

PROGRAM CHECKLIST

Brunswick Platinum Master Dealer Program



1. DEALERSHIP PLANNING

Requirement	Required Documentation
1.1 Dealership must have a Vision, Mission, and Core Values statement posted in a customer visible area that is reviewed and updated annually, as well as shared with and understood by employees	<input type="checkbox"/> Copy of dealership Vision, Mission and Core Values
1.2 Dealership must develop an overall plan and manage its growth by department using a forecasting process that's reviewed monthly against your annual budget forecast and includes feedback on variance.	<input type="checkbox"/> Copy of monthly forecast report
1.3 Dealership must have a long term business plan (three years minimum) that addresses local issues including sales, marketing, service, facility, personnel and capital needs that is developed and reviewed annually (If dealership is part of a larger organization, evidence of formalized local input to that organization's plan must be provided)	<input type="checkbox"/> Copy or proof of dealerships 3 year business plan
1.4 Mystery shop at least two competitors, comparing different stores facility, sales and service departments	<input type="checkbox"/> Provide copies of two competitive market comparisons comparing facilities, sale and service departments (this can be done in a variety of formats as a written summary or spread sheet comparison by item, may use a facility check sheet for the facility comparison etc.)
1.5 Dealership must have at least 8 ongoing cross merchandising strategies between sales, service and parts, to build sales between departments and improve overall customer satisfaction.	<input type="checkbox"/> Provide examples of the cross merchandising strategies by department.

2. CUSTOMER SATISFACTION SCORES

Requirement	Required Documentation
2.1 Commit to driving a measurable improvement in "Overall Dealer Satisfaction Rating" Sales CSI score and provide specific strategies for how you will achieve these improvements	<input type="checkbox"/> Provide copy of your dealerships current sales CSI (12 month rolling average) for 'Overall Dealer Satisfaction" score(s)and your target improvement goals for the next 12 months for all brands for which your dealership has CSI surveys
2.2 Commit to driving measurable improvement in "Likely to Recommend Dealer to Friends and Family" Sales CSI score for dealerships who use a Net Promoter Score and provide specific strategies for how you will achieve these improvements	<input type="checkbox"/> Provide Net Promoter Score current CSI sales 'Likely to Recommend Dealer to Friends and Family" most recent score and your dealership's target improvement goal for the next 12 months
2.3 Track and trend CSI reports for sales, use results to address CSI deficiencies in both scoring and response rates and maintain process and document actions taken	<input type="checkbox"/> Provide last 2 months CSI Sales track and trend reports. Provide Sales process improvement report/action plan that documents corrective action taken based on CSI reports over the last 12 months

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<p>2.4 Maintain a Brunswick, Mercury or manufacturer CSI program for Service</p>	<p><input type="checkbox"/> Provide CSI last 2 months reports for Service (Mercury, Brunswick or manufacturer)</p>
<p>2.5 Maintain track and trend CSI reports for Service, use results to address CSI deficiencies in both scoring and response rates and maintain process improvement reports and document actions take</p>	<p><input type="checkbox"/> Provide copy of last month's CSI service track and trend report</p> <p><input type="checkbox"/> Provide Service Process Improvement report/action plan that documents corrective action taken based on CSI reports over the last 12 months</p>
<p>2.6 Display Marine Five Star Dealer Consumer Bill of Rights in a consumer-visible area in the Dealership reviewed with customers and employees</p>	<p><input type="checkbox"/> Provide a picture of Marine Industry Bill of Rights prominently displayed in a consumer-visible area</p> <p><input type="checkbox"/> Describe how you review Marine Bill of Rights with customers and employee</p>

