**Yard Manager Planning Checklist**

**Yard Management**

* **Ensure Safe and Efficient Movement of Boats:** Oversee the hauling, launching, docking, and arrangement of boats on the dealership premises to ensure safety and efficiency.
	+ Develop maps and/or lists to track the location of boats on the lot.
	+ Define areas for sales and service boats that are separate.
	+ Acquire signage to inform customers of drop off, pick-up, parking and other areas.
* **Coordinate Transportation:** Manage the transportation of boats, trailers and motors to and from off-site locations, including customer locations and boat shows.
	+ Ensure that you have a system to track boats moved between locations that is kept up to date and accurate.
* **Maintain Yard Storage Needs:** Keep track of stands, blocks, covers, etc., ensuring they are available and in good condition.
	+ Plan for the storage in a location that keeps these items out of site of customers or establish regular checks to ensure that these items are neat and organized.
* **Schedule Maintenance:** Coordinate and schedule maintenance for yard trucks, trailers and forklifts; maintain accurate service records.
	+ Create notifications to track upcoming service intervals and safety checks on all equipment.
* **Monitor Yard Workflow:** Keep an eye on the overall flow of work in the yard and ensure all yard maintenance tasks are completed promptly.
	+ Establish a time to have updates on urgent issues at each daily yard meeting.
* **Supervise Yard Staff:** Plan a daily meeting with yard staff. Select the least intrusive but most effective time to share planning, events, concerns.

**Working with Sales and Service**

* **Facilitate Communication:** Act as a bridge between the sales and service departments, ensuring both are informed about the status and availability of boats.
	+ Provide time each day for conversations with sales and service managers.
	+ Build into the schedule for the day a cushion of time to handle unexpected sales or service issues.
* **Support Sales Efforts:** Work closely with the sales team to ensure boats are displayed attractively and are ready for showings or test drives.
	+ Plan a daily check of cleanliness and alignment of sales displays.
	+ Consider a daily checklist of sales boat display checking for water gathering on canvas, wind, or other weather concerns, docking, tire inflation and more.
* **Assist Service Department:** Coordinate with the service department to ensure boats are moved promptly for repairs or maintenance, minimizing customer wait times.
	+ Establish time for a daily discussion with service advisors or manager to ensure that service boats are accessible and clarify an order of events / repair boats for the current day and for the week.

**Supporting Customers**

* **Provide Excellent Customer Service:** Be approachable and available to answer customer questions regarding the yard, boat status or any other inquiries.
	+ Discuss and establish expectations for all yard staff interactions with customers
	+ Plan continuing checks to be performed by staff ensuring available parking and docking for customers.
* **Ensure a Pleasant Experience:** Maintain a clean, organized and welcoming yard environment that enhances the customer’s experience at the dealership.
	+ Work with leadership to develop parking, displays and signage that support customer access and a welcoming atmosphere.
* **Communicate Effectively:** Create specific information that impacts customer satisfaction and have this information available to all staff.
	+ Ensure that customer boats ready for pick-up are accessible and that all staff are informed of their location or can access information as to where the boat is located.
	+ Build a system to track customer concerns and / or safety issues and track those items through to correction.

**General Best Practices**

* **Maintain Professional Appearance:** Ensure the yard and its staff always present a professional image.
	+ Define a dress code working with leadership that applies to all yard employees.
	+ Develop and discuss best practices for customer interactions with staff.
* **Stay Process-Driven:** Develop and adhere to processes for all yard operations to ensure consistency and efficiency.
	+ The creation of processes will take time but will ensure success in each of the topic areas discussed.
* **Compliance and Safety:** Ensure all operations comply with relevant regulations and prioritize the safety of both staff and customers.
	+ Work closely with leadership to ensure that all processes are developed with regulations and safety in mind.
	+ Plan regular reviews of processes to adjust for regulation updates and/or staff changes.
	+ Schedule annual safety trainings and checks.