
Marine Salesperson's Organizational Planbook

A Complete System
for Organizing
Your Day



INSTRUCTIONS

Welcome to the expanded edition of the **Marine Salesperson's Organizational Planbook**. For those familiar with the original edition, please note that all categories remain the same, however, some have been expanded and relocated to the back of the book. In addition, a statistics section has been added to help you plot the growth of your business.

Today's Goals

Each morning, write down the number of Ups, Sales, Deliveries, Follow-Up Calls, Prospect Calls, and Mailouts you intend on making that day.

Today's Totals

At the end of each day, record the actual results of your efforts.

Things To Do List

List all of the tasks you need to accomplish for that day. Remember to transfer all unfinished business from previous days. Once each task is completed, note its completion by striking through with a yellow highlight marker. This allows you to view the tasks you've completed.

Phone-Ups

Record all of the Phone-Ups and nature of call you receive that day. Review this list often and follow-up for the purpose of setting appointments and making sales.

Follow-Ups

List all of the Follow-Up Calls you need to make that day, and purpose for calling. Then make a notation if your call was successful, and when you need to follow-up again.

Appointment

Record all appointments you've scheduled along with a phone number in order to confirm the appointment.

Ups

Record the names and purpose of visit of all new prospects that visited the dealership.

Want List

List all boats requested by customers that are not part of your current inventory and review this list often. In addition to doing a locator search, make a practice of taking this list with you when you take your daily inventory walk.

Prospect Calls

A steady number of prospect calls should be made daily in order to increase your client base. Although prospecting is never easy, the more calls you make, the easier it becomes. Develop a script to help make your calling easier and more accepting to the prospect.

Mailouts

Mailouts are a great source for introducing yourself and keeping your name alive with future prospects and current customers. Make sure you record each Mailout including routine paperwork.

Customer Log

In addition to recording the sale, make certain you've recorded all other pertinent information about the customer before he/she takes delivery. This will allow you to develop future business, and give you more information for following-up.

— Instructions continued on reverse side —

INSTRUCTIONS

Statistics

The Statistics section of the planbook will help you predict how to increase your sales and profits. By mathematical tracking each month, you can determine where improvement or enhancement needs to take place. Follow this step-by step process:

1. Fill in the dates at the top of the Weekly Statistics sheet.
 2. Record each day's activities and source of business.
 3. At the end of each week, total all of the categories.
 4. Transfer the weekly totals to the corresponding week on the Weekly Statistical Summary sheet.
 5. At the end of the month, total the categories.
 6. Transfer the totals to the Monthly Statistical Summary sheet.
 7. Calculate the Closing Ratios, Total Commissions, and Gross Averages.
 8. Plot Total Monthly Deliveries and Commissions on the respective graphs, bringing forward Totals from the previous months.
- If you want to increase your sales, it may be as easy as increasing your numbers.
 - Watch for discrepancies in each month regarding your sales and profits. If you notice your sales dropping, look to see where your statistics may be fluctuating and adjust them accordingly.

Date _____

Today's Goals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Today's Totals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Things To Do List

| | |
|-----------|-----------|
| 1. _____ | 13. _____ |
| 2. _____ | 14. _____ |
| 3. _____ | 15. _____ |
| 4. _____ | 16. _____ |
| 5. _____ | 17. _____ |
| 6. _____ | 18. _____ |
| 7. _____ | 19. _____ |
| 8. _____ | 20. _____ |
| 9. _____ | 21. _____ |
| 10. _____ | 22. _____ |
| 11. _____ | 23. _____ |
| 12. _____ | 24. _____ |

Date _____

Phone-Ups

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Appointment Date _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Appointment Date _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Appointment Date _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Appointment Date _____

Follow-Ups

| Name | Phone | Reason |
|------|-------|--------|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

Date _____

Appointments

8:00am _____
8:30am _____
9:00am _____
9:30am _____
10:00am _____
10:30am _____
11:00am _____
11:30am _____
12:00pm _____
12:30pm _____
1:00pm _____
1:30pm _____
2:00pm _____
2:30pm _____
3:00pm _____
3:30pm _____
4:00pm _____
4:30pm _____
5:00pm _____
5:30pm _____
6:00pm _____
6:30pm _____
7:00pm _____
7:30pm _____
8:00pm _____
8:30pm _____
9:00pm _____
9:30pm _____
10:00pm _____

