

## Company Data

1. Full dealership name: (As you would like it to appear in print):
2. Street address:
3. City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_
4. Your full name:
5. Title:
6. Telephone: \_\_\_\_\_ 7. E-mail: \_\_\_\_\_ 8. Fax: \_\_\_\_\_
9. Alternative contact: Name: \_\_\_\_\_ E-mail: \_\_\_\_\_
10. Your Web address:
11. What is the total number of sales, service and/or marina locations (including satellite locations) that you have? Please include the total number.
12. Describe your location(s) (On the water, in town, on a major highway, square footage, etc.) and please submit photos of the outside and inside of your store(s), service areas, etc.
13. What year was your company founded?
14. Current number of employees:
 

	Full time	Part time
Sales	_____	_____
Service	_____	_____
Rigging	_____	_____
P&A	_____	_____
Office	_____	_____
Marina	_____	_____
F & I	_____	_____
Rentals	_____	_____
Storage	_____	_____
Delivery	_____	_____
Other	_____	_____
<b>Total</b>	_____	_____
16. Please select the new boat brands you offer.

AB Inflatables  
Absolute Yachts  
Albemarle  
Albin Boats  
Alumacraft  
Aqua Patio  
Avalon  
Axis  
Azimut Yachts  
Azure  
Baja  
Bass Cat  
Bayliner  
Bennington  
Bentley  
Berkshire Pontoons  
Blue Wave  
Boston Whaler  
Cabo  
Campion  
Caravelle  
Carolina Classic  
Carolina Skiff  
Carver  
Centurion  
Chaparral  
Chris Craft  
Cobalt  
Cobalt Yachts  
Cobia  
Colgate 26  
Correct Craft  
Cranchi  
Crest  
Crestliner  
Crownline  
Cruisers  
Donzi  
Duckworth  
Eastern  
Edgewater  
Everglades  
Formula  
Fountain  
Four Winns

G3  
Glastron  
Godfrey  
Grady White  
Grand Banks  
Gulf Coast  
Hacker  
Harris Flotebote  
Harris Kayot  
Hatteras  
Hunt Yachts  
Hunter  
Hurricane  
Hydrasport  
Industries-Kawartha  
JC Pontoons  
Jetcraft  
Jones Brothers  
K2  
Kawasaki  
Key West  
Larson  
Laser Performance  
Legend  
Leisure Pontoons  
Limestone by Medeiros  
Lowe  
Lund  
Malibu  
Manitou Pontoons  
Maritimo  
Marquis Yachts  
MasterCraft  
Maxum  
MB Sports  
Mercury Inflatables  
Meridian  
Mirrorcraft  
Misty Harbor  
Monterey  
Moomba  
Nautic Star  
Nautique  
Nitro  
Old Town  
Ovation

Palm Beach Pontoons  
Parker  
Parti Kraft  
Pathfinder  
Polar  
Polar Kraft  
Premier Pontoons  
Princecraft  
Princess Yachts  
Pursuit  
Rampage  
Ranger  
Regal  
Rinker  
Riviera  
Robalo  
Sailfish  
San Pan  
Sanger  
Scout  
Sea Chaser  
Sea Force IX  
Sea Fox  
Sea Hunt  
Sea Ray  
Sea-Doo  
Shallow Sport  
Silverton  
Skeeter  
South Bay Pontoons  
Southwind  
Starcraft  
Steiger Craft  
Stingray  
Striper  
Sunesta  
Sunfish  
Sunseeker  
SunTracker  
Supra  
Sweetwater  
Sylvan  
Tahoe  
Tiara  
Tigé  
Tracker

Triton  
Triumph  
Trophy  
Viking  
Wakecraft  
Wellcraft  
Yamaha Jet Boats  
Yamaha Watercraft  
Zodiac  
Other (Fill in the blank)

