Customer Experience Audit

Audit Scorecard

A 15-point end-to-end assessment covering the full customer journey from enquiry through showroom, test drive, purchase, delivery, service, and follow-up

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 Experience Audit 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: A CX audit is most reliable when the auditor traces the full customer journey as a mystery shopper would — from the first digital touchpoint through to a follow-up call after a notional service visit. Assessing each stage independently misses the handoff failures between departments, which are typically where the customer's experience deteriorates most.

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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
ENQUIRY & SHOWROOM VISIT							
1	Is every customer enquiry — digital, phone, or walk-in — acknowledged within a defined response time, with the customer's name and query recorded before any sales activity begins?	○	○	○	○	○	
2	Does the showroom environment (cleanliness, lighting, temperature, music level, refreshment availability) create a positive first impression consistently throughout operating hours?	○	○	○	○	○	
3	Is the customer greeted by a member of staff within the defined standard time of entering the showroom, without being left to browse unattended beyond the wait threshold?	○	○	○	○	○	
4	Is the customer's reason for visit and immediate need understood before any product recommendation or demonstration is offered?	○	○	○	○	○	
TEST DRIVE & PURCHASE							
5	Is a test drive offered proactively to every customer with a genuine purchase intent, rather than only when the customer asks?	○	○	○	○	○	
6	Is the purchase process transparent — with finance options, add-on products, and total cost of ownership clearly explained before the customer is asked to make a decision?	○	○	○	○	○	
7	Are customers given adequate time and space to consider their decision, without pressure techniques or artificial urgency that could undermine trust?	○	○	○	○	○	
8	Is the handover from sales to finance to delivery a seamless experience for the customer, with no repetition of information already given and no unexplained waiting?	○	○	○	○	○	
DELIVERY & SERVICE EXPERIENCE							
9	Is the vehicle delivery conducted as a structured, unhurried experience — with the customer's name on a welcome board, the vehicle presented clean, and a dedicated walk-around completed?	○	○	○	○	○	
10	Is the service visit experience assessed from the customer's perspective — covering ease of booking, reception quality, waiting comfort, communication during the visit, and delivery explanation?	○	○	○	○	○	
11	Are all customer-facing staff consistent in manner, product knowledge, and process — with no variation in experience quality	○	○	○	○	○	

	depending on which staff member handles the customer?						
12	Is the customer's overall experience tracked through a satisfaction survey or equivalent mechanism, with results reviewed at the individual touchpoint level?	○	○	○	○	○	
COMPLAINT HANDLING & FOLLOW-UP							
13	Are complaints handled in a way that restores customer trust rather than merely resolving the transaction — with empathy, speed, and a genuine attempt to understand the customer's perspective?	○	○	○	○	○	
14	Is a post-service or post-delivery follow-up made to every customer, confirming satisfaction and offering a point of contact for any subsequent concern?	○	○	○	○	○	
15	Is CX performance reviewed in management meetings as a strategic metric alongside financial performance, not only reported as a compliance output?	○	○	○	○	○	
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
Enquiry & Showroom Visit	/20			
Test Drive & Purchase	/20			
Delivery & Service Experience	/20			
Complaint Handling & Follow-Up	/15			
OVERALL SCORE	**/75**			

Sign-Off

Auditor Name	
Auditor Signature	
Date	
Customer Experience Manager Name	
Customer Experience Manager Signature	
Next Audit Date	

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Action Plan Tracker

Customer Experience Audit — Gap Closure Framework

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