Vehicle Personalization

Audit Scorecard

A 15-point compliance assessment for lifestyle understanding, usage profiling, accessory pack recommendations, customisation options, and customer confirmation

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 Vehicle Personalization 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: Vehicle personalisation is the highest-conversion accessory sales approach when done well — a recommendation that connects directly to the customer's stated lifestyle feels like advice, not upselling. The transition from 'You mentioned you go camping — have you considered the roof box and rubber boot liner?' to 'Would you like to add a roof box?' is the difference between a personalised conversation and a product push.

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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
LIFESTYLE UNDERSTANDING & USAGE PATTERN							
1	Does the sales consultant conduct a structured lifestyle and usage discovery conversation before presenting any personalisation options — understanding how the customer uses their vehicle, their family composition, and their interests?	○	○	○	○	○	
2	Is the personalisation conversation tailored to the customer's specific ownership context — distinguishing between urban commuter, family SUV user, outdoor enthusiast, or business driver — rather than presenting the same options to every customer?	○	○	○	○	○	
3	Is the customer's vehicle usage frequency, typical journey type, and any specific needs (towing, off-road, cargo carrying, child safety) recorded before a recommendation is made?	○	○	○	○	○	
4	Is the discovery conversation conducted naturally as part of the sales process, not presented as a separate accessory sales pitch that the customer can opt out of?	○	○	○	○	○	
RECOMMENDED ACCESSORY PACKS							
5	Are curated accessory packs available — grouped by lifestyle theme (Family Pack, Adventure Pack, Urban Pack, Business Pack) — making the recommendation process easier for the consultant and the decision clearer for the customer?	○	○	○	○	○	
6	Does the recommended pack offer a saving versus individual accessory pricing, providing a tangible incentive for the customer to choose the pack over individual items?	○	○	○	○	○	
7	Is the consultant able to explain the specific benefit of each item within the recommended pack relative to the customer's stated lifestyle, not just list the items by name?	○	○	○	○	○	
8	Are accessory packs configured for the specific vehicle model and specification — not offered as a generic cross-model pack that may include incompatible items?	○	○	○	○	○	
CUSTOMISATION OPTIONS & APPROVAL							
9	Are colour, material, and style options presented to the customer for accessories where choices are available — floor mats, seat covers, exterior styling accessories — rather than only the default option?	○	○	○	○	○	
10	Are lead times for customisation items that are not in stock clearly communicated, and is the	○	○	○	○	○	

	customer's approval to proceed obtained with the lead time understood?						
11	Is a personalisation quote document produced for every customer who selects personalisation items, itemising each accessory, its specification, and its price before approval is obtained?	○	○	○	○	○	
CUSTOMER CONFIRMATION & GOVERNANCE							
12	Is the customer's accessory selection confirmed in writing — signed quote or digital consent — before any accessories are ordered or fitment is scheduled?	○	○	○	○	○	
13	Is the approved personalisation specification attached to the vehicle order record, ensuring the correct accessories are ordered, fitted, and verified at delivery?	○	○	○	○	○	
14	Is personalisation conversion rate (customers who select accessories from the lifestyle conversation versus those who were only shown a standard catalogue) tracked and used to measure the effectiveness of the discovery approach?	○	○	○	○	○	
15	Is the personalisation approach reviewed and updated when new models launch or the accessory range changes, ensuring recommendations remain current and relevant?	○	○	○	○	○	
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
Lifestyle Understanding & Usage Pattern	/20			
Recommended Accessory Packs	/20			
Customisation Options & Approval	/15			
Customer Confirmation & 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

Vehicle Personalization — Gap Closure Framework

A structured four-stage workflow to assign, track, verify, and close Vehicle Personalization 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 Vehicle Personalization 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	Vehicle Personalization / 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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