Customer Data Quality

Audit Scorecard

A 15-point compliance assessment for customer profile accuracy, contact details, consent, vehicle details, service history, and CRM update discipline

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 Customer Data Quality 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: Customer data quality audits are most revealing when a real follow-up campaign is used as the test — run a service reminder campaign, measure deliverability (bounce rate, undelivered SMS), and trace failures back to the CRM record. A bounce rate above 10% is a strong indicator of systemic data quality failure that is actively costing the dealership retention 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
PROFILE ACCURACY & CONTACT DETAILS							
1	Is a sample of CRM customer records reviewed, confirming that name, primary phone number, and email address are present and accurate for at least 90% of active customers?	○	○	○	○	○	
2	Are duplicate customer records identified and merged on a defined schedule, to prevent the same customer appearing under multiple profiles with inconsistent data?	○	○	○	○	○	
3	Are customer contact details updated at every touchpoint — service visit, sales enquiry, follow-up call — rather than left as originally entered?	○	○	○	○	○	
4	Are incomplete or clearly incorrect records (placeholder email addresses, sequential phone numbers, missing surnames) flagged and resolved rather than remaining in the active database?	○	○	○	○	○	
CONSENT & VEHICLE DETAILS							
5	Is marketing consent status recorded against every customer record, with consent date and method of consent captured and retained?	○	○	○	○	○	
6	Are consent withdrawals actioned in the CRM within the defined timeframe, with the updated status preventing further marketing until re-consent is obtained?	○	○	○	○	○	
7	Is the customer's current vehicle correctly linked to their CRM profile, with VIN, registration, model, and colour confirmed as accurate?	○	○	○	○	○	
8	Are vehicle changes (trade-in, private sale, new purchase) updated in the CRM promptly, with no customer record still linked to a vehicle they no longer own?	○	○	○	○	○	
SERVICE HISTORY & COMPLAINT RECORDS							
9	Is the service history for each vehicle accurately reflected in the CRM, with no visits missing, incorrectly attributed, or duplicated?	○	○	○	○	○	
10	Are complaint records linked to the customer's CRM profile, visible to staff handling future interactions, so the customer does not need to re-explain prior issues?	○	○	○	○	○	
11	Is the CRM accessible to all customer-facing staff in real time, with no department maintaining a parallel record that could diverge from the central system?	○	○	○	○	○	
CRM UPDATE DISCIPLINE & GOVERNANCE							

12	Is CRM update at each customer touchpoint a defined process requirement — not discretionary — with non-compliance treated as a workflow gap?	○	○	○	○	○	
13	Is CRM data quality reviewed on a defined schedule, with a data quality score or equivalent metric tracked and reviewed at management level?	○	○	○	○	○	
14	Are staff who consistently fail to update the CRM accurately or promptly identified through data quality monitoring and coached, rather than the issue being managed only through reporting?	○	○	○	○	○	
15	Is there a data steward or CRM administrator responsible for data quality governance, with authority to enforce data standards across all departments?	○	○	○	○	○	
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
Profile Accuracy & Contact Details	/20			
Consent & Vehicle Details	/20			
Service History & Complaint Records	/15			
CRM Update Discipline & Governance	/20			
OVERALL SCORE	**/75**			

Sign-Off

Auditor Name	
Auditor Signature	
Date	
CRM / Data Manager Name	
CRM / Data Manager Signature	
Next Audit Date	

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Action Plan Tracker

Customer Data Quality — Gap Closure Framework

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