Customer Loyalty Program

Audit Scorecard

A 15-point compliance assessment for loyalty enrolment, benefit communication, reward tracking, eligibility, usage reporting, and retention impact

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 Loyalty Program 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: Loyalty programme audits should evaluate impact, not just activity. Enrolment rates and redemption volumes tell you how well the programme is being administered — but the only metric that tells you if it is actually working is whether enrolled members return at a higher rate than non-members. Always check the retention differential, not just the programme statistics.

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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
ENROLMENT & ELIGIBILITY							
1	Is every eligible customer offered loyalty programme enrolment at the point of purchase or first service visit, with enrolment rate tracked per advisor?	○	○	○	○	○	
2	Is the loyalty programme eligibility criteria clearly defined, documented, and consistently applied, with no eligible customer excluded or ineligible customer enrolled?	○	○	○	○	○	
3	Is the enrolment process simple and completable within a single interaction, without requiring the customer to complete lengthy documentation independently?	○	○	○	○	○	
4	Is enrolment recorded in the CRM at the point of sign-up, immediately visible to all staff so the customer's loyalty status is recognised at every future touchpoint?	○	○	○	○	○	
BENEFIT COMMUNICATION & REWARD TRACKING							
5	Are loyalty programme benefits explained clearly and specifically at the point of enrolment, not left for the customer to discover from printed material?	○	○	○	○	○	
6	Are customers reminded of their loyalty programme benefits at each relevant touchpoint — service visit, anniversary, redemption opportunity — rather than only at enrolment?	○	○	○	○	○	
7	Is each member's reward balance, redemption history, and upcoming eligibility tracked accurately in the system, accessible to staff at point of interaction?	○	○	○	○	○	
8	Are rewards redeemed promptly and correctly when the customer is eligible, with no customer needing to chase for a reward they have earned?	○	○	○	○	○	
USAGE REPORTING							
9	Is programme enrolment rate, active member rate, and redemption rate tracked on a defined cycle?	○	○	○	○	○	
10	Is the programme's cost per retention outcome (enrolled member who returns versus non-member) calculated and reviewed to confirm the programme is generating positive ROI?	○	○	○	○	○	
11	Are members who have not engaged with their benefits in a defined period identified and targeted with a specific re-engagement offer?	○	○	○	○	○	
RETENTION IMPACT & GOVERNANCE							

12	Is the return rate of loyalty programme members compared against non-members, confirming the programme is producing a measurable retention benefit?	○	○	○	○	○	
13	Is the loyalty programme reviewed at least annually, with benefits, thresholds, and communication cadence updated based on member behaviour and retention data?	○	○	○	○	○	
14	Is there a named owner of the loyalty programme at the dealership, responsible for enrolment rates, member engagement, and retention outcome reporting?	○	○	○	○	○	
15	Is loyalty programme performance included in the regular management review, reviewed alongside service retention and revenue metrics rather than as a standalone marketing item?	○	○	○	○	○	
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
Enrolment & Eligibility	/20			
Benefit Communication & Reward Tracking	/20			
Usage Reporting	/15			
Retention Impact & 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 Loyalty Program — Gap Closure Framework

A structured four-stage workflow to assign, track, verify, and close Customer Loyalty Program 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 Loyalty Program 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 Loyalty Program / 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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