



# ONEWATER CONNECT

November 12, 2024

## CREATING THE BEST OUTCOME WITH FOLLOW-UP



Rewatch Andy's message, "Creating the Best Outcome With Follow-Up", from last Friday by clicking [here](#).

You can always rewatch Andy's messages by visiting the [OneWater Training Portal](#).

[VIEW RECORDING](#)

*\*Please log in to the training portal and then access the link above.*

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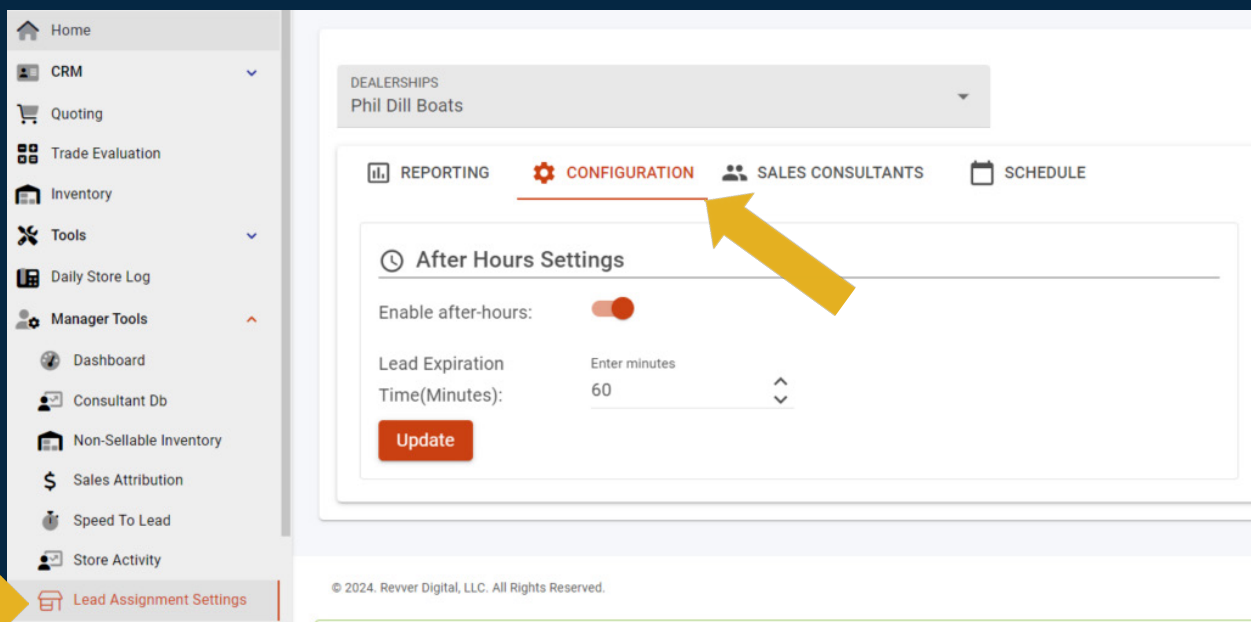
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## PRO REVVVER

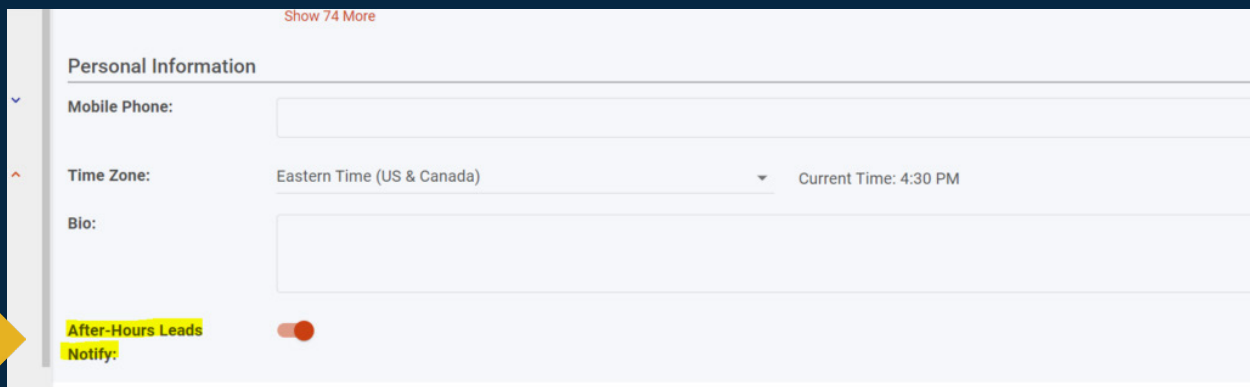
### AUTOMATIC LEAD ASSIGNMENT TOOL

The ProRevver team has released the automatic lead assignment tool, which allows managers to auto-assign leads after hours. The tool can also be used to create all-day round robin lead assignments.

To get to the Lead Assignment Tool, managers should navigate to **Manager Tools** > **Lead Assignment Settings** > **Configuration**. This is your Settings page to enable the feature and set your lead time limit expiration.



In order to show up in the automatic lead assignment tool, a sales consultant must "opt in" under his or her **User Profile** (found in top right). This is optional.



# HIGHLIGHTS

## AUTOMATIC LEAD ASSIGNMENT TOOL

To set the after-hours schedule or a round-robin event when you would like to auto-assign leads, go to **Schedule > New Event or New Recurring Event**.

The screenshot displays the 'SCHEDULE' tab in a software interface. At the top, there is a dropdown menu for 'DEALERSHIPS' with 'Phil Dill Boats' selected. Below this are navigation tabs: 'REPORTING', 'CONFIGURATION', 'SALES CONSULTANTS', and 'SCHEDULE'. A red bar at the top of the calendar area shows the time '03:21:15 PM'. The calendar view is set for 'November 10 - 16, 2024' and shows a grid with columns for 'Sun 10', 'Mon 11', and 'Tue 12'. The time slots are '9:00 AM', '10:00 AM', and '11:00 AM'. A yellow arrow points to the '+ New Event' button. Another yellow arrow points to the 'New Event' modal form, which is open and shows the following details:

- Title: Round-robin Lead Assignment Hours
- Location: Phil Dill Boats
- Start: 11/11/2024
- End: 12/31/2024
- All day
- Repeat: Daily
- Repeat every: 1 Day(s)
- End: Never
- Event Type: Round-robin Lead Assignment
- Description: (empty field)

At the bottom of the modal, there are 'SAVE' and 'CANCEL' buttons.

Managers will be able to see actions taken on each lead and the movement that occurred on the assignments from the reporting tab.

**For more information on the automatic lead assignment tool, view the trainings below:**

**TRAINING FOR MANAGERS**

**TRAINING FOR SALES  
CONSULTANTS**

# HIGHLIGHTS

## LEGENDARY MARINE GOLF TOURNAMENT SPONSORSHIP

The Legendary Marine Orange Beach team recently sponsored and played in a golf tournament to support the Wounded Warriors Foundation for Veterans Day.



Submitted by Lindsey Feely

## PHIL DILL BOATS EMPLOYEE OF THE MONTH

Congratulations to Jarius Schulte on being selected as Phil Dill Boats's Employee of the Month.

Jarius has been a technician since 2021. He goes above and beyond to help teach and guide others in the service center.