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BEST PRACTICES FOR COMMUNICATING WITH DISCOVER BOATING PROSPECTS



PROSPECT MANAGEMENT PROCESS

A Note About the Importance of Lead Management Process

Lead Management is the process of nurturing and communicating with prospects. What's the ultimate goal? To see them convert to a new and satisfied customer.

Your sales pipeline and your ability to hit revenue targets all begin with good lead management. We invite you to try these best practices for improving your lead management efforts. Our goal is to help you develop a plan to nurture these prospects over time so you can move them through the buying cycle until they're ready to make their purchase decision. It's important to remember that many prospects generated via Discover Boating campaign are new to boating and require several touch points and follow-up activity. A large number of these prospects have a purchase horizon time of 1-3 years so you will want to make a good first impression and keep your brand fresh in their minds until they buy.



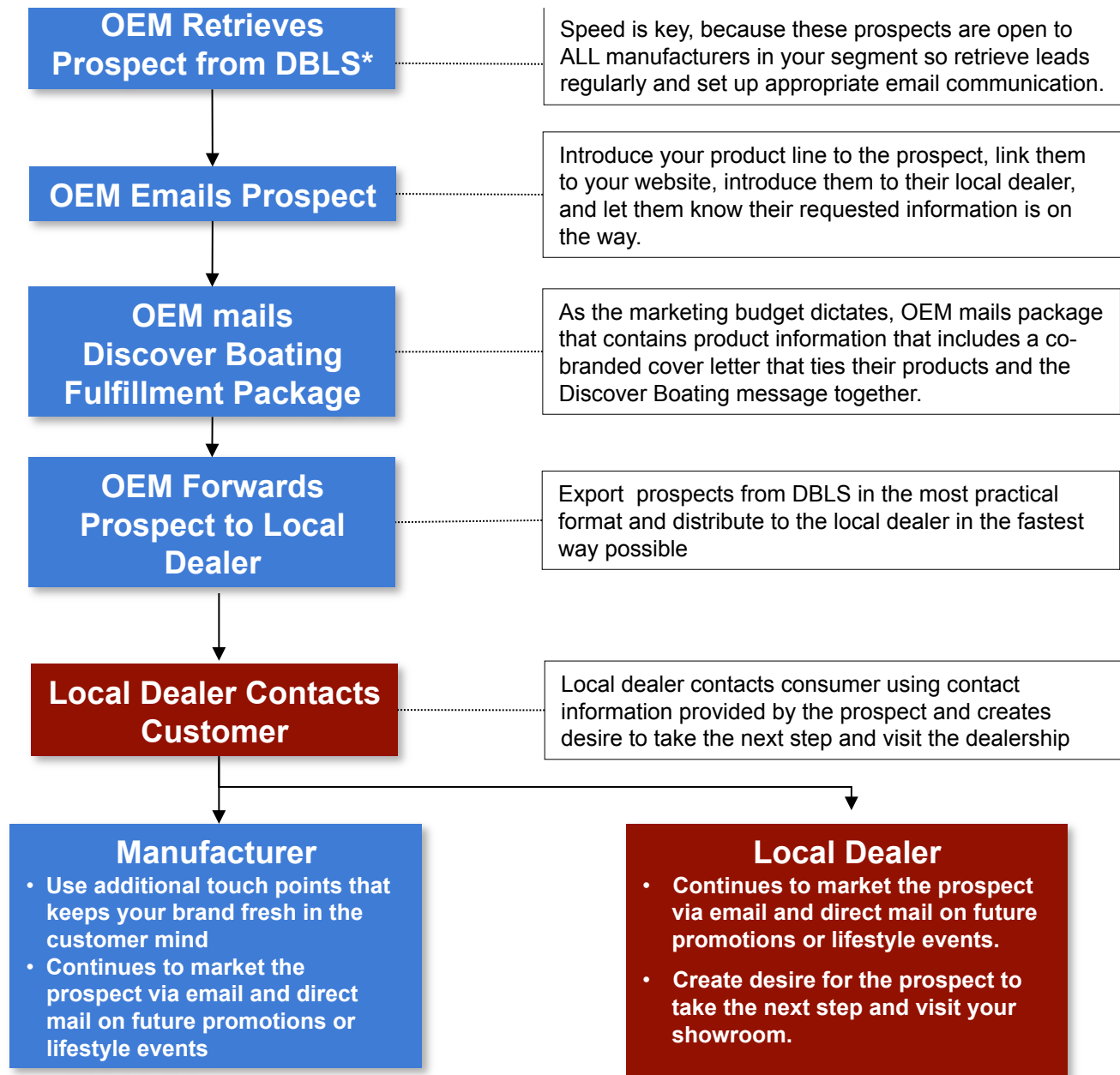
PROSPECT MANAGEMENT PROCESS

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PROSPECT MANAGEMENT PROCESS



IMPORTANT!!!

It is important to note that prospects generated via Discover Boating campaign are new to boating and need a lot of nurturing and follow-up. A large number of these prospects have a purchase horizon time of 1-3 years so you will want to make a good first impression and keep your brand fresh in their mind with multiple touch points.