Ups

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

SAMPLE

Customer Log

Name _____
Spouse _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Date Delivered _____ Stock # _____
Gross Profit _____ Commission _____
Husbands Birthday _____
Wifes Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Anniversary _____
Other Vehicles in Household _____
Other Vehicles in Household _____

Name _____
Spouse _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Date Delivered _____ Stock # _____
Gross Profit _____ Commission _____
Husbands Birthday _____
Wifes Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Anniversary _____
Other Vehicles in Household _____
Other Vehicles in Household _____

Name _____
Spouse _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Date Delivered _____ Stock # _____
Gross Profit _____ Commission _____
Husbands Birthday _____
Wifes Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Anniversary _____
Other Vehicles in Household _____
Other Vehicles in Household _____

Name _____
Spouse _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Date Delivered _____ Stock # _____
Gross Profit _____ Commission _____
Husbands Birthday _____
Wifes Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Anniversary _____
Other Vehicles in Household _____
Other Vehicles in Household _____

WEEKLY STATISTICS

| DATE | MONDAY | TUESDAY | WEDNESDAY | THURSDAY | FRIDAY | SATURDAY | SUNDAY | TOTALS |
|-----------------------|--------|---------|-----------|----------|--------|----------|--------|--------|
| UPS | | | | | | | | |
| TOTAL SALES | | | | | | | | |
| DELIVERIES | | | | | | | | |
| COMMISSIONS | | | | | | | | |
| REFERRAL SALES | | | | | | | | |
| REPEAT CUSTOMER SALES | | | | | | | | |
| PHONE-UPS | | | | | | | | |
| PHONE-UP SALES | | | | | | | | |
| PROSPECT CALLS | | | | | | | | |
| PROSPECT CALL SALES | | | | | | | | |
| MAILOUTS | | | | | | | | |
| MAILOUT SALES | | | | | | | | |
| FOLLOW-UP CALLS | | | | | | | | |

SAMPLE

WEEK OF _____

WEEKLY STATISTICS

| | | | | | | | | | | | | | | | |
|------|--------------------|----------------------|-----------|------------|--|--|--|--|--|-------------------|-----------------|----------------------------|----------------------------|------------|--|
| DATE | GROSS PROFIT TOTAL | GROSS PROFIT AVERAGE | NEW BOATS | USED BOATS | | | | | | SERVICE CONTRACTS | ACCESSORY SALES | FINANCE CONTRACTS APPROVED | FINANCE CONTRACTS DECLINED | CASH DEALS | |
|------|--------------------|----------------------|-----------|------------|--|--|--|--|--|-------------------|-----------------|----------------------------|----------------------------|------------|--|

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|--|--------|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
| | Monday | | | | | | | | | | | | | | |
|--|--------|--|--|--|--|--|--|--|--|--|--|--|--|--|--|

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|--|---------|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
| | Tuesday | | | | | | | | | | | | | | |
|--|---------|--|--|--|--|--|--|--|--|--|--|--|--|--|--|

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| | Wednesday | | | | | | | | | | | | | | |
|--|-----------|--|--|--|--|--|--|--|--|--|--|--|--|--|--|

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| | Thursday | | | | | | | | | | | | | | |
|--|----------|--|--|--|--|--|--|--|--|--|--|--|--|--|--|

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| | Friday | | | | | | | | | | | | | | |
|--|--------|--|--|--|--|--|--|--|--|--|--|--|--|--|--|

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|--|----------|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
| | Saturday | | | | | | | | | | | | | | |
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| | Sunday | | | | | | | | | | | | | | |
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|--|--------|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
| | Totals | | | | | | | | | | | | | | |
|--|--------|--|--|--|--|--|--|--|--|--|--|--|--|--|--|

SAMPLE

WEEK OF _____

WEEKLY STATISTICAL SUMMARY

| DATE | Week 1 | Week 2 | Week 3 | Week 4 | Week 5 | Totals |
|----------------------------|--------|--------|--------|--------|--------|--------|
| GROSS PROFIT TOTAL | | | | | | |
| GROSS PROFIT AVERAGE | | | | | | |
| NEW BOATS | | | | | | |
| USED BOATS | | | | | | |
| | | | | | | |
| | | | | | | |
| SERVICE CONTRACTS | | | | | | |
| ACCESSORY SALES | | | | | | |
| FINANCE CONTRACTS APPROVED | | | | | | |
| FINANCE CONTRACTS DECLINED | | | | | | |
| CASH DEALS | | | | | | |
| | | | | | | |

SAMPLE

