

Example Post-Sale Follow-Up



KEY

Salesperson Tasks

Dealership Tasks

**Customer is Indicated
"Delivered"**

Change status to sold or delivered in the CRM or use a manual method of triggering your Post-Sales Follow-Up Process.



**Next Day
Thank You Letter or
Handwritten Cards**

Print letters or handwritten thank you cards. Add a handwritten P.S. to printed letters.



**5-Day
Thank You Call**

Use a Post-Sale Follow-Up Script to help inspire conversation, continue building rapport and discover any post sales issues that need attention. Post notes in your CRM.



**15-Day
Manager Email or Letter
Introduction to Service**

Print letters for signature and mailing, and retain a copy of the note sent in your CRM.



**30-Day
Salesperson CSI Call**

Coordinate a call with the CSI survey delivery date and ask the boat owner to submit the survey. Add notes to the CRM. Salesperson schedules next contact in the CRM.



**Milestone
Calls & Letters**

Prints letters due. Add a handwritten P.S. to printed letters.
- 1st Year Anniversary
- 2nd Year Anniversary
- 3rd Year Anniversary



**Marketing
Direct Mail & Email
Campaigns**

Marketing personnel using CRM will keep the brand(s), dealership and salesperson fresh in the minds of customers promoting:
- Service
- Events
- Sales Promotions
- New Products
- Boat Shows