Post-Sale Follow-Up Worksheet

These Post-Sale Follow-Up tips and Standard Operating Procedure are excerpts from the Guide to Improving Your Sales Process Map, which is available through the Marine Industry Certified Dealership program.

Post-Sale Follow-Up — By now, you are waving goodbye to your customer as they drive away with their new boat you just sold them. You can take a breath and chalk up another sold unit this month, but you're not done with them yet.

This is truly the first step of selling the next boat to this customer or sooner to one of their friends or relatives. There is not a post-sale follow-up process that fits all; the touchpoints should be dictated by your relationship with the customer and your efforts on noting milestones in the customer's boating life and showing a sincere interest in them by following up on those events. That being said, there should be a few touchpoints required for all customers buying a new boat from the dealership and empowering the salespeople to schedule future follow-up. These immediate and mandatory follow-up points could be:

- Handwritten thank-you note
- 5-day phone call
- Email or letter from the Service Department
- 30-day CSI reminder call

These touchpoints should be tailored for each dealership with systems that ensure that each are completed.

Standard Operating Procedure Checklist

- [ ] Have you developed and published a Post-Sale Follow-Up process for your dealership?
- [ ] Do you empower your salespeople to schedule the next follow-up date after the required initial follow-up?
- [ ] Have you created a policy around your CRM that requires future scheduled follow-up?
- [ ] Have you developed guidelines to use your CRM as a coaching tool to look for your team completing the Post-Sale Follow-up and winning from the efforts?