3. MARKETING PLAN REQUIREMENTS

Requirement	Required Documentation
<p>3.1 Have a marketing plan for all traditional and new media that builds customer awareness and retention, as well as helps meet monthly sales objectives</p>	<p><input type="checkbox"/> Provide copy of marketing plan.</p>
<p>3.2 Hold at 3 offsite event per year and maintaining an events calendar – posted in the showroom and service write-up area – that includes all scheduled events throughout the year</p>	<p><input type="checkbox"/> Provide proof of two off-site events and a marketing events calendar</p>
<p>3.3 Use substantial, ongoing e-marketing strategies as part of your marketing plan.</p>	<p><input type="checkbox"/> Provide samples of current e-marketing advertisement, promotions, events or special postings</p>
<p>3.4 Have an ongoing marketing presence on multiple leading social media sites such as Facebook and Twitter and someone who is responsible for maintaining and driving your social media marketing on a daily basis.</p>	<p><input type="checkbox"/> Provide sample of current month social media marketing and traditional postings and name of individual designated to maintain social media communications</p>
<p>3.5 Utilize both paid and organic search engine optimization so that customers looking for boats online find you first</p>	<p><input type="checkbox"/> Provide examples of paid and organic search engine optimization strategies used</p>
<p>3.6 Monitor and improve your online reputation with specific strategies for optimizing reviews on sites such as Google+ and Yelp, and tracking and responding to very positive or potentially negative customer postings and opinions about your dealership online</p>	<p><input type="checkbox"/> Provide examples of responses to online opinion postings and explain your reputation management optimization strategies</p>

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3.7 Monitor dealership brand average against national average	<input type="checkbox"/> <i>Discuss how you monitor your dealership brand average against the national average</i>
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4. WEBSITE REQUIREMENTS

Requirement	Required Documentation
4.1 Dealership website must contain current dealer logo, Brunswick appropriate logos, high quality boat images, dealer accolades, store and individual department hours of operation, contact information, boat inventory, customer email capabilities and a separate parts section;	<input type="checkbox"/> <i>Website must contain current dealer logo, Brunswick appropriate logos, boat images, dealer accolades, store and individual department hours of operation, contact information, boat inventory, customer email capabilities and a separate parts section</i>
4.2 Dealer posts Brunswick and Marine Certification logos on their website and includes a link to a website page explaining the programs and customer benefits	<input type="checkbox"/> <i>Website contains Brunswick and marine certification logos and has link to website page explaining the programs and customer benefits</i>
4.3 Website technical abilities - site must load properly in multiple browsers with content information linked, home button on every page, easy navigation, all pages functional with links to each manufacturer	<input type="checkbox"/> <i>Website loads properly in multiple browsers with content information linked, home button on every page, easy navigation, all pages functional with links to each manufacturers</i>
4.4 Website should be mobile optimized or have a plan to become mobile optimized in the next 12 months.	<input type="checkbox"/> <i>Provide screenshot of mobile site or plan to become mobile optimized</i>

5. LEAD MANAGEMENT REQUIREMENTS

Requirement	Required Documentation
5.1 Have a Customer Relationship Lead Management system in place with a process in place that tracks customer email and telephone contacts by volume, type, and source, as well as the actions taken.	<input type="checkbox"/> <i>Provide examples of the Customer Relationship Lead Management system</i>
5.2 Lead Management Process map must include process activities, action steps, and designated responsibilities; improvements are made as needed and maps are updated quarterly (may be integrated into sales process map)	<input type="checkbox"/> <i>Lead Management Process Map with process activities, action steps, designated responsibilities, quarterly review date and process changes are noted or color coded and shared with employees; map must include your internet process (may be integrated into sales process map)</i>
5.3 Provide a 12 month average of the total number of all leads you respond to versus the total number you receive and commit to measurable improvements to this average with specific strategies for how you will achieve these improvements.	<input type="checkbox"/> <i>Copies of Prospect Management Log (3 days)</i> <input type="checkbox"/> <i>Explain how you manage prospect information obtained and how you track actions taken and results obtained</i>