17. Please select the new engine brands you offer.

Bombardier  
CAT  
Crusader  
Cummins  
Detroit Diesel  
Evinrude  
Honda  
Ilmar  
Indmar  
Johnson  
Kohler  
Lenco  
Man  
Marine Power  
Mercury High Performance  
Mercury Mercruiser  
Mercury Outboard  
Motorguide  
MTU  
Nissan/Tohatsu  
Onan  
PCM  
Pleasure Craft  
Ray Electric  
Rotax  
Suzuki  
Tohatsu  
Torqueedo  
Volvo Penta  
Westerbeke  
Yamaha  
Yanmar  
Other (Fill in the blank)

18. Other products and/or services you offer:

Boat and engine service  
Boat club  
Boat consignment  
Boat documentation services  
Boat lift sales  
Boat ramp  
Boat rental  
Boat surveying  
Boat towing  
Boat transport  
Boater education classes  
Bottom painting  
Canoe and kayak sales  
Canvas shop  
Captain's services  
Clothing/apparel sales  
Cottage rentals  
Detailing  
Dock sales  
Dry storage  
Electronics installation and service  
Fiberglass/gelcoat repair  
Finance  
Fuel  
Insurance  
Marina  
Mobile service  
Parts & accessories  
Pre-owned boat sales  
Restaurant  
Sail repair  
Ship's store  
Shrink wrap services  
Ski/wakeboard school  
Trailer storage  
Watersports shop  
Winter storage  
Wood working  
Yacht brokerage

Yacht club  
Other (Fill in the blank)

19. What type of dealer management system(s) do you use?

ADP Lightspeed  
BIT Marine Software Inc.  
DockMaster Software (Exuma Technologies Inc.)  
Huggins Outboard Computer Programs Inc.  
Integrated Dealer Systems  
Lanier Dealership Consulting LLC  
Nautical Software Solutions  
NizeX Inc.  
Spader Business Management  
Systems 2000 Inc.  
Total Control Software Corp.  
Wallace Software Design  
Other (Fill in the blank)

20. Do you have an organizational chart that reveals the structure of your company and/or each of your departments? If so, please include it.

21. Please list the association(s), 20 Groups, dealer councils, etc. that you belong to and the role you play within them.

22. What did you do in 2011 to improve and/or change your business? When possible, please include the results of each improvement.

23. What are the short-term and long-term goals for your company (metrics, sales growth, strategy, expansion, new product lines and services, etc.)?

24. How many of your facilities are certified through the Marine Industry Certified Dealership Program?

25. Please list ALL 2012 company and personnel certifications and accolades.

## **Sales and Profits**

**REMINDER: If you select “NFP” anywhere on this application form, we will not publish the number or information you provide in relation to that NFP. However, you must provide the information or number for the purpose of evaluation.**

1. Do you have a written business plan? If so, please include a copy. If not, please explain how you plan for the future success of your business.
  
2. As it concerns your dealership’s budgetary process, please explain: a. the methods you use to establish a budget; b. how you forecast; and c. how often you review actual results vs. your budget.
  
3. What was your total revenue for 2012? \_\_\_\_\_ NFP
  
4. What percentage increase or decrease does this represent over 2011? \_\_\_\_\_  
(select either increase or decrease)
  
5. What percentage of revenue do the following departments account for?  
 Sales % \_\_\_\_\_ NFP  
 Service % \_\_\_\_\_ NFP  
 Rigging % \_\_\_\_\_ NFP  
 Finance & Insurance % \_\_\_\_\_ NFP  
 Parts & Accessories % \_\_\_\_\_ NFP  
 Storage % \_\_\_\_\_ NFP  
 Rentals % \_\_\_\_\_ NFP  
 Marina % \_\_\_\_\_ NFP  
 Restaurant % \_\_\_\_\_ NFP  
 Other % \_\_\_\_\_ NFP  

