



ANCHORING

THE 9 LEADERSHIP DISCIPLINES THAT REDEFINE DEALERSHIP SUCCESS



GET THE BOOK

COMPANION RESOURCE · DISCIPLINE: RUN ON DATA, NOT JUST INSTINCT

The CRM Data Discipline

The goal of CRM is not just tracking information — **the goal is to help you and your team remember.** That only happens by capturing the right insights at the right time, which gives your team the ability to personalize follow-up, build trust, and strengthen loyalty at every stage of the customer journey. These are the high-impact details that help you sell smarter and serve better.

CORE CUSTOMER DETAILS *Complete on every customer record. No exceptions.*

FIELD	WHY IT MATTERS
Full Name	Accurate records = better personalization and reporting.
Preferred Contact Method (Text, Email, Call)	Respecting communication style builds trust.
Phone Number & Email	Basic, but must be accurate. No typos, no placeholders.
Mailing Address (with ZIP code)	Useful for follow-up mailings, geo-segmentation, and service targeting.
Lead Source	Helps identify which marketing channels are working.

BOAT & BUYING INTENT DETAILS *These reveal what the customer wants and how soon they might be ready.*

FIELD	WHY IT MATTERS
Boat Type Interest (Pontoon, Bowrider, Center Console, etc.)	Enables smart product recommendations.
Brand & Model Interest	Helps automate tailored follow-up and promotions.
Purchase Timeline	Guides lead nurturing cadence (hot, warm, long-term).
Financing Preference	Sales can prep accordingly.
Used vs. New Preference	Impacts inventory suggestions and messaging tone.
Trade-In Interest	Flags opportunities and valuation needs.

CUSTOMER PROFILE INSIGHTS *These help your team personalize with purpose and build lasting relationships.*

FIELD	WHY IT MATTERS
Boating Lifestyle Intent (Family fun, Fishing, Entertaining, Prestige, Watersports)	Enables emotional connection and tailored messaging.
Waterway Location (Where they plan to use the boat)	Allows for geographic relevance and seasonal strategy.
Ownership History (First-time vs. experienced boater)	Adjusts language, onboarding support, and education.
Family or Household Details (Kids? Pets? Multi-generational?)	Helps tailor demo experiences and post-sale care.
Occupation or Background Info	Builds rapport and adds sales context.

POST-SALE & RELATIONSHIP TRACKING *Capture these fields to support retention, referrals, and post-sale loyalty.*

FIELD	WHY IT MATTERS
Delivery Date	Powers anniversary messages, service reminders, and check-ins.
Service History Notes	Informs future care and flags satisfaction risks.
Event Attendance	Helps build community and invite to future experiences.
Referral Source	Allows recognition and encourages more referrals.
Customer Satisfaction Feedback	Drives follow-up coaching and service recovery.

PRO TIPS FOR CRM DATA DISCIPLINE

- **Don't overwhelm your team.** Focus on the top 10–15 fields and build from there.
- **Use dropdowns wherever possible.** Avoid messy free text and inconsistent inputs.
- **Audit regularly.** Spot-check profiles monthly to maintain integrity and coach habits.
- **Make key fields required.** If it's critical, bake it into the process.
- **Coach with examples.** Show how details lead to better follow-up and stronger closes.