

PLAYBOOK

Boat Dealers

Handshake Outreach email sequence, adapted.

Four messages, one sequence. Mail-merge ready.

ADAPTATION 4

Category notes

Industry research from Discover Boating / NMMA found that two-thirds of first-time boat buyers won't give out personal information until the point of purchase — making this category uniquely well-suited to identity-resolution outreach. The same study found that 64% of lapsed shoppers said they weren't confident they knew enough about boats to buy one, 42% were deterred by hidden costs, and 66% reported a poor dealer experience as the reason they walked away. Most first-time buyers don't have anyone in their life they trust to give boat advice.

The unspoken fears: “I'll get nickel-and-dimed by costs I didn't see coming” and “I don't know enough to ask the right questions, and the dealer will use that.” Insider terms: marine survey, sea trial, slip vs. dry storage, HIN (Hull Identification Number), boat show pricing, freight & prep, winterization, blocking, on-water trial. Lean into education — in this category, an actual expert who teaches comes across as rare and trustworthy.

MESSAGE 1 OF 4 / SEND WITHIN 4-24 HOURS

Message 1: The Honest Hello

Acknowledge the cold contact. Promise no follow-up barrage. Name the hidden costs.

Subject: A note from [First Name] at [Dealership] – no follow-up calls, just one note

Hi –

You stopped by [Dealership]'s site recently. Most people researching a boat don't fill out a form on the first visit, or the second, or honestly the tenth, and that's fine – the buying process is supposed to take its time. I'm not going to chase you with calls.

I'm [Name], [role] at [Dealership]. One short note, one useful thing.

If you're early in the process and not sure how much you don't know yet, here's the most useful thing I can tell you: the price on the sticker is the smallest part of the cost of owning a boat. The first-year ownership cost – slip or storage, insurance, registration, winterization, fuel, basic maintenance – typically runs 10-20% of the boat's purchase price. On a \$50,000 pontoon that's \$5,000-\$10,000 a year before you've replaced a single part. Most first-time buyers don't get told this until they're already at the F&I desk.

I'll send two or three more short notes over the next couple of weeks – things like how to read a sea trial, what a marine survey actually does, and how dealer freight & prep fees vary. No sales pitches. Easy unsubscribe.

– [Name]

[Direct line, reply-to]

MESSAGE 2 OF 4 / SEND 3-4 DAYS LATER

Message 2: The Inside Knowledge

The costly signal: teach them what to inspect — with you or any dealer.

Subject: The one thing every first-time boat buyer should do before signing

[Name],

Following up. If you're shopping for a boat, the most expensive mistake first-time buyers make is skipping the marine survey — either because the dealer says “we already inspected it” or because they don't want to spend \$400–\$1,500 on top of the purchase.

Here's the part I'd tell my own family: a dealer pre-sale check and an independent marine survey are different things. A dealer check is fast, focused on getting the boat ready for handoff, and performed by someone whose paycheck depends on the sale closing. An independent survey — ideally by a SAMS or NAMS certified surveyor — takes most of a day, runs every system under load, and produces a written report you can use to negotiate or walk away. On used boats it routinely catches things like soft transoms, water-intruded stringers, and gelcoat blisters that aren't visible from the dock. On new boats it catches the small but annoying things that turn into warranty fights later.

Two practical points: (1) write “subject to satisfactory marine survey and sea trial” into your purchase agreement before you put down a deposit. Reputable dealers will agree to this. The ones who push back are telling you something. (2) Always sea-trial the actual boat you're buying, not a similar one off the lot. Different motors and rigging behave differently in the water. A 30-minute trial in real conditions is worth more than any spec sheet.

If you want a deeper read, [Dealership]'s first-year ownership cost calculator and pre-purchase checklist are at [link]. No form.

— [Name]

MESSAGE 3 OF 4 / SEND 5-7 DAYS LATER

Message 3: The Story

One real customer with a friction moment. The realistic boat-life math.

Subject: The customer who almost bought the wrong boat (twice)

[Name],

Wanted to share a story.

A couple I'll call Tom and Janet came to us a couple of summers ago looking at a 24-foot cabin cruiser. Their dream was weekend trips on [local body of water], maybe staying overnight occasionally. Tom had been looking for nine months. He'd visited four dealers, two boat shows, and was ready to write a check.

We almost sold him the cruiser. Then I asked a question I always ask first-timers: walk me through what an actual day on the boat looks like. He described it. The boat they were about to buy was wrong.

Here's what came out of the conversation. They had a 20-minute drive to the marina. They didn't have a slip yet, and the marinas they liked had two-year waitlists. They were planning to trailer at first – but their SUV's tow rating couldn't handle a 24-footer with a full fuel tank and gear. Once we walked through the actual logistics, the cruiser would have lived in dry storage forty minutes away, taking three hours to launch every time they wanted to use it. That's not a weekend boat. That's a project.

We sold them a 21-foot dual console instead, \$18,000 less, that they could trailer behind their SUV and launch in 25 minutes. Two summers in, they've used it 60+ times. Tom told me last fall that the cruiser would have killed boating for them inside a year.

I'm sharing this because the size of the boat matters less than the friction between you and using it. The right boat is the one you'll actually take out. The wrong boat is the one that sits, no matter how nice it is.

If you want to talk through what an actual day on the water looks like for you – including the boring logistics that decide whether you'll use the boat – reply to this email or call [number]. No sales pitch. One more note and then I'll leave you alone.

– [Name]

MESSAGE 4 OF 4 / SEND 5-7 DAYS LATER

Message 4: The Clean Close

Three options. The exit is graceful. The questions are theirs to use — with anyone.

Subject: Last note from me

[Name],

Last email unless you want to stay in touch. Three options:

If you want to come look at boats: Reply or call [number] and ask for [Name]. Weekday mornings are quiet — you'll have the dock to yourself and there's time for a real walk-around. We can do a sea trial on any in-stock boat with 24 hours' notice during the season.

If you want to keep researching: [Dealership] sends one short note a month — new and used inventory worth a look, end-of-season pricing patterns, and one piece of education per email. No daily blasts. [link] to subscribe.

If we're not the right dealer for you: Whoever you end up buying from, four questions will protect you: (1) can I get an independent marine survey before closing? (2) what's the freight & prep fee, and is it negotiable? (3) what does the dealer's service department actually look like — how many techs, what's the wait time for warranty work in season? (4) will the dealer take the boat back on a trial basis if I'm not happy after the first month? The answers separate dealers who care about your second boat from dealers who only care about the first.

Either way, hope you find the right boat.

— [Name]

How to ship this

- **Replace the brackets.** [Dealership], [Name], [role], [number], [link], [boat category] — every placeholder filled, nothing left in template form.
- **Pick a real salesperson or sales manager as the sender.** Not a generic intake. Use their direct line and reply-to that reaches the actual person.
- **Render the body as plain text.** HTML email part, slightly large font (~16-17px), warmer-than-white background. Looks typed. Reads typed. People scan plain text differently.
- **Mind the cadence.** Message 1 within 4-24 hours. Message 2 at day 3-4. Message 3 at day 8-11. Message 4 at day 13-18. Then stop.
- **Honor the promise.** If you said “last email,” it's the last email. Reactance kills the relationship faster than silence.