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<p>5.4 Provide the rolling 12-month average of your dealership's current email and phone lead response timing and your improvement goal for the next 12 months and provide specific strategies for how you will achieve these improvements.</p>	<p><input type="checkbox"/> Copies of Prospect Management Log (3 days)</p> <p><input type="checkbox"/> Explain how you manage prospect information obtained and how you track actions taken and results obtained</p>
<p>5.5 Show that your dealership at minimum provides a custom response to email and phone leads within the same business day or if the leads are received at the end of the day, are responded to by noon of the next business day.</p>	<p><input type="checkbox"/> Explain how dealership monitors lead response to ensure quality customer response (customer questions answered and responses motivate customer to act now)</p>
<p>5.6 Dealership must use a Floor Traffic Control Log that tracks volume, type and actions taken.</p>	<p><input type="checkbox"/> Provide copy of Floor Traffic Control Log</p>
<p>5.7 Identify an individual responsible for Grow Boating Leads; must be able to demonstrate access to leads</p>	<p><input type="checkbox"/> Identify individual responsible for accessing Grow Boating Leads</p> <p><input type="checkbox"/> Provide proof that you have registered for Grow Boating Leads; copy of dealership leads from Grow Boating website (2 days)</p>

6. SALES REQUIREMENTS

Requirement	Required Documentation
<p>6.1 Sales department managers plan, set objectives, track and report sales growth to dealer principal and sales team monthly.</p>	<p><input type="checkbox"/> Provide sample of manager sales growth report</p> <p><input type="checkbox"/> Describe how sales plan and tracking is shared with dealer principal and sales team</p>
<p>6.2 Sales Process map must contain process activities, action steps and designated responsibilities; improvements are made as needed and maps are updated quarterly</p>	<p><input type="checkbox"/> Sales Process Map with process activities, action steps, and designated responsibilities; quarterly review date and process changes are noted or color coded and shared with employees</p> <p><input type="checkbox"/> Maps must include turnover to business office and introduction to service</p>
<p>6.3 Salespeople must prospect daily using a formal prospecting process, with a Sales Manager monitoring the process for making cold calls, follow-up and prospect tracking daily</p>	<p><input type="checkbox"/> Provide a sample of salespersons daily prospect log</p> <p><input type="checkbox"/> Explain Sales Manager monitoring process or provide sample of Manager feedback notes/comments to sales personnel</p>
<p>6.4 Salespeople must be proficient in the use of the boats they sell and are able to operate them effectively</p>	<p><input type="checkbox"/> Explain how dealership ensures that salespeople are proficient in the use of the boats they sell and are able to operate them effectively</p>
<p>6.5 Dealership must have a consistent pricing strategy on all inventory that is clearly communicated and tracked for sales compliance</p>	<p><input type="checkbox"/> Explain dealership's pricing strategy and compliance tracking process</p>

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6.6 Provide adequate inventory to support customer requirements	<input type="checkbox"/> <i>Explain how inventory is maintained throughout the year</i> <input type="checkbox"/> <i>Copy of commitment report from Business Development Manager</i>
6.7 Dealership completes delivery check sheets for each sale	<input type="checkbox"/> <i>Sample of customer delivery check sheets</i>
6.8 All customers are given a product orientation on every boat/motor purchased including: product use, manuals, warranties, safe operation and a demo ride with a knowledgeable person using a delivery check sheet	<input type="checkbox"/> <i>Explanation of process for ensuring customers receive a thorough product orientation of every boat/product purchased (two examples of delivery Check sheets)</i>
6.9 Customers must be given an introduction and explanation of the service process	<input type="checkbox"/> <i>Explain how your dealership provides an introduction to and explanation of service to new and used sales customers</i>
6.10 Dealership monitors and ensures all the needs and concerns of the customer are addressed in an honest, professional and non-manipulative manner	<input type="checkbox"/> <i>Explain how you ensure customers are treated in an honest, professional and non-manipulative manner</i>
6.11 Dealership commits to driving a measurable improvement in finance and insurance penetration levels over the next 12 months	<input type="checkbox"/> <i>Provide your dealership's current F&I penetration level (rolling 12 months) and specific strategies for improvement</i>
6.12 Dealership must provide each customer with the opportunity to meet with a knowledgeable F&I representative, internal or external, to review all components of the financial package	<input type="checkbox"/> <i>Explain dealership's process to allow each customer to meet with a knowledgeable F&I representative</i>