PROSPECT MANAGEMENT PROCESS

Checklist for setting up your Initial Email Template (manufacturer version)

- ☐ Thank the prospect for visiting Discover Boating Website – hope they found the website useful
- ☐ Introduce your product line
- ☐ Link them to your website for complete information on your boats
- ☐ Introduce to their local dealer by linking them to the dealer locator section of your website to find their local dealer
- ☐ Let the prospect know that their requested information is on the way (if sending fulfillment package)
- ☐ Include Discover Boating language to tie your message with Discover Boating – *Welcome to the Water!*
- ☐ Include Discover Boating/Welcome to the Water logo

IMPORTANT!!!

It is important to note that prospects generated via Discover Boating campaign are new to boating and need a lot of nurturing and follow-up. A large number of these prospects have a purchase horizon time of 1-3 years so you will want to make a good first impression and keep your brand fresh in their mind with multiple touch points.




PROSPECT MANAGEMENT PROCESS

Checklist for setting up your fulfillment package

(manufacturer version)

The Discover Boating prospect was offered and is expecting additional information on the category of boats that they selected. Therefore, it would be appropriate to include brochures and other materials to help your boats stand out in the crowd. Some manufacturers have smaller, less expensive brochures printed for this type of prospect.

In addition to your printed materials, include a unique Discover Boating Cover Letter that includes:

- ☐ Co-Branded with Discover Boating to tie your points with Discover Boating's messages
 - ☐ Preview and download Discover Boating logos at GrowBoating.org under the  [Order Discover Boating Materials](#)
- ☐ Include Discover Boating language to tie your message with Discover Boating – *Welcome to the Water!*
- ☐ Include your website address to find additional information
- ☐ Include consumers' local dealer information
- ☐ Suggest consumers visit or contact their local dealer to experience boating first hand



PROSPECT MANAGEMENT PROCESS

A note to Dealers receiving Discover Boating leads

In order to engage this prospect it would be useful to know why and how this lead arrived at your dealership.

Because of the Discover Boating Marketing and Advertising efforts, the prospect found their way to DiscoverBoating.com. While browsing the website and discovering different types of boats these customers are offered a “*Get started in Boating*” DVD and additional materials from the manufacturers on the category of boats they selected.

The lead has arrived at your dealership by one or two paths. The lead could have been forwarded to you by your manufacturer or if your dealership is Marine Five Star certified, you might have retrieved the lead directly from the Discover Boating Lead System.

If this lead was forwarded to you via your manufacturer, there are a couple of things that your should know about the lead fulfillment of this lead prior to your receipt.



The Discover Boating DVD has been sent directly to the customer from Discover Boating



A information package should have been sent from your manufacturer (check with your manufacturer on their fulfillment process)

Now at this point, **your part of the process is to contact this customer using the contact information provided by the prospect and create desire for the prospect to take the next step and visit your showroom.**

We have included an email or letter suggestion for your use at the dealership. You can draft your own based on this example.



PROSPECT MANAGEMENT PROCESS

Checklist for setting up your Initial Email Template (Dealer Version)

Simple (text only): Can be sent from DBLS

- ☐ Thank the prospect for visiting Discover Boating Website
- ☐ Communicate the benefits of owning a boat
- ☐ Introduce your product line
- ☐ Let the prospect know that their requested information is on the way (if OEM is sending fulfillment package)
- ☐ If you are offering an on-water demos, invite them to participate
- ☐ Include Discover Boating language to tie your message with Discover Boating – *Welcome to the Water!*
- ☐ Include your contact information

Additional steps for Rich Text or HTML (including images)

- ☐ Use external email campaigning tool to create image rich email that promotes boating and your brand

IMPORTANT!!!

It is important to note that prospects generated via Discover Boating campaign are new to boating and need a lot of nurturing and follow-up. Please note: these prospects express an interest in boat types and may not know brands. So be mindful of that in your communication.



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PROSPECT MANAGEMENT PROCESS

Sample letter/email

Discover Boating Request w/ Phone Number

[Insert Dealer Logo]

Hello **CUSTOMER NAME**,

Thank you for visiting DiscoverBoating.com. The materials you requested are being shipped directly by DiscoverBoating.com or our manufacturer. As you most likely gathered from their site, boating is a great way to escape the stresses of everyday life; reconnect with family, friends, and loved ones; and replace the things you have to do, with what you want to do.

As your local **BRAND(s)** boat dealer, I would like to introduce our products and services to you and share with you all that the boating lifestyle has to offer. To answer any questions you may have about local boating destinations and activities, our products and services, pricing, and even finance terms which make owning a boat more affordable than most people realize, I will call you **TIME BLOCK**. If you would like to speak with me in the meantime, you can reach me directly at **DEALERSHIP PHONE**. You can also view our new and used inventories, and get more information about our dealership by visiting our Website at www.DealersWebsite.com.

Here at **DEALER NAME**, we're passionate about the boating lifestyle and look forward to helping you get out on the water in your new or used boat quickly and easily.

