Service Advisor Performance

Audit Scorecard

A 15-point compliance assessment for appointment handling, upselling, estimate accuracy, customer communication, and CSI impact

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 Service Advisor Performance 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: Service advisor performance audits are most effective when they include a live observation of at least one customer interaction — from arrival through to estimate delivery. A completed job card and a signed delivery record tell you what was documented; observing the interaction tells you what actually happened.

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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
APPOINTMENT HANDLING & RECEPTION							
1	Does the service advisor confirm every appointment 24 hours in advance and ensure the customer's vehicle history and complaint are reviewed before arrival?	○	○	○	○	○	
2	Does the advisor greet the arriving customer within the defined wait time standard, making them feel expected and welcomed?	○	○	○	○	○	
3	Is a vehicle walkaround conducted with the customer at intake, with pre-existing damage noted and acknowledged before work begins?	○	○	○	○	○	
4	Does the advisor ask open-ended diagnostic questions to fully understand the customer's concern, rather than accepting a brief complaint without probing?	○	○	○	○	○	
UPSELLING & ESTIMATE EXPLANATION							
5	Does the advisor proactively inform the customer of any due maintenance items (based on mileage or last service date) identified at intake?	○	○	○	○	○	
6	Are upsell recommendations made in a way that clearly explains the benefit to the customer, not presented as an add-on pressure sale?	○	○	○	○	○	
7	Is the initial estimate explained clearly — labour, parts, and any applicable taxes itemised — before the customer is asked to approve?	○	○	○	○	○	
8	Is additional work approval obtained from the customer verbally and confirmed in writing before work proceeds, with the advisor noting the approval method on the job card?	○	○	○	○	○	
CUSTOMER COMMUNICATION							
9	Is the customer proactively contacted with a status update if the vehicle will not be ready by the promised time, before the customer has to chase?	○	○	○	○	○	
10	Is the customer informed of any findings beyond the original scope in plain language, with a clear recommendation and the customer's options explained?	○	○	○	○	○	
11	Is the delivery walkthrough conducted by the advisor personally — not handed off to another staff member — covering work done, invoice, and next service reminder?	○	○	○	○	○	
JOB CARD ACCURACY & CSI IMPACT							
12	Are the advisor's job cards reviewed periodically	○	○	○	○	○	

	for accuracy, completeness, and customer complaint recording quality?						
13	Is the advisor's individual CSI score or customer satisfaction rating tracked, with low scores triggering a coaching conversation rather than only being reported?	○	○	○	○	○	
14	Are advisor-specific performance metrics (jobs handled, upsell conversion, on-time delivery rate, comeback rate) reviewed in regular one-to-one meetings?	○	○	○	○	○	
15	Is the advisor's performance discussed with them constructively and regularly, not only raised as a concern when a specific incident occurs?	○	○	○	○	○	
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
Appointment Handling & Reception	/20			
Upselling & Estimate Explanation	/20			
Customer Communication	/15			
Job Card Accuracy & CSI Impact	/20			
OVERALL SCORE	**/75**			

Sign-Off

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

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Action Plan Tracker

Service Advisor Performance — Gap Closure Framework

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