Revenue Generation

Audit Scorecard

A 15-point compliance assessment for marketing execution, accessory upsell, value-added services, and post-sale follow-up

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 Revenue Generation compliance across 15 criteria grouped into five categories. For each criterion, circle a score from 1 (not in place) to 5 (fully embedded and sustained). Where indicated, verify through system records, physical inspection, or staff knowledge checks. 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: Revenue generation audits are most effective when cross-referenced with actual sales data. Ask to see the accessories sales report, Body & Paint conversion log, and the post-delivery follow-up logbook during the visit. Compliance without performance data tells only half the story.

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Scorecard

Circle a score 1–5 for each criterion. Record observations and any supporting data references in the Notes column.

No.	Criterion / Question	1	2	3	4	5	Notes
MARKETING & CAMPAIGN AWARENESS							
1	Are the frontline staff aware of the recent marketing campaigns for both sales and aftersales?	○	○	○	○	○	
2	Are all current sales marketing materials displayed in prominent areas of the showroom?	○	○	○	○	○	
3	Is there a documented process for cascading new campaign information to frontline staff, and is a record of briefings maintained?	○	○	○	○	○	
ACCESSORIES & UPSELL							
4	Is an accessory display stand available, located in a central area for customer accessibility, and visible from the reception?	○	○	○	○	○	
5	Is an accessory promotion brochure available for customers, either in handout or digital format?	○	○	○	○	○	
6	Are service advisors trained to recommend and upsell accessories at the point of vehicle handover or service completion?	○	○	○	○	○	
7	Is accessories sales performance tracked per service advisor or per period, and reviewed in team meetings?	○	○	○	○	○	
INSURANCE & VALUE-ADDED SERVICES							
8	Is there a facility available at the service center to renew insurance policies for customers?	○	○	○	○	○	
9	Are customers proactively informed about insurance renewal at the time of service booking or vehicle drop-off?	○	○	○	○	○	
BODY & PAINT							
10	Are Body & Paint services (such as smart repair, paintless dent removal, polishing, etc.) actively promoted and sold through service centers?	○	○	○	○	○	
11	Is there an incentive system in place for Service Advisors to promote and sell Body & Paint services?	○	○	○	○	○	
12	Is Body & Paint conversion tracked — i.e., are the number of estimates given versus jobs won recorded and reviewed periodically?	○	○	○	○	○	
POST-SALE FOLLOW-UP & CRM							

13	Is a daily logbook available for the salesperson (digitally, printed, or photographed) to track post-sales follow-up on a daily basis?	○	○	○	○	○	
14	Is the newly delivered vehicle details information shared with the service manager on a weekly basis?	○	○	○	○	○	
15	Is there a defined follow-up schedule for newly delivered vehicle customers (e.g., 7-day, 30-day contact), and is adherence to this schedule monitored?	○	○	○	○	○	
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
Marketing & Campaign Awareness	/15			
Accessories & Upsell	/20			
Insurance & Value-Added Services	/10			
Body & Paint	/15			
Post-Sale Follow-Up & CRM	/15			
OVERALL SCORE	**/75**			

Sign-Off

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

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Action Plan Tracker

Revenue Generation — Gap Closure Framework

A structured four-stage workflow to assign, track, verify, and close Revenue Generation 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 Revenue Generation 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	RevGen / Dealer Team	Begin remediation. Update status. Upload progress evidence as work is completed.	In-progress photos, updated materials, training records.
COMPLETED	Sales / Service Manager	Mark item complete and submit for review. Evidence must be attached before submission.	Photo of display, updated logbook, system screenshot.
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

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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 / Service 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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