Sincerely,

SALESPERSON SIGNATURE

For Thought Starters Only

Remember that several manufacturers and dealers will be contacting this prospect. So please add your dealership's personality to these suggested letters so the prospects don't receive the same letters or emails.



PROSPECT MANAGEMENT PROCESS

Sample letter/email

Discover Boating Request w/out Phone Number

[Insert Dealer Logo]

Hello **CUSTOMER NAME**,

Thank you for visiting DiscoverBoating.com. The materials you requested are being shipped directly by DiscoverBoating.com or our manufacturer. As you most likely gathered from their site, boating is a great way to escape the stresses of everyday life; reconnect with family, friends, and loved ones; and replace the things you have to do, with what you want to do.

As your local **BRAND(s)** boat dealer, I would like to introduce our products and services to you and share with you all that the boating lifestyle has to offer. To answer any questions you may have about local boating destinations and activities, our products and services, pricing, and even finance terms which make owning a boat more affordable than most people realize, I would like to follow-up with you by phone. If you would feel comfortable in sharing it with me, would you provide me with the best phone number and time of day for me to reach you? If you would like to speak with me in the meantime, you can reach me directly at **DEALERSHIP PHONE**.

You can also view our new and used inventories and get more information about our dealership by visiting our Web site at www.DealersWebsite.com.

Here at **DEALER NAME**, we're passionate about the boating lifestyle and look forward to helping you get out on the water in your new or used boat quickly and easily.

Sincerely,

SALESPERSON SIGNATURE

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PROSPECT MANAGEMENT PROCESS

Sample Letter/Email for Marine Five Star Certified Dealers

[Insert Dealer Logo]

Hello CUSTOMER NAME,

Thank you for visiting DiscoverBoating.com and congratulations for taking the next step toward enjoying the boating lifestyle.

As your local BRAND(s) boat dealer, I would like to introduce our products and services to you and share with you all that the boating lifestyle has to offer. To answer any questions you may have about local boating destinations and activities, our products and services, and even finance terms, you can reach me directly at DEALERSHIP PHONE.. You can also visit our Web site at www.DealersWebsite.com.

As Marine Five Star Certified Dealership, we have made a commitment to quality products and services. Marine Industry Dealer Certification is a new industry standards program developed in a cooperative effort by boat manufacturers, dealers, and engine builders. This industry-wide effort is to develop programs focused on delivering an excellent boating expertise. By achieving Certification, we have demonstrated that we are dedicated to providing our customers with a consistent and positive experience every time they visit our dealership. We care about your boating experience from purchase to service and beyond. Sincerely,

SALESPERSON SIGNATURE

For Thought Starters Only

Remember that several manufacturers and dealers will be contacting this prospect. So please add your dealership's personality to these suggested letters so the prospects don't all receive the same letters or emails.



PROSPECT MANAGEMENT PROCESS

Suggested Phone Track

1. Introduce Yourself	Hello, This is _____ form _____, may I speak with _____.
2. Purpose of the Call	Am I interrupting anything?
3. Check on DVD and OEM package	The reason I'm calling is because of your interest in boating through the Discover Boating website.
	Did you receive the <i>Getting Started in Boating</i> DVD?
	<input type="checkbox"/> Yes, Great! Did you get a chance to watch it? What did you think?
	<input type="checkbox"/> No, Sorry, It should be there soon... take the time to watch it, it is has some really great information
4. Boating Questions	Do you own a boat? Do you know someone that has a boat?
	I see from your inquire that you are interested in _____ type of boat, is that correct? Why?
5. Finding the perfect boat	<i>Continue conversation until you have an idea of what boat might fit their needs:</i>
	New or Used? Number of people?
	Length? Motor(s) I / O/ IO Hp _____
	Use: Skiing/boarding, Fishing, Entertaining, Cruising, High Performance, Swimming, Scuba, Family Fun
	Where: Saltwater, Lake, River
	Storage: Trailer, Private Dock, Marina
6. Invite to the dealership	I would like to invite you to the dealership to take a closer look at the boats and continue to answer any questions you have about boating is this week or next week better? Day Choice? Time?
7. Appointment	
8. Complete contact information	Additional Phone number _____ Complete address _____

Phone calls should be limited to those prospects who supply a phone number in the lead and indicate that they interested in purchasing a boat in the near team.



PROSPECT MANAGEMENT PROCESS

Suggested Voice Mail Message Track

1. Introduce Yourself	Hello, This is _____ form _____, sorry I missed you today.
2. Purpose of the Call	The reason I'm calling is because of your interest in boating through the Discover Boating website.
3. Check on DVD and OEM package	I wanted to check that your received your <i>Getting Started in Boating</i> DVD?
4. Offer to answer questions	If you have received it, I hope you had a chance to watch it... If you haven't received it yet... please take the time to watch it when it arrives, I think you will find it entertaining and it really has a lot of great information. Also I wanted to answer any questions you had about local boating destinations and activities, our boats and services.
5. Leave you phone number	Please give me a call at _____. If I don't hear from you soon, I will give you a call in a few days. Thanks and have a great day!

Phone calls should be limited to those prospects who supply a phone number in the lead and indicate that they interested in purchasing a boat in the near team.