**% Total must equal 100**
  
6. How many units did you sell for each category?  
 New I/O boats \_\_\_\_\_ NFP  
 New outboard boats \_\_\_\_\_ NFP      Used I/O boats \_\_\_\_\_ NFP  
 New inboard boats \_\_\_\_\_ NFP      Used outboard boats \_\_\_\_\_ NFP  
 New sail boats \_\_\_\_\_ NFP      Used inboard boats \_\_\_\_\_ NFP  
 New outboards \_\_\_\_\_ NFP      Used sail boats \_\_\_\_\_ NFP  
 I/Os for re-power \_\_\_\_\_ NFP      Used outboards \_\_\_\_\_ NFP
  
7. What was your gross profit margin (as a percentage) for boats in 2012?  
 \_\_\_\_\_ NFP  
 For service (as a percentage)? \_\_\_\_\_ NFP  
 Overall (as a percentage)? \_\_\_\_\_ NFP
  
8. What were your total operating expenses as a percentage of sales in 2012?  
 \_\_\_\_\_ NFP



9. What was your net profit as a percentage of total revenue in 2012?  
\_\_\_\_\_ NFP
10. How many times did you turn your new unit inventory in 2012? \_\_\_\_\_  
How many times did you turn your used unit inventory in 2012? \_\_\_\_\_
11. What is your strategy for managing inventory turns?
12. Are you current with all of your lenders? If not, please explain.
13. Explain how you incorporate F&I products/services into your business, including the products you offer.
14. What was the profit margin of your F&I department?
15. In 2012, what sales strategies were most effective for your dealership and why?

## **Service and Customer Satisfaction**

1. How do you track and use technician efficiency to operate your service department?
2. How do you compensate technicians and what, if any, aspects of their job performance do you further reward them for?
3. What is your service department's average technician efficiency (how many billable hours per technician hours)?
4. Does your dealership use a scheduling and dispatching system? If so, how does it work and what does it include?
7. Please provide the 2012 results of all customer satisfaction and loyalty surveys (including customer satisfaction index (CSI) scores for all brands you sell and service, as well as net promoter scores (NPS), if applicable). \_\_\_\_\_  
(Please remember to provide documentation).
8. What is your strategy for improving or maintaining your customer satisfaction scores?
9. What process do you use to deliver new and/or pre-owned boats? (On or off water? Tools you use? Who delivers the boat, trains the customer? Etc.)

10. What type of additional (ON- and OFF-WATER) training opportunities do you provide customers?

## Training and Education

1. Explain the types and frequencies of training opportunities you offer employees in each department:  
Sales:  
Service:  
Rigging:  
Parts & Accessories:  
Finance & Insurance:  
Management:  
Boat delivery:  
Office personnel:
2. Do you budget for training?  Y or  N What did you spend on training in 2012, not including travel and salaries?
3. What types of incentives and recognition do you offer employees for outstanding performance?
4. Please explain the types of benefits packages you offer employees (types, contributions, etc.).

## Marketing

1. Describe your 2012 business development and marketing plan strategy (i.e. types of media used, frequency, content, etc.). If you have a written marketing plan, please include it.
2. What percentage of your sales did you budget for advertising and marketing?
3. How do you research the needs and desires of boating consumers in your area?
4. How do you track the return on investment of your marketing and advertising dollars?
5. What percentage of your new boat sales are made at boat shows?  
\_\_\_\_\_ % of units  
\_\_\_\_\_ % of dollars
6. What is your strategy for boat shows and how is it evolving? If you do not display at boat shows, please explain why.

7. Please list and describe your in-store and/or community-related events.
8. What special promotions do you use to encourage customers to do business with your dealership? Please specify promotions used for all revenue centers: service, storage, parts, accessories, marina, F&I, etc.
9. How do you use your website, social media, email, mobile technology, and other online resources to build sales, traffic and your brand awareness?
10. Describe your lead-fulfillment process from the time a lead arrives to the time it is converted to a sale. Please include processes for in-store, online and phone leads (dedicated person, response time, etc.).
11. What sets you apart from your competition?