7. SERVICE REQUIREMENTS

Requirement	Required Documentation
7.1 Service Process map must include service process activities, action steps and designated responsibilities; improvements are made as needed and maps are updated quarterly	<input type="checkbox"/> <i>Copy of Service Process Map with process activities, action steps, designated responsibilities, quarterly review dates and process changes are noted or color coded and shared with employees</i>
7.2 Service Manager tracks technician productivity and efficiency rates and demonstrates the ability to use information to counsel and coach service personnel	<input type="checkbox"/> <i>Copy of individual technician productivity and efficiency report (last month) ; explain how you use this information to counsel and coach service personnel</i>
7.3 Before work begins, the customer must be given an accurate quote of repair costs and anticipated completion time, their approval noted on the Repair Order and notified if costs will exceed estimate	<input type="checkbox"/> <i>Provide example of repair order showing work quotation; include process for notifying customer of additional costs 100% of time</i>

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<p>7.4 Service Manager must have developed and employed, on a daily basis, an appointment log outlining all anticipated customers (i.e., time in/time out, technician assigned, etc.)</p>	<p><input type="checkbox"/> <i>Copy of "next day" scheduled appointment log</i></p>
<p>7.5 Service Writer or delegate completes a courtesy inspection, identifying and noting on inspection form any existing problems beyond customer-identified repair requests; customer signs the form</p>	<p><input type="checkbox"/> <i>Provide two samples of completed courtesy inspection sheet</i></p>
<p>7.6 Technicians or designee must complete a Quality Assurance Inspection for all boats worked on and leave a written document with the boat owner outlining work completed and items inspected</p>	<p><input type="checkbox"/> <i>Description of quality assurance process; must provide sample of QA form used; must include customer signature (may be integrated into the service process map)</i></p>
<p>7.7 Dealership has a monitoring/ tracking process to ensure boats are ready when promised</p>	<p><input type="checkbox"/> <i>Provide copy of route sheet or other document that shows boat is ready when promised</i></p>
<p>7.8 Dealership has a process to track/monitor daily shop load and status of boats under repair</p>	<p><input type="checkbox"/> <i>Provide copy of document or daily log that tracks daily shop load and status of boats under repair, by technician and in/out time</i></p>
<p>7.9 Customers must receive repair progress updates, a complete explanation of all work performed and charges, sign that they understand and are satisfied with the quality of work performed on their boat. Customer must also be notified 100% of the time if any used, remanufactured or aftermarket parts were used.</p>	<p><input type="checkbox"/> <i>Describe process for repair progress updates, explaining repairs and charges to customers (may be integrated into service process map)</i></p> <p><input type="checkbox"/> <i>Provide copy of repair order with customer signature</i></p>
<p>7.10 Management must track comebacks for each technician and maintain a comeback log</p>	<p><input type="checkbox"/> <i>Provide copy of comeback tracking log</i></p>
<p>7.11 Dealership must have a process to monitor and complete Service Bulletins and federally mandated Recall Notifications</p>	<p><input type="checkbox"/> <i>Describe how Service Bulletins and federally mandated recall notices are retained and available or distributed to employees</i></p>
<p>7.12 Dealership must have attained Mercury Certified or Premier Service Level</p>	<p><input type="checkbox"/> <i>Provide copy of most recent Dealer Service Level Scorecard</i></p>
<p>7.13 All subcontracted work must be initiated, coordinated and monitored by the Service Department</p>	<p><input type="checkbox"/> <i>Document or describe policy for initiating, coordinating and monitoring subcontracted work (may be integrated into service process map)</i></p>
<p>7.14 Dealership must ensure every boat brought in for service must be returned to the customer in as clean, if not cleaner, condition as when it was dropped off.</p>	<p><input type="checkbox"/> <i>Explain process to ensure every boat brought in for service must be returned to the customer in as clean, if not cleaner, condition as when it was dropped off.</i></p>

