

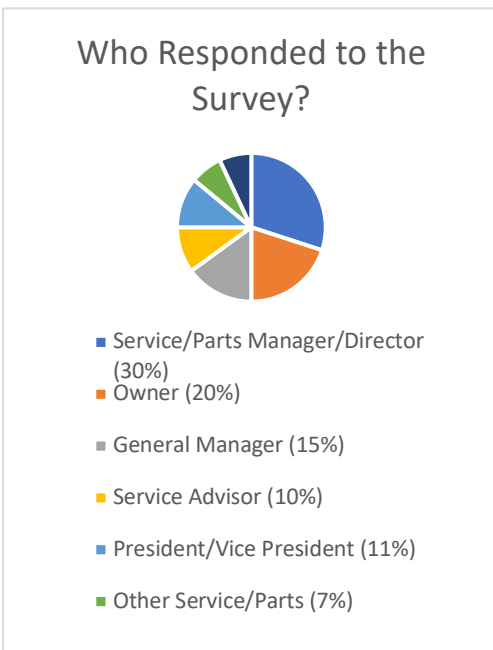


MRAA, VRZ Consulting Service Advisor Survey Results

The Marine Retailers Association of the Americas, in collaboration with Valerie Ziebron of VRZ Consulting, conducted an in-depth survey of marine dealerships. The survey sought to define some of the challenges that dealerships face in repairing boats more quickly, but more importantly to begin to define solutions for those challenges.

The idea for the study came out of a summer 2021 meeting the MRAA Executive Committee held with its colleagues on the National Marine Manufacturers Association Executive Committee. The two committees, including a sampling of dealers and boat and engine manufacturers, upon review of industry repair event cycle times, agreed that the marine industry should study the causes of longer-than-expected cycle times and work together to identify areas where the industry could reduce the cycle times and get boaters back on the water more quickly.

While the study’s goal was to secure 100 responses to this survey, in all more than 260 individuals responded, offering great insights into the topic. Here are the results of the survey:



How many techs per location?

Fewer than 3	24%
3-6 techs	60%
7-10 techs	11%
11-15 techs	2.7%
16-plus techs	2.3%

Another way to frame it:

177 with < 5 techs	68%
68 with 5-9 techs	26%
16 with >10 techs	6%

States/Provinces Represented by Survey:

A total of 45 states and provinces were represented in the survey, including the highest representation from Florida (21), Wisconsin (17), New York and Texas (16) and Minnesota (12). This represented a good mix of year-round boating vs. “winterization” states

What do you use for scheduling?

Dealer Management System	96
Calendar	29
Google	22
First come, first served	19
Outlook/email calendar	16
Paper	13
Excel/Spreadsheet	10
White board/poster board	12
Online calendar/scheduler (like Trello)	10

How far in advance do you schedule?

Less than week	7
1 week	16
2 weeks	52
3 weeks	27
1 month	46
5 weeks	1
6 weeks	15
2 months	14
3 months	2
6 months	9
8 months	2
1 year	4
16 months	1
Weeks	7
Months	6
Depends/varies/As needed	32
Do not schedule	12

Who sets the schedule?

Service Manager	95
Service Advisor	52
Manager & Advisor	48
Survey Respondent	24
Owner/Management	11
Service Department	6
Any/all of us	4
Other	4
Workload/Customer	3
Techs and Manager	3
Parts Staff	2



Who can see the schedule?

Everyone	161
All service	19
Writers/Management	16
Techs, Writers, Managers	11
Service Manager PLUS	7
Service Manager	7
Manager(s) and Service Dept.	6
Managers	4
All but Sales	3
All service and parts	3
Service Writer/Advisor	2

How long is the wait time for boats to be serviced in your shop?

Less than a week	49
One Week	44
Two Weeks	75
Three Weeks	31
1 Month	18
5 Weeks	7
6 Weeks	7
More than 6 weeks	4
Depends (No time frame given)	20



Are you doing anything to prioritize quick service job?

- 222 (86%) Prioritizing quick service jobs
- 37 (14%) Not prioritizing quick service jobs

What are you doing to prioritize quick service jobs?

