



29 TIPS TO SELL AND SERVICE BOATS SAFELY



Marine businesses throughout North America are working to adjust their operations to care for their team, and for current and prospective customers during the COVID-19 Pandemic.

The World Health Organization (WHO), the U.S. Center for Disease Control (CDC), and the Canadian Government have led the way for us all, using their expertise and authority to provide guidance for businesses and consumers. We've provided links to their guidance at the bottom of this document.

In addition, many states, provinces and even counties have issued their own regulations and guidelines to help keep the public and the businesses who serve their communities safe.

As you follow the regulations and guidelines that specifically apply to you, your team and your community, below are some ideas and best practices collected by the Marine Retailers Association of the Americas you might consider to help you safely adapt to the COVID-19 Pandemic.

Boat & Engine Service

Physical contact between customers and your staff must be eliminated to reduce the risk to spread the virus.

Here are a few ways you can do that:

1. Service writers can communicate with customers via email, text, chat or video chat.
2. Technicians can work solo on a unit without the customer or others nearby.
3. If a technician needs physical help completing a task, other dealership team members can wear disposable gloves and n95 face masks to protect both employees.
4. All units being dropped off by a customer can and should be cleaned and disinfected by the technician before they begin work.
5. All units being prepared for a customer should be cleaned and disinfected by the technician before the boat is made available for pick-up.
6. Only one customer should be allowed to drop off or pick up a boat at any given time and place.

Appointment Setting

1. Direct customers to use the Appointment Request forms hosted on your website, if available. This will help with capturing the customer data and boat information, and give your team a start on understanding the needed service.
2. Make sure a phone number is required so you can move the conversation to the phone for clarity on the needed service and follow-up. The initial phone conversation will need to go deeper than normal to get as much understanding as possible for the needed service.
3. For those who can't or who would rather not use the online Appointment Request, use the phone to schedule the appointment and gain clarity of the service needed

Walk-Ins

1. Greet customers with signage at the service entrance that directs them to call or go to your website to schedule an appointment.

Repair Orders (RO)

1. Prepare Repair Orders in advance with information provided from the Appointment Process and pull needed





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parts for the technicians using gloves, if available, to reduce the need to disinfect before installation.

Drop-off or Pick-Ups

Whether your staff is picking up a customer's boat at their house or the customer is dropping off a boat at your dealership, this process should be designed to be completed safely by as few people as possible (ideally, by one person who does not require assistance) — not the normal experience that you are used to providing for your customers. Equip your vehicles and forklifts with sanitizer and disposable gloves.

1. Drop-Offs: Clear an area that makes it easy for a customer to drop off a boat via trailer, limiting the need for backing up and assistance as much as possible. Supply signage that explains the reason to keep your staff at a distance, where to drop-off the boat and what to do with keys. Do what's needed to ensure the security of the boat and gear after drop-off.

2. Pick-Ups: Direct customers to leave the boat in a place your driver can access the boat without assistance and to provide information on where they can find the keys ahead of time. Let them know prior to arrival that they will need to stay at a distance, no closer than directing the driver toward the trailer tongue. Note: Do not attempt any task that could injure yourself, others or damage the boat. Always have disposable gloves and a mask on hand if close assistance is needed.

Check-In

This again needs to be done without personal contact or assistance from the customer. Proceed with your standard process that might include:

1. Visually confirm requested service
2. Condition or damage - Note and photograph
3. Complete Safety Checklist
4. Complete Repair Order with customer via phone to include:
 - › Best contact method: Text, Email or Phone
 - › Other needed service or repairs noted

- › Promised ready date
- › Payment method and pre-approval
- › Gain authorization as required via phone, email or text
- › Note: don't omit complete Check-In process for boats in storage

If you need to speak to the customer, do it from a safe distance of at least 6 feet. If weather permits, holding these conversations outside by meeting the customer near their vehicle.

Start the Job

1. Technicians are in their comfort zone working solo, so this directive will be welcomed by the techs!
2. In addition, the secure Parts Department will keep the technicians at a distance from the Parts staff. If you're already doing this, continue to keep your staff at a distance and the parts secured! If this hasn't been your policy, now is the time to start.
3. Techs should use their own bins or carts to move parts to tools to and from the boat.

Updating Customers and Securing Authorization

1. Use the customer's preferred method of contact to keep the customers updated on their boat's status and ready time.
2. Use FaceTime or other forms of video chat to show customers the needed repair or service, and gain authorization via text, email, DocuSign or phone.
3. Consider a service like Kenect or CoVideo to personalize your communications.





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Complete the Job

1. Complete the authorized work, the RO, warranty claims and associated paperwork using digital communications if at all possible.

Schedule Pick-Up or Delivery

1. Use the preferred method of contact to schedule a safe pick-up or delivery.

2. If you haven't already communicated how you will ensure the pick-up or delivery is conducted with the safety of the customer and your employees in mind, this is the time to do so.

Courtesy Clean

1. Cleaning and disinfecting each boat after service, if not already a dealership policy, may provide additional reassurance to current and prospective service customers.

2. Reinstall canvas and manage drain plugs as required.

Pickup or Delivery

1. Execute the same protective and distance procedures used when you acquired the boat from the customers, as detailed above under Drop-Off and Pick-Up.

While the tips throughout were assembled for you with the safety of your team and your customers in mind, the leading authorities on safe practices during the COVID-19 Pandemic are the following organizations, as well as the guidance and regulations provided by your other local, state, provincial and federal bodies. You'll find links to more resources below.

Learn more here:

[World Health Organization \(WHO\)](#)

[U.S. Center for Disease Control \(CDC\)](#)

[Canadian Government](#)

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