Customer Experience Corrective Action Plan

Audit Scorecard

A 15-point compliance assessment for CX gaps, root cause, responsible person, customer impact assessment, evidence submission, and closure effectiveness

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 Corrective Action Plan 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: CX corrective action plans are only as valuable as the outcome they produce. The clearest test of plan effectiveness is whether the customer experience metric that triggered the action — an NPS score, a specific complaint category, a mystery shop rating — has improved in the cycle following closure. An action plan that closes every item on time but shows no metric improvement is completing tasks without changing experiences.

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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
CX GAP IDENTIFICATION & CUSTOMER IMPACT							
1	Is each CX corrective action item clearly linked to a specific finding — NPS/CSI low score, complaint trend, mystery shop result, VoC feedback, or journey mapping gap?	○	○	○	○	○	
2	Is a customer impact statement included for each action item, describing how the gap currently affects the customer experience in concrete terms?	○	○	○	○	○	
3	Are recurring CX gaps (same issue appearing across multiple audit cycles or customer feedback periods) flagged as systemic, triggering a higher-priority response than one-off findings?	○	○	○	○	○	
4	Are action items prioritised by customer impact — with high-frequency or high-severity experience failures addressed before lower-impact items?	○	○	○	○	○	
ROOT CAUSE & RESPONSIBLE PERSON							
5	Is a root cause statement documented for each action item, distinguishing whether the gap is driven by process, training, system, behaviour, or environment?	○	○	○	○	○	
6	Is a named individual (not a department) assigned as responsible for each action item, with that individual's manager copied as the escalation owner?	○	○	○	○	○	
7	Does the corrective action directly address the root cause — not only the symptom — with a specific change to process, training content, or system configuration proposed?	○	○	○	○	○	
8	Has the responsible person acknowledged the action, understood what is required of them, and confirmed the proposed corrective measure before the due date is set?	○	○	○	○	○	
EVIDENCE SUBMISSION & APPROVAL							
9	Is the type of evidence required to close each action item defined upfront and proportionate to the change required — e.g., updated SOP, training attendance record, revised script, before/after NPS score?	○	○	○	○	○	
10	Is submitted evidence reviewed by the CX Manager or Dealer Principal before the action is accepted as closed, rather than self-certified by the responsible person?	○	○	○	○	○	
11	Is photographic, documentary, or system-based evidence retained for every closed action item,	○	○	○	○	○	

	available for review at the next audit cycle?						
DUE DATE & CLOSURE EFFECTIVENESS							
12	Are due dates set realistically, proportionate to the complexity of the change — with short-term actions (display fix, script update) separated from structural changes (process redesign, system change)?	○	○	○	○	○	
13	Are overdue action items escalated to the Dealer Principal on a defined cycle, rather than rolling forward indefinitely without consequence?	○	○	○	○	○	
14	Is the effectiveness of each closed action verified at the next measurement cycle — confirming whether the relevant NPS/CSI score, complaint rate, or mystery shop result improved?	○	○	○	○	○	
15	Is there evidence across the full action plan register that corrective actions are producing measurable CX improvements, not only administrative closures?	○	○	○	○	○	
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
CX Gap Identification & Customer Impact	/20			
Root Cause & Responsible Person	/20			
Evidence Submission & Approval	/15			
Due Date & Closure Effectiveness	/20			
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 Corrective Action Plan — Gap Closure Framework

A structured four-stage workflow to assign, track, verify, and close Customer Experience Corrective Action Plan 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 Corrective Action Plan 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 Corrective Action Plan / 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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