Service Marketing

Audit Scorecard

A 15-point compliance assessment for service reminders, seasonal campaigns, lapsed customers, AMC, extended warranty, and conversion

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 Marketing 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 marketing audits should check the full funnel, not just campaign activation. Confirm that reminders are being sent AND that the response (appointment booked, customer re-engaged) is being tracked. A well-executed reminder programme that is not converting to bookings is a message or offer problem, not a volume problem — and the two require completely different interventions.

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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
SERVICE REMINDERS & SEASONAL CAMPAIGNS							
1	Is a service reminder process in place that contacts customers at the appropriate interval before their next scheduled service is due, using at least two contact channels?	○	○	○	○	○	
2	Is service reminder content personalised by vehicle model and last service date, rather than sending a generic reminder to all customers?	○	○	○	○	○	
3	Are seasonal service campaigns (e.g., pre-summer, pre-winter checks) planned and activated in advance of the relevant season, not reactively?	○	○	○	○	○	
4	Is campaign response rate (reminders sent versus appointments booked) tracked and used to refine future reminder timing and messaging?	○	○	○	○	○	
LAPSED CUSTOMER CAMPAIGNS							
5	Is a lapsed customer segment defined and maintained in the DMS, identifying customers with no service visit within the defined lapse period?	○	○	○	○	○	
6	Is a dedicated outreach programme for lapsed customers in place, using a distinct offer or message appropriate to a re-engagement context?	○	○	○	○	○	
7	Is lapsed customer outreach tracked to capture reason for lapse where possible (competitor, vehicle sold, relocation, dissatisfaction)?	○	○	○	○	○	
8	Is lapsed customer recovery rate (returned customers as a proportion of those contacted) tracked and reviewed?	○	○	○	○	○	
AMC & EXTENDED WARRANTY PROMOTION							
9	Are Annual Maintenance Contract (AMC) or prepaid service plan offers actively promoted to eligible customers at the point of service delivery?	○	○	○	○	○	
10	Are extended warranty options proactively communicated to customers approaching or past the standard warranty expiry, not only when the customer asks?	○	○	○	○	○	
11	Is AMC and extended warranty take-up rate tracked per service advisor and reviewed to identify training or communication gaps?	○	○	○	○	○	
CAMPAIGN CONVERSION & REPORTING							
12	Is campaign conversion (enquiries or bookings generated from each campaign) tracked against	○	○	○	○	○	

	the number of contacts made?						
13	Is campaign cost-per-booking or cost-per-return-visit calculated, to allow comparison of campaign effectiveness across channels and offer types?	○	○	○	○	○	
14	Are campaign results reviewed by the service and marketing team together, with findings used to inform the next campaign plan?	○	○	○	○	○	
15	Is a rolling service marketing calendar maintained, ensuring campaigns are planned rather than executed reactively in response to volume shortfalls?	○	○	○	○	○	
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
Service Reminders & Seasonal Campaigns	/20			
Lapsed Customer Campaigns	/20			
AMC & Extended Warranty Promotion	/15			
Campaign Conversion & Reporting	/20			
OVERALL SCORE	**/75**			

Sign-Off

Auditor Name	
Auditor Signature	
Date	
Marketing Manager Name	
Marketing Manager Signature	
Next Audit Date	

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Action Plan Tracker

Service Marketing — Gap Closure Framework

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