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8. PARTS REQUIREMENTS

Requirement	Required Documentation
8.1 Parts Process Map must include process activities, action steps and designated responsibilities; improvements are made as needed and maps are updated quarterly	<input type="checkbox"/> <i>Copy of Parts Process Map includes process activities, action steps, designated responsibilities; quarterly review date and process changes are noted or color coded and shared with employees</i>
8.2 Dealership must have a process to track inventory, inventory turns, lost sales and obsolescence	<input type="checkbox"/> <i>Explain process to track shelf and mobile inventory, inventory turns, lost sales and obsolescence</i>
8.3 Dealership must have a process in place for inventory control that includes parts used as well as order and return requirements	<input type="checkbox"/> <i>Explain process for inventory control.</i>
8.4 The Parts Department must be secure and only authorized personnel should be allowed to distribute parts with appropriate paperwork from technicians.	<input type="checkbox"/> <i>Provide pictures of secure Part Department and copy of paperwork used by technicians.</i>

9. CUSTOMER FOLLOW-UP REQUIREMENTS

Requirement	Required Documentation
9.1 Customer Follow-up map(s) must include process activities, actions steps and designated responsibilities; improvements are made as needed and maps are updated quarterly	<input type="checkbox"/> <i>Provide copy of customer follow-up map(s) with process activities, action steps, designated responsibilities, quarterly review dates and process changes are noted and shared with employees</i>
9.2 Contact 100% sales customers by phone within seven days of sale with request for feedback	<input type="checkbox"/> <i>Provide Sales follow-up call log within seven days of sales that includes customer name, sale date, call date, person calling, comments and indication if Customer Feedback Report (CFR) was generated</i>
9.3 Contact 100% of appointment service customers within 7 days of service with request for feedback	<input type="checkbox"/> <i>Provide Service follow-up response log with customer name, sale date, date response received, comments and indication if Customer Feedback Report (CFR) was generated (most recent month)</i>
9.4 Sales person(s) make "thank-you" for the business call within 24 hours (1 business day) of sale	<input type="checkbox"/> <i>Describe dealership 24 hour (1 business day) 'thank-you' for the business call process; include copy of call log</i>
9.5 The follow-up process must contain at least one open-ended satisfaction question	<input type="checkbox"/> <i>Copy of satisfaction question(s) used for both sales and service follow-up phone calls</i>
9.6 Track & Trend Sales & Service Customer feedback	<input type="checkbox"/> <i>Provide track and trend reports (Heat Sheet - one from Sales, one from Service)</i>
9.7 Customer Feedback Reports must be completed based on follow-up identified customer issues	<input type="checkbox"/> <i>Copy of one sales and one service Customer Feedback Report (heat sheet)</i>

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10. EMPLOYEE REQUIREMENTS

Requirement	Required Documentation
10.1 Must have job descriptions for each position, and all employees have received a copy	<input type="checkbox"/> Provide job description samples for Sales, Service and Parts (1 employee and 1 manager from each department)
10.2 Complete annual performance evaluations for all employees	<input type="checkbox"/> Provide example of annual employee performance evaluations (one employee and one manager from each department Sales, Service and Parts - may black out name if desired)
10.3 Dealership conducts an annual Employee Satisfaction Survey and shares results with employees	<input type="checkbox"/> Complete an Employee Satisfaction Survey <input type="checkbox"/> Dealership must conduct an employee meeting to share ESS survey results and actions taken
10.4 Dealership must have an employee handbook provided to all employees, which includes grooming and dress code, organization chart, discipline procedure, employee parking, smoking policy, company vehicle use, attendance policy and employee purchase plan	<input type="checkbox"/> Provide copy of dealership's Employee Handbook (must include dress code, organization chart, discipline procedure, employee parking, smoking policy, company vehicle use, attendance policy, employee purchase)

