	○	
2	Is the list of eligible models for the campaign confirmed and communicated to staff before the campaign goes live — preventing campaign offers being made on ineligible vehicles?	○	○	○	○	○	
3	Is the campaign pricing consistent with the approved campaign brief — with no local pricing variations applied without explicit authorisation?	○	○	○	○	○	
4	Are campaign terms (minimum purchase, eligibility conditions, combinability with other offers) understood by all staff presenting the campaign to customers?	○	○	○	○	○	
SHOWROOM VISIBILITY & STAFF BRIEFING							
5	Is campaign material (posters, price boards, digital screens, brochure inserts) displayed in the showroom and at the service reception within the rollout window?	○	○	○	○	○	
6	Are all customer-facing staff briefed on the campaign before it goes live — covering what is on offer, who is eligible, how to present it, and where to direct the customer if they want to purchase?	○	○	○	○	○	
7	Is the campaign material displayed in positions where customers browsing or waiting will encounter it naturally, not placed only in areas where staff can see it?	○	○	○	○	○	
8	Are staff able to describe the campaign offer accurately and enthusiastically when asked — not simply pointing to printed material as a substitute for a verbal explanation?	○	○	○	○	○	
STOCK READINESS & SALES TRACKING							
9	Is stock confirmed as available for the campaign's featured accessories before the campaign is activated, with back-order risk identified and communicated to the sales team?	○	○	○	○	○	
10	Are campaign-associated accessories flagged in the inventory system during the campaign period, allowing accurate reporting of campaign-driven sales versus standard sales?	○	○	○	○	○	
11	Is a daily or weekly sales tracker maintained for campaign accessories, allowing management to monitor uptake and adjust the in-store approach	○	○	○	○	○	

	if conversion is below expectation mid-campaign?						
CAMPAIGN REPORTING & GOVERNANCE							
12	Is a campaign performance report produced at the end of the campaign, covering units sold, revenue generated, stock consumed, and conversion rate against the target?	○	○	○	○	○	
13	Is campaign performance reviewed against the original campaign objective — not only against prior period sales — to determine whether the campaign delivered incremental revenue or substituted purchases that would have occurred anyway?	○	○	○	○	○	
14	Are learnings from campaign execution shared with the marketing team within a defined period, including staff feedback on the offer's appeal, customer reactions, and any stock or communication gaps encountered?	○	○	○	○	○	
15	Is campaign material removed promptly at campaign end, with no expired offers remaining visible to customers after the validity period has closed?	○	○	○	○	○	
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
Campaign Offer & Eligible Models	/20			
Showroom Visibility & Staff Briefing	/20			
Stock Readiness & Sales Tracking	/15			
Campaign Reporting & Governance	/20			
OVERALL SCORE	**/75**			

Sign-Off

Auditor Name	
Auditor Signature	
Date	
Marketing Manager Name	
Marketing Manager Signature	
Next Audit Date	

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Action Plan Tracker

Accessory Campaign Execution — Gap Closure Framework

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