EV Customer Education

Audit Scorecard

A 15-point compliance assessment for charging guidance, range explanation, battery care, safety instructions, warranty coverage, and app handover

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 EV Customer Education 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: EV customer education is a retention and satisfaction investment, not a compliance step. A customer who leaves without understanding range planning, home charging setup, or app functionality is likely to experience range anxiety, feel let down by their purchase, and be less likely to return for service or repurchase. The education conversation at handover sets the tone for the entire ownership relationship.

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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
CHARGING GUIDANCE & RANGE EXPLANATION							
1	Are customers provided with clear, model-specific guidance on the different charging levels available (AC home charging, public AC, DC fast charge) and what each means for their daily usage?	○	○	○	○	○	
2	Is the difference between WLTP range and real-world range explained to the customer before purchase, including the factors that reduce real-world range (temperature, speed, climate control use)?	○	○	○	○	○	
3	Are customers shown how to plan a longer journey using the vehicle's navigation or a charging network app, rather than leaving them to discover range planning independently?	○	○	○	○	○	
4	Is the recommended home charging solution (charger specification, installation guidance, smart charging tariff benefit) explained at point of sale, not only in the owner's manual?	○	○	○	○	○	
BATTERY CARE & SAFETY INSTRUCTIONS							
5	Are customers advised on battery care best practices — optimal daily state of charge range, avoiding prolonged 100% charge when not needed, and the impact of fast charging frequency on long-term battery health?	○	○	○	○	○	
6	Are customers informed of the specific safety considerations for EV ownership — not parking over accumulated dry vegetation when the battery is warm, checking for recalls, and what to do if they notice unusual battery behaviour?	○	○	○	○	○	
7	Is the customer made aware of what the battery warranty covers — capacity retention threshold, coverage period, exclusions — before completing the purchase?	○	○	○	○	○	
8	Are customers shown how to identify and respond to EV warning indicators on the dashboard that indicate a battery or charging system fault, rather than assuming these will be covered in the manual?	○	○	○	○	○	
WARRANTY COVERAGE & MOBILE APP							
9	Is the full EV warranty package (vehicle warranty, battery warranty, powertrain warranty) explained to the customer with specific coverage periods and any maintenance conditions that apply?	○	○	○	○	○	
10	Is the manufacturer's connected vehicle app (or equivalent remote monitoring tool) downloaded, paired, and demonstrated to the customer at	○	○	○	○	○	

	point of delivery?						
11	Is the customer shown how to use the app for key functions — pre-conditioning, charge monitoring, charge scheduling, remote lock — before they leave the dealership?	○	○	○	○	○	
HANDOVER EXPLANATION & GOVERNANCE							
12	Is a structured EV customer education checklist completed at handover, confirming each education topic was covered and the customer had the opportunity to ask questions?	○	○	○	○	○	
13	Is the EV education handover signed by both the sales advisor and the customer, retained as evidence of what was covered?	○	○	○	○	○	
14	Is a follow-up contact made within 7 days of EV delivery specifically to address any charging or operational questions that have emerged since the customer began using the vehicle?	○	○	○	○	○	
15	Are sales and service staff trained on EV customer education content, with training updated when new model-specific guidance is issued by the OEM?	○	○	○	○	○	
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
Charging Guidance & Range Explanation	/20			
Battery Care & Safety Instructions	/20			
Warranty Coverage & Mobile App	/15			
Handover Explanation & Governance	/20			
OVERALL SCORE	**/75**			

Sign-Off

Auditor Name	
Auditor Signature	
Date	
Sales Manager Name	
Sales Manager Signature	
Next Audit Date	

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Action Plan Tracker

EV Customer Education — Gap Closure Framework

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