

ULTIMATE MARINE

Customer Communication - Comms CRM Policy

Effective April 1, 2024

This SOP outlines the procedures and guidelines for utilizing Ultimate Marine's Customer Relationship Management (CRM) system effectively. The IQComms system serves as our central database for managing customer interactions, improving communication, and enhancing overall customer satisfaction. All points of communication listed below are expected to be completed in iQComms only.

All customer communication and activity must be trackable in Comms. Failure to adhere to this policy will result in the immediate suspension of all sales leads provided by Ultimate Marine.

Lead Management and Expectations

- Initial attempts to contact a lead is to be a **call** required during socially accepted contact hours of 8am-8pm. Outside of these hours, text and email is the preferred mode of contact. If a lead is assigned outside of these hours, that lead is to be contacted as the priority lead the following business day
- Sales agents are expected to make initial contact to their assigned leads within 15 minutes of receiving the lead. Failure to do so will result in the lead being reassigned to another sales agent
- If no phone number is provided, ask in the initial email for their phone number so a call can be arranged to make a personal connection and better assist the customer and their needs.
- Sales Reps are required to update their deals through the Comms workflow/columns as the deal progresses. All leads/deals must be placed in the proper workflow and have accurate information
- 15 Outbound points of contact with customers in your workflow must be made daily. Any lead found not contacted over 30 days (without supporting notes / documentation) will be reassigned to another sales agent. Mass email / text blasts to aging leads does not constitute proper followup. (Reassignment will be at manager's discretion)

Sales Pipeline Management

Required Fields in Contact Card

- First name / Last name
- Boat make / Model / Stock #
- Estimated Deal Value - (Required from "Quote Sent" on)
- Proper tags - Specifically your location, which is required for the review to be sent

Initial Contact (Day 1-5):

Your Responsibility

- **Call** - Attempt to call the customer within the first 15 minutes of receiving the inquiry.
- **Text:** If unable to reach via call, send a brief text message introducing yourself and expressing availability for a call to discuss further.
- **Email:** Simultaneously, send an introductory email introducing yourself and expressing availability for a call expressing interest in helping the customer with their needs.
 - **Apply TAG Contacted**

Follow up Contact (7 Days After): - (Notification reminder sent in Comms)

Your Responsibility

- **Call** - Attempt to call the customer again
- **Text:** If unable to reach via call, send another brief text message reintroducing yourself and expressing availability for a call to discuss further.
- **Email:** Simultaneously, send another brief email reintroducing yourself and expressing availability for a call expressing interest in helping the customer with their needs.

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Sincerely,

Kevin Cook

Kevin Cook - General Manager
Ultimate Marine Orlando Headquarters

Signature: John Cruz