New Dealer Setup

Audit Scorecard

A 15-point readiness assessment for showroom and workshop setup, branding, manpower, systems, and go-live approval

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 New Dealer Setup 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: New dealer setup audits should be run as a staged checklist — facility and workshop readiness first, then manpower and training, with systems and go-live readiness assessed last and only once the first three categories are fully Green. Approving go-live before facility or training gaps are closed is the most common cause of early post-launch non-compliance.

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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
FACILITY & SHOWROOM SETUP							
1	Is the showroom fully fitted out per the approved facility design and brand corporate identity manual, including signage, flooring, and lighting?	○	○	○	○	○	
2	Are vehicle display areas, price tag placements, and specification stands set up per brand display standards?	○	○	○	○	○	
3	Is the customer lounge, reception, and waiting area fully furnished and equipped (seating, Wi-Fi, refreshments) per the standard requirement?	○	○	○	○	○	
4	Are all required exterior signage, pylon, and fascia elements installed and matching the latest approved brand guideline?	○	○	○	○	○	
WORKSHOP & EQUIPMENT SETUP							
5	Are all required workshop bays, lifts, and equipment installed, commissioned, and certified for use per manufacturer specification?	○	○	○	○	○	
6	Is the parts store fully racked, labelled, and stocked with the opening inventory per the agreed stocking plan?	○	○	○	○	○	
7	Are required tools, diagnostic equipment, and special service tools (SSTs) available and calibrated as per OEM requirement?	○	○	○	○	○	
8	Are health & safety, fire safety, and environmental compliance requirements (waste segregation, signage, firefighting equipment) fully in place?	○	○	○	○	○	
MANPOWER & TRAINING							
9	Are all key roles (sales, service, parts, management) recruited and in position ahead of the planned launch date?	○	○	○	○	○	
10	Have all customer-facing and technical staff completed mandatory OEM/brand training and certification prior to go-live?	○	○	○	○	○	
11	Is an organisation chart with defined roles, responsibilities, and reporting lines documented and communicated to all staff?	○	○	○	○	○	
SYSTEMS & GO-LIVE READINESS							
12	Is the dealer management system (DMS) or CRM fully configured, tested, and ready for live transactions?	○	○	○	○	○	

13	Are all required business licences, permits, and insurance certificates obtained and valid ahead of launch?	○	○	○	○	○	
14	Has a soft-launch or trial run been conducted to test end-to-end customer journey (sales enquiry through to service booking) before go-live?	○	○	○	○	○	
15	Has formal go-live sign-off been obtained from all required stakeholders (OEM/distributor, dealer principal, regional management)?	○	○	○	○	○	
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
Facility & Showroom Setup	/20			
Workshop & Equipment Setup	/20			
Manpower & Training	/15			
Systems & Go-Live Readiness	/20			
OVERALL SCORE	**/75**			

Sign-Off

Auditor Name	
Auditor Signature	
Date	
Dealer Principal Name	
Dealer Principal Signature	
Next Audit Date	

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Action Plan Tracker

New Dealer Setup — Gap Closure Framework

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