11. TRAINING REQUIREMENTS

Requirement	Required Documentation
11.1 Owners and managers will need to show they have completed at least 30 hours of training, including 10 hours of succession planning, 10 hours of sales and marketing training, and 10 hours of leadership and management training.	<input type="checkbox"/> Provide proof of 30 hours of training for each owner and manager
11.2 Dealership continually improves sales persons knowledge and skill for Brunswick brands as well as other brands sold in the dealership	<input type="checkbox"/> Document Brunswick brand product training conducted by manufacturer or dealership and product training on other brands sold in the dealership (could be listed on training history log/records)
11.3 Dealership provides and tracks job training for all employees (including new employees) and maintains annual training history for all employees	<input type="checkbox"/> Provide training history log for all employees <input type="checkbox"/> Describe how and when job training is provided to new employees
11.4 Technicians must be trained on all products serviced by the dealership, and the dealership must have at least one Factory Certified Mercury technician on staff and either a Certified Mercury Master technician, or have a technician that will be taking the Master exam in the next 12 months, on staff.	<input type="checkbox"/> Report of Service training on all Brunswick brands serviced;; document dealership has 1 Mercury Master Technician; or a technician that has sat for the test within the last 12 months or a provide plan for a technician to sit for Master exam in the next 12 months <input type="checkbox"/> Provide technician certification records; describe plan to ensure techs are certified on all products they service (shop competency)
11.5 Dealership must have a documented service technician apprenticeship program	<input type="checkbox"/> Provide documentation for technician apprenticeship program.
11.6 Dealership must have the appropriate personnel complete online Warranty Administrator training.	<input type="checkbox"/> Provide proof of completed Warranty Administrator Training.

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12. FACILITY REQUIREMENTS

Requirement	Required Documentation
<p>12.1 Overall appearance of facility must be clean and well maintained and safe including:</p> <p>12.1.1. Appropriate external permanent signage identifying the dealership and key boat brands</p> <p>12.1.2. Clearly marked boat and vehicle parking</p> <p>12.1.3. Boat accessories displayed properly in a clean, orderly, customer accessible fashion</p> <p>12.1.4. Customers have convenient and safe access to display boats</p> <p>12.1.5. Outdoor display areas are attractive, well organized and easily recognizable and landscaping is well maintained</p> <p>12.1.6. Customer accessible areas are clean, well maintained, organized and uncluttered</p>	<p><input type="checkbox"/> Photograph(s) of dealership signage and key boat brands</p> <p><input type="checkbox"/> Photograph(s) of clearly marked boat and vehicle parking and secure area for boats awaiting service</p> <p><input type="checkbox"/> Photograph(s) of accessories display area</p> <p><input type="checkbox"/> Photograph(s) of display boats with safe customer access (steps etc.)</p> <p><input type="checkbox"/> Photograph(s) of outdoors display area</p> <p><input type="checkbox"/> Photograph(s) of service write-up, customer lounge, cashier area and service bays if visible to customers</p>
<p>12.2 Have a phone answering and walk-in customer process for all departments, which should be updated regularly. This process should include a prompt greeting as well as an upfront zero-out option for a live person if you use an answering system. On-hold messaging, monitoring and effective department transfers to an available employee should also be reviewed regularly.</p>	<p><input type="checkbox"/> Provide examples of your phone answering and walk-in customer process</p>
<p>12.3 Facility Check sheets must be completed quarterly (with at least one completed annually by a customer)</p>	<p><input type="checkbox"/> Copies of Facility Check sheets (last two quarters; one completed by a customer)</p>

13. CONTINUOUS IMPROVEMENT

Requirement	Required Documentation
<p>13.1 Dealership must have a continuous improvement person or team that meet with department managers quarterly to review customer feedback and employee input to determine improvements to be made and recommend them to the team and are responsible for making and necessary changes to process maps and communicating these changes</p>	<p><input type="checkbox"/> Provide samples of two Process Improvement Reports completed and actions taken in the last year because of identified issues</p> <p><input type="checkbox"/> Explain your management review process and how employees are notified of process changes</p>
<p>13.2 Dealership must complete Process Improvement Reports for Sales, Service, Parts and Follow-up processes and make improvements based on any customer-identified issue</p>	<p><input type="checkbox"/> Provide samples of Process Improvement Reports for Sales, Service, Parts and Follow-up processes</p>
<p>13.3 Dealership must complete Facility Process Improvement Worksheets based on issues identified by the Facility Check Sheets</p>	<p><input type="checkbox"/> Provide samples of Facility Process Improvement Worksheets</p>
<p>13.4 Dealership must conduct Quarterly Management Reviews</p>	<p><input type="checkbox"/> Provide copies of completed Quarterly Management Reviews (last two quarters)</p>