

# Draft Dealer Performance Review



Dealer: \_\_\_\_\_

Location: \_\_\_\_\_

**Scoring Criteria**

Very Unacceptable      Somewhat Unacceptable      Somewhat Acceptable      Very Acceptable  
 (1)      (2)      (3)      (4)      (5)      (6)      (7)

For any questions not scored a 7, please explain why you scored it the way you did.

**Please rate Dealer on the following Performance Categories:**

**Score**

**Comments**

**Customer Satisfaction Results:** Consider: CSI and Net Promoter scores (Initial and One-Year/Service Follow-Up); CSI tracking/trending and process improvement; Initiatives and processes to improve the customer experience.

**Professional Appearance:** Consider: Overall location cleanliness and maintenance (all customer facing-spaces); Appearance and cleanliness of showroom, boats and bathrooms, service and parts and accessories departments; Appropriate in-store manufacturer branding; Employee uniforms and name tags and in-store directional signage.

**Inventory Management:** Consider: Adequate floorplan capacity to meet mutually agreed upon boat order and stocking requirements, per dealer agreement; Meets or exceeds industry average inventory turns and inventory aging goals.

**Marketing Effectiveness:** Consider: Effective digital and print market representation; Effective sales and service marketing and promotional activities; Boat show or other event participation; Meets website branding standards; Social media effectiveness and monitoring; Adequate lead generation. Utilization of OEM resources.

**Sales Effectiveness:** Consider: Has a written, shared sales process; Meets mutually defined lead response times; Acceptable lead conversion rates; Written F&I processes and offerings; Customer Relationship Management System in place; Written, effective delivery process; Consistent customer follow-up; Follows guidelines related to territory for sales and service.

**Service and Parts Effectiveness:** Consider: Meets or exceeds Service CSI requirements; Takes ownership of the customer relationship and maintains continuous touchpoints; Has written, shared service and parts processes that ensure adequate service documentation; Prioritizes reducing Repair Event Cycle Times and invests in specialty tools to complete service work; Maintains adequate inventory of parts.

**Warranty Work Effectiveness:** Consider: Understands and upholds warranty coverage with customers; Responsiveness to warranty-related communications or repairs; Follows manufacturer warranty processes and responds promptly to service campaigns and recalls; Registers boats on time and reconciles warranty and parts accounts in a timely fashion; Shows true partnership with manufacturer.

**Training & Education and Dealer Portal Usage:** Consider: Salespeople, service management and technicians are properly trained; Attends manufacturer-provided training; Invests in additional management training/education; Earned necessary certifications; Effectively uses manufacturer's dealer portal.

**Operational Excellence:** Consider: Dedicated to continuous improvement efforts; Process-driven operations; Performance-driven, engaged staff; Is aware of and adapts to industry trends; Effectively leverages technology to improve business systems.

**Market Share:** Consider: Awareness of competitive pressures and understands competitor activity; Maintains adequate inventory per program requirements and to meet agreed upon market share levels; Creates plans with manufacturer to increase market share.

**Total Possible:** \_\_\_\_\_      **Total Score:** \_\_\_\_\_      **Percentage:** \_\_\_\_\_

Scored By (print name): \_\_\_\_\_      Signature: \_\_\_\_\_      Date: \_\_\_\_\_

**Action Ideas**