Customer Handover Between Departments

Audit Scorecard

A 15-point compliance assessment for sales-to-delivery, sales-to-service, service-to-parts, complaint-to-management, and CRM handover 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 Handover Between Departments 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: Handover failures are invisible in most dealership metrics because neither the sending nor receiving team flags the gap — the customer absorbs the friction and either tolerates it or leaves. Shadowing a customer across two or three department transitions on the same day is the most reliable way to surface handover gaps that internal data will never reveal.

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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
SALES-TO-DELIVERY & SALES-TO-SERVICE HANDOVER							
1	Is a structured handover process followed when a customer transitions from the sales team to the delivery team, with all relevant customer preferences, promises made, and vehicle details transferred in writing?	○	○	○	○	○	
2	Is the delivery team briefed on the customer's name, vehicle, key preferences, and any special arrangements before the customer arrives for collection?	○	○	○	○	○	
3	Is the customer introduced to the service team by the sales advisor at or before delivery, establishing a named service contact for their ongoing ownership experience?	○	○	○	○	○	
4	Is the customer's vehicle service history, upcoming service dates, and warranty status transferred to the service team's DMS record at point of sale, not left for the customer to explain at their first service visit?	○	○	○	○	○	
SERVICE-TO-PARTS & WORKSHOP HANDOVER							
5	Is the parts requirement for each job confirmed with the parts department before the workshop allocates the job to a technician, to prevent bay downtime caused by unavailable parts?	○	○	○	○	○	
6	Are back-ordered or delayed parts communicated from parts to the service advisor promptly, allowing the customer to be informed before the promised delivery time has passed?	○	○	○	○	○	
7	When a vehicle is transferred from one technician to another mid-repair (shift change, skill escalation), is a formal handover note completed covering work done, work remaining, and any open diagnostic questions?	○	○	○	○	○	
8	Is there a documented sign-off at each stage of the repair — job allocated, work completed, quality checked — so no stage is assumed complete without explicit confirmation?	○	○	○	○	○	
COMPLAINT-TO-MANAGEMENT HANDOVER							
9	Is the full complaint history (initial complaint, actions taken, customer communications, prior resolution attempts) transferred to the escalating manager before the manager contacts the customer?	○	○	○	○	○	
10	Is the customer informed that their complaint has been escalated and who will be contacting them, rather than receiving an unexpected call from someone they have not previously dealt with?	○	○	○	○	○	

11	Is the management owner of the escalated complaint formally recorded in the complaint system, with accountability for resolution sitting with a named individual rather than a department?	○	○	○	○	○	
CRM HANDOVER DISCIPLINE & GOVERNANCE							
12	Is the CRM record fully updated at each handover point — with notes, next actions, and ownership transferred — so the receiving team member has complete context without needing to ask the customer to repeat themselves?	○	○	○	○	○	
13	Is there a defined protocol for what information must be recorded in the CRM before a handover is considered complete, with no handover accepted by the receiving team if the record is incomplete?	○	○	○	○	○	
14	Are handover failures (customer needing to repeat information, missed follow-up due to handover gap, incorrect information transferred) logged and reviewed as a process metric?	○	○	○	○	○	
15	Is handover discipline reviewed as part of the regular CX and operations management meeting, with persistent handover gaps addressed through process redesign rather than repeated individual coaching?	○	○	○	○	○	
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
Sales-to-Delivery & Sales-to-Service Handover	/20			
Service-to-Parts & Workshop Handover	/20			
Complaint-to-Management Handover	/15			
CRM Handover Discipline & Governance	/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 Handover Between Departments — Gap Closure Framework

A structured four-stage workflow to assign, track, verify, and close Customer Handover Between Departments 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 Handover Between Departments 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 Handover Between Departments / 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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