Pre-Delivery Accessories

Audit Scorecard

A 15-point compliance assessment for customer-approved accessories, fitment schedule, stock availability, installation quality, billing, and delivery readiness

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 Pre-Delivery Accessories 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: Pre-delivery accessory failures are disproportionately damaging to customer satisfaction because they occur at the moment of highest emotional investment — vehicle collection. A missing floor mat or an unfitted tow bar on collection day creates a negative lasting impression that is out of proportion to the item's value. Treat every pre-delivery accessory verification as a zero-defect checkpoint.

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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
CUSTOMER APPROVAL & FITMENT SCHEDULE							
1	Is a confirmed, signed accessory order attached to every vehicle record before workshop fitment is scheduled, with no fitment commencing based on verbal instruction alone?	○	○	○	○	○	
2	Is the accessory fitment scheduled before the vehicle's delivery date, with sufficient lead time to accommodate any ordered items that are not in current stock?	○	○	○	○	○	
3	Is the customer informed of which accessories will be fitted before delivery and which (if any) require a return workshop visit, before the delivery appointment is confirmed?	○	○	○	○	○	
4	Is a pre-delivery accessory checklist created for each vehicle, listing every customer-approved accessory, its part number, fitment method, and the technician assigned?	○	○	○	○	○	
STOCK AVAILABILITY & INSTALLATION QUALITY							
5	Is stock availability for all customer-ordered accessories confirmed before the delivery date is set — not assumed from normal replenishment lead times?	○	○	○	○	○	
6	Are accessories that are not in stock ordered immediately upon customer approval, with the expected delivery date tracked and the delivery date adjusted if stock will not arrive in time?	○	○	○	○	○	
7	Is accessory installation completed by a trained technician following the OEM or manufacturer's installation instructions, not improvised based on similar-looking accessories?	○	○	○	○	○	
8	Are accessories that require software programming or calibration (e.g., towbar electrics requiring trailer module coding, dashcam hardwiring requiring fuse tap selection) completed by technicians qualified to perform those steps?	○	○	○	○	○	
BILLING ACCURACY							
9	Is the accessory invoice generated before the vehicle is presented for delivery, with every ordered accessory itemised and confirmed against the customer's original signed order?	○	○	○	○	○	
10	Is the accessory invoice reviewed by a manager or team leader against the signed accessory order before delivery, to identify any missing items or billing discrepancies before the customer arrives?	○	○	○	○	○	
11	Is any change from the original order —	○	○	○	○	○	

	substituted part, delayed item, price revision — communicated to and approved by the customer before the revised invoice is finalised?						
DELIVERY READINESS & GOVERNANCE							
12	Is a pre-delivery accessory verification check completed — physically confirming each accessory is fitted, functional, and undamaged — before the vehicle is moved to the delivery bay?	○	○	○	○	○	
13	Are fitted accessories included in the vehicle's delivery walk-around, with the customer shown each accessory, its location, and its basic operation at handover?	○	○	○	○	○	
14	Is the accessory delivery record signed by the customer at handover, confirming all ordered items were received and are to their satisfaction?	○	○	○	○	○	
15	Are pre-delivery accessory failures (wrong part fitted, item not available, installation damage) tracked as a separate quality metric, reviewed to identify recurring fitment or stock management gaps?	○	○	○	○	○	
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
Customer Approval & Fitment Schedule	/20			
Stock Availability & Installation Quality	/20			
Billing Accuracy	/15			
Delivery Readiness & 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

Pre-Delivery Accessories — Gap Closure Framework

A structured four-stage workflow to assign, track, verify, and close Pre-Delivery Accessories 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 Pre-Delivery Accessories 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	Pre-Delivery Accessories / 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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