Sales Department

Audit Scorecard

A 15-point compliance assessment for showroom standards, customer experience, and vehicle delivery

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 Sales Department compliance across 15 criteria grouped into four categories. For each criterion, circle a score from 1 (not in place) to 5 (fully embedded and sustained). Where indicated, verify compliance through direct observation during the visit. 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: Sales audits are best conducted as an unannounced mystery-style visit where possible. The quality of the first two minutes of a customer interaction — greeting, response time, and initial engagement — is one of the strongest predictors of overall sales performance and customer satisfaction.

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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
SHOWROOM STANDARDS & DISPLAY							
1	Is the distance between displayed vehicles 2 meters, are the doors unlocked during showroom working hours, are floor mats installed, are interior plastic covers removed, and are the display vehicles clean and polished?	○	○	○	○	○	
2	Does the showroom display the price tag on every vehicle (left lower portion of the windshield glass), and is the price consistent with the website price?	○	○	○	○	○	
3	Does the showroom display the vehicle specifications (equipment disclosure) on a stand near the vehicle (front driver side), and is the latest updated version of the specification sheet displayed?	○	○	○	○	○	
4	Are the floor, lights, roof, showroom glass, and doors in good condition, with a light intensity of 500 lux or more, and are all display electronics and walls clean and well-maintained?	○	○	○	○	○	
5	Are promotional materials, brochures, and campaign displays current, correctly placed, and free from outdated pricing or superseded model information?	○	○	○	○	○	
SHOWROOM ENVIRONMENT & FACILITIES							
6	Are all tables in the showroom properly arranged, with 5S applied to the salesman's desk, and is the showroom's AC working properly?	○	○	○	○	○	
7	Is test drive availability communicated to walk-in customers, and is a test drive vehicle maintained in clean, roadworthy condition at all times?	○	○	○	○	○	
CUSTOMER EXPERIENCE & SALES PROCESS							
8	Must the customer be attended to by a sales staff member within 2 minutes of entering the showroom?	○	○	○	○	○	
9	Should the salesperson accompany the customer throughout the visit, including the walk-around and when leaving the showroom?	○	○	○	○	○	
10	Is a customer needs assessment or inquiry form completed for every walk-in visit, and are follow-up actions logged in the CRM or lead tracking system?	○	○	○	○	○	

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11	Is a structured vehicle walk-around presentation conducted for every customer, covering key features, technology, and ownership benefits?	○	○	○	○	○	
DELIVERY & HANDOVER							
12	Is the sales delivery area free from odour, clean, and organised?	○	○	○	○	○	
13	Is the car in good condition (no odour and clean) unless otherwise requested by the customer?	○	○	○	○	○	
14	Is a pre-delivery inspection (PDI) completed and signed off for every vehicle prior to customer handover, with the PDI checklist retained on file?	○	○	○	○	○	
15	Does the handover process include a documented explanation of vehicle features, warranty terms, and after-sales contact points, with customer acknowledgement obtained?	○	○	○	○	○	
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
Showroom Standards & Display	/25			
Showroom Environment & Facilities	/10			
Customer Experience & Sales Process	/20			
Delivery & Handover	/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

Sales Department — Gap Closure Framework

A structured four-stage workflow to assign, track, verify, and close Sales non-compliances

Dealer / Center Name	
Dealer Code	
Region / Zone	
Audit Cycle / Period	
Tracker Owner (ASM / ZSM)	
Date Opened	
Target Close Date	

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.

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How to Use This Tracker

This tracker is designed to be completed immediately following a Sales audit. Every non-compliance recorded must be logged here as an action item and progressed through all four stages before it is considered resolved.

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	Sales / Dealer Team	Begin remediation. Update status. Upload progress evidence as work is completed.	In-progress photos, updated displays, training records.
COMPLETED	Sales Manager	Mark item complete and submit for review. Evidence must be attached before submission.	Photo of rectified item, updated document, signed checklist.
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 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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