- Allocate a set number of hours each day set aside for emergency work/special attention jobs. For example, “We leave 8 hrs a week open per tech. This way we can handle overruns along with any surprise issues on a delivery, etc.” Safety jobs get prioritized first.
- Work in hourly service/maintenance as they come in, or in a Quick Lane or Urgent Care style; Same day 20 hour service or 3 day annual service commitment; same day oil changes. One dealer has its service/parts staff set parts aside with RO #'s on dedicated shelving. Then the techs/mechanics are able to go to shelf & have parts ready to go. Similarly, batching or color coding similar jobs. Keep a service bay open for quick jobs. Some dealers are setting aside a full day for quick jobs, diagnosing, etc.
- Schedule diagnostics work in between other jobs to be able to allow time to order parts if needed. Diagnose the boat as soon as possible, targeting 24-48 hours. Leave gaps in schedule to allow for diagnostics, quick jobs. If there is a big job for the day we will put the smaller job beside the tech so if he is waiting on something that can get done. sometimes it works and sometimes it doesn't.
- Prioritize boats the dealership sold first, as well as boats under warranty, then people who regularly service with the dealership.
- Assign a dedicated technician to the quick jobs. Have a technician for oil changes/tire changes/ and other quick jobs. Have dedicated diagnostic technician and dedicated maintenance technicians
- Defer regular maintenance and cosmetic jobs in favor of boats that aren't running.
- Keeping more parts in inventory and having them ready to go when a boat is ready to get into the shop.
- Better scheduling and prioritizing — by drop off date, by type of job, etc. — was mentioned a lot. As was better communication of the schedule. Priority jobs are identified during the morning service meetings and work orders are coded to expedite parts and labor as necessary. Set next day jobs up in the evening for faster start in the morning.
- We offer a VIP concierge package for 20k a year which puts all of those customers on their own service list. they usually have a tech out within 48 hours



Are you doing anything to diagnose boats and order parts quickly?

Yes: 211 (81.5%)

No: 48 (18.5%)

If yes, what?

- Set goal to diagnose/triage boats within a set amount of time. Most responses, other than “as quickly as possible,” included within 24-48 hours, or within the first couple hours of the day. Some noted first thing in the morning and then again first hour after lunch are set aside for diagnostics. We also ask customers for pre approvals.
- Try to have the most common, standard service and repair parts in stock, otherwise, pre-order to the best of their ability and order locally when possible. At diagnosis, have someone check immediately if parts are in stock and/or get them ordered.
- Before the customer comes in for their scheduled appointment we get pictures, videos, and any other information to be sure we will have parts here and a technician ready to immediately fix the issue. Otherwise, collect as much information from the customers as possible. Can also look over work orders and pre-order known parts. Create a form for customers to fill out upon dropping off their boat, where the customer completes the inspection and notes specific components.
- Check boat serial numbers for service bulletins as well as historical service work on that boat.
- Improve the quality of the diagnostics and write-ups.
- Complimentary inspection on day of check in, at this time parts orders and warranty claims are submitted. We will also contact manufacturers when more info is needed to diagnose an issue before the tech sees it.
- Employing a dedicated parts person, or someone specifically to diagnose issues.
- Employing mobile technicians to diagnose before tow service is required.
- Improve communication internally, particularly between service and parts and sales for new boat set up.
- Creating a connection between the technician and the customer.
- It's a process to push those items thru system faster. I would guess we cost the customer time with not have better systems in place. We continue change policy to improve this. It's kind of a challenge as sometime its better to over book than under book
- Do a better job scheduling and setting appointments to schedule the diagnostics into the work flow.
- Keep the technicians fixing boat and have someone else conduct the diagnostics.
- Effectively training of front desk service staff can help expedite the process.



What are the most common repairs your shop performs?

Basic Service/Maintenance/Preventative	76 mentioned this
Water Pump (impellers)	55
Engine Repair	41
Fuel/Fuel System	40
Electrical System / Battery	36
Warranty Work	30
Winterization/Spring Make Ready	24
Hourly/annual service	23
Tune-Ups	23
Oil Change	22
Electronics	16
Fiberglass/Gelcoat	11
Ballast	11

What are the most common problems that make a boat unusable and keep customers off the water?

Availability of Parts	55 mentioned this
Engine Issues	54
Fuel Issues	42
Electrical Issues/Batteries	33
Fuel System	23
Lack of Preventative Maintenance	23
Impact Damage	20
Drive Issues	15
Overheat Issues	15

What parts or components that you must order take the longest to receive?

OEM/warranty parts	81 mentions
Everything	38
Engines/Engine Parts	37
Upholstery/Canvas	33
Accessories/Electronics	32
Fuel System	18
Electrical Components/Wiring	16
Props	13
Transmissions	10
Drives	10
Lower Units	10



What obstacles do you regularly face in completing repairs?

Parts Availability	186 mentions
Technician skill/availability	40
Communication with manufacturer	29
Time/efficiency issues	21
Diagnostic issues	17
Scheduling effectively	6
Additional/unknown problems	6
Customer Approvals	4
Internal Communications	4
Customer Communications	4
Subcontracting	4
Test driving	4
Older boats	4
Weather	3
Boats are difficult to work in	2

What would make your shop more efficient?

More/better techs/yard/laborers	102 mentions
Parts availability	79
More/better space	40
Manufacturer Communication/Support	20
Better scheduling	17
Better processes/efficiency	15
Service Advisor/Manager/Foreman	14
Team Communication	9
Better diagnostics	7
Training	7
Quality Control on New Boats	6
Customer Communications	6
Parts Staff	3
Quality Control on Service Work	2





Please rate the following statements from 1-5, based on your level of agreement with the statement, with: Strongly disagree (1) Disagree (2) Undecided (3) Agree (4) Strongly Agree (5)

We have been experiencing more service work than we can handle this year

1 Strongly Disagree	6
2 Disagree	65
3 Undecided	41
4 Agree	89
5 Strongly Agree	59

We need more support at the service counter

1 Strongly Disagree	18
2 Disagree	70
3 Undecided	56
4 Agree	77
5 Strongly Agree	40

We need more support at the parts counter

1 Strongly Disagree	15
2 Disagree	69
3 Undecided	53
4 Agree	83
5 Strongly Agree	40

We need more technicians

1 Strongly Disagree	5
2 Disagree	21
3 Undecided	29
4 Agree	84
5 Strongly Agree	122

New boats, straight from the manufacturer are requiring more warranty work

1 Strongly Disagree	3
2 Disagree	15
3 Undecided	17
4 Agree	83
5 Strongly Agree	143

Warranty approval is taking longer than normal

1 Strongly Disagree	6
2 Disagree	38
3 Undecided	53
4 Agree	76
5 Strongly Agree	87

I am feeling high stress and pressure at work

1 Strongly Disagree	12
2 Disagree	36
3 Undecided	51
4 Agree	88
5 Strongly Agree	73

Our service team is feeling high stress and pressure

1 Strongly Disagree	10
2 Disagree	33
3 Undecided	42
4 Agree	97
5 Strongly Agree	79

Our shop works well as a team

1 Strongly Disagree	0
2 Disagree	9
3 Undecided	22
4 Agree	109
5 Strongly Agree	120

Our dealership works well as a team

1 Strongly Disagree	1
2 Disagree	6
3 Undecided	33
4 Agree	120
5 Strongly Agree	101

Our dealership need to improve our internal communication

1 Strongly Disagree	9
2 Disagree	150
3 Undecided	59
4 Agree	116
5 Strongly Agree	43

Our dealership needs to improve our customer communication

1 Strongly Disagree	8
2 Disagree	47
3 Undecided	42
4 Agree	124
5 Strongly Agree	40

We look at our Open Report Order list regularly

1 Strongly Disagree	2
2 Disagree	8
3 Undecided	19
4 Agree	125
5 Strongly Agree	107

We look at our parts on Order List regularly

1 Strongly Disagree	3
2 Disagree	17
3 Undecided	33
4 Agree	119
5 Strongly Agree	89

We pre-pull parts and stage work for the next day

1 Strongly Disagree	7
2 Disagree	33
3 Undecided	40
4 Agree	113
5 Strongly Agree	67

We don't pull techs off their current job to work on emergencies

1 Strongly Disagree	61
2 Disagree	114
3 Undecided	48
4 Agree	36
5 Strongly Agree	2

We effectively schedule bigger jobs for the slower season

1 Strongly Disagree	3
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2 Disagree	31
3 Undecided	38
4 Agree	139
5 Strongly Agree	50

We effectively schedule maintenance work and accessory upgrades for the slower season

1 Strongly Disagree	7
2 Disagree	53
3 Undecided	59
4 Agree	105
5 Strongly Agree	36

Our Sales dept is accepting trades that need a lot of work

1 Strongly Disagree	25
2 Disagree	59
3 Undecided	66
4 Agree	72
5 Strongly Agree	37



Would you care to elaborate on any of the topics in the list above?

- All of our employees work as a team to make things happen. You can't put off big repairs because we have a short season.
- Always room for improving communications, embracing educational opportunities and improving your processes/process maps.
- Because of the lack of support, the team is always stressed and running around. We need to find better ways to train employees.
- Being in Florida we do not have much of a slow season, it is more about balancing technician skill level to optimize larger jobs as they come. Additional support staff would be wonderful but unrealistic. We are a small company and only have so much room for bodies so we have to manage our time and space to make it work within our performance means.
- Boat and motor manufacturers do not pay a fair amount for warranty. Parts availability is very bad right now and always bad from boat manufacturers. It's impossible to have great service if you can't pay a competitive wage. Warranty is impossible and fixed margins on boats is draining the dealers.
- Boats-to-technicians ratio is extremely high. Manufacturers warranty and parts slow downs have affected the normal flow in the shop.
- Communication between sales and service can always improve.
- Communication in the dealership is tough when it's hard to communicate with manufacturers to find the help/answers we need. Most of the time we hear "we haven't run into that before" and then we talk to another dealer that has been through the same issue already.
- Customers are under the impression the whole world works off the "Amazon Prime" system. They feel everything should be completed next day. Instant gratification that people receive from Amazon next day delivery or social media instant "likes and comments" do not translate to busy service departments in the peak summer months.
- Emergencies must be dealt with as soon as possible.
- Finding Boat Technicians is an extremely tough task. Boats coming from the manufacturers are having more issues. All boat makers are manufacturing more boats each year and they get more and more technology inserted into them. This is causing a lot of stress on the service team! At a time when we are busier than ever, we need new boats showing up with fewer issues.
- I have worked as a dealer principal for the last 30 years and haven't ever worked more than 70 hours a week. I'm now pushing the 80-hour mark and can't still keep up with demand.
- I know this year has been different because of the huge level of freeze damages early on, which got us backed up, so we have been playing catch up for what feels like a year.
- I think service department does the best we can do. I think sales should pay attention to some of the trades they are bringing in - some need more work than they think.
- It is impossible to pull parts for repair jobs, if you do not know what's wrong with the unit being pulled in the shop. Some things are fairly common and you may be able to guess at some of the parts ahead of time, but unless it's a 100% common repair that comes together like a service school class, there will be surprises.



- It would help if [manufacturer] would ship parts on a timely manner.
- It's hard to pre-pull parts, without having someone look at the boat. In our shop, that's the technician, so it is a delay.
- Knowledgeable technicians with good work ethic are rare to find.
- Lack of Qualified Service Technicians is a problem for everyone at this time. The older techs are being over worked and no one seems to want to get into mechanics. Most younger kids hired at the dealership are a bust and don't last. People simply do not want to work hard.
- Maintenance and accessory upgrades are being demanded all year long, people do not want to wait for the off season.
- Manufacturer quality control is lacking.
- Many of our new boats come in from manufacturers with lots of work needing to be completed. Getting approval from them takes forever and getting parts is near impossible.
- Most of our issues come down to the fact you can't find help that wants to work, let alone quality help you can trust to hand them a ticket and know the job will be done correctly the way the customer wants/expects.
- My biggest frustrations this year have been the poor quality of the boats coming in and the added frustrations with terrible communication with [manufacturer]
- New boats coming without engines installed, accessories missing, are slowing service department
- No trades to be had in the market
- Our biggest obstacles now are need for more qualified technicians, and long waiting times for certain parts. Supply chain problems seem to be the more difficult for us at the moment.
- Overall we do a great job. Any dealership that has a shorter season due to weather will have high stress periods over the boating season.
- People are putting lots of hours on their boat since pandemic and like everything else, more hours, more issues. I feel like we had more issues on brand new boats. Issues that we didn't see before. As we can't drive boats before re-delivering the boat, I feel like there are lots of complains that we can't confirm in the first place and way too often guess the issue. As we can't confirm our repair, we deliver back the boat without a test drive which creates a lot of frustration. Taking a boat to the lake for a test drive is a hassle as the lake is far, involves pulling it with a truck, dropping it down in the lake, driving it and pull it back on the trailer. Can't be done by a single tech and customer won't ever pay for all that time it would take.
- Poor & inefficient resources = less high-qualified staff. Less qualified staff = slow turnaround and unhappy customers. Poor quality new units = wasted time & money. Poor quality trade-ins = minimal support and wasted time and money. [Manufacturer] = stress/anger/hatred/BS/No \$/don't want to perform warranty work/unsupportive of dealers struggles/they don't listen.
- Poor weather has resulted in less usage of boats and a slower service department this season, especially compared to last year
- Quality of new boats from the factory is terrible across all lines. Also warranty claims are slow to pay and are denied for petty reasons. Manufacturers are finding ANY way to deny claims and customer satisfaction suffers greatly.
- Recruitment of trained techs is a huge challenge



- Sales does not communicate well with service in scheduling; they will put completion dates on contracts without consulting.
- Scheduling work is customer-driven. Are you going to tell you a customer they have a "big job" so we'll put it off so we can do other easier/higher volume work??
- I think all dealerships are facing record setting levels of demand and struggling to maintain a qualified workforce and the problems have amplified over the last 2 years in all the above.
- South Florida doesn't exactly have a slow season, would be nice to see some of the solutions have our unique situations in mind. We are performing trade evals and purposely buying these used boats that need work, but buying them right generates service revenue and additional sales revenue, with less headaches.
- Teamwork and communication is the most effective strategy in service, in-house and to guests.
- The boats with a lot of work that are being traded in have been thoroughly gone through and evaluated by the shop before being taken in on trade. We're aware of the work the boat needs before hand and have adjusted the trade in value accordingly. Those boats get focused on in the slow time to keep techs and detailer busy.
- The increase in sales over the past years has forced manufacturers to rush boats, resulting in more fixes at the dealer level. The amount of new boaters has also created a unique problem with lack of knowledge of maintenance required when owning a boat.
- There is more work out there than we can handle and end up turning some of the older stuff away.
- Very high pressure, customers are very very demanding and rude, we need more help.
- Warranty processes are time-consuming, and we are not fairly reimbursed from manufacturers. Time involved with administration, phone and paperwork for warranty is not covered at all.
- Warranty work needs to be profitable for marine dealership service departments. Flat rates for repairs should be obtainable- we do not see the repetition of opcodes nor consistency of component placement in boats to allow for low flat-rate times (e.g. many manufacturers rig boats different ways, run harnesses in most convenient way, consequently a veteran technician must "learn" the same repair for different boats but flat rate time is the same). Parts must be reimbursed to dealer at MSRP or "List" price, including parts in stock at dealer. This would effectively solve industry repair cycle times as we can afford to pay service admin staff more competitively (recruit and retain), pay technicians competitively (recruit and retain), consequently dealers will want that warranty service work and compete for it. When we compete for something the consumer inevitably wins. Please convince manufacturers to begin this process immediately and to put aside their fears that this will cause dealers to find "phantom" warranty work. Look at the powersports and auto industries. I'm sure it happens, but it is not prevalent. Unfortunately what brought these changes to the auto industry was legislation — surely we don't need that.
- We are trying to improve our customer communication with all the delays, and for the most part the customers are understanding, but some are just frustrated by life in general now and take it out on the staff - takes effort to keep a happy crew on those days!
- We as boat dealers need a better deal with manufacturers that is not one-sided that a manufacturer just can't up and cancel a dealer at a moments notice.
- We have noticed there have been a lot more warranty work needed on new boats that arrive. Missing parts on new boats. Timeframe to get missing parts through warranty.



- We could much better help our customers if we had the manpower. It is overwhelming having to multitask so many different jobs and customers. if we had time to focus on one thing at a time, a lot of our issues would go away.
- We experience a surge of business each summer. Parts, service and sales are stretched (and stressed) to the max. By pulling together as a team we are able to effectively service our customers.
- We have seen a huge number of used boats that have been purchased privately that have bogged our service department down. These are second-hand boats that are being seen for the first time by our service dept. Most have been neglected.
- We need a better internal OS to help with our communication internally and with customers.
- We never turn down a job, depending on the season. At the end of the day it is someone's boat that feels like theirs is just as important as the quick fixes. At our location there is no offseason.
- When the guys stick to our service process, we do things well! If one step is ignored, it's obvious where the breakdown occurs and we can immediately address it. Using a process for the last year has been a game changer for us! On another note we treat our boat buying customers like gold, and really don't take outside work unless it's a boat brand we are the dealer for, but even those customers are put after all if our owners! And charged a \$499 inspection fee before they can get service for the first time.
- Would love to see a marina that handles the insanity of pick ups and coordination of drivers and mechanical staff. The 2 are so essential.



In your experience, why is it taking longer than normal to get service boats back to customers?

Parts Availability	191
Technician Shortage/Experience	45
Increased Demand	31
Warranty Approval/Support	15
Multiple issues with boats	7
Complexity of new boats	5
Quality of new boats	4
Old Boats	3
Diagnostic time	3
Customer expectations	3
Poor processes	2

What could help your dealership get service boats back to customers more quickly?

Parts availability	109
More/Better Technicians	62
More/Better Employees	22
Manufacturer Support	14
Quicker Warranty Authorization	11
Training	7
More/Better space	7
Better Processes/Management	7
Effective Scheduling System	5
Internal Communications	5
New Boat Quality	4
Service Advisor	3
Customer Communications	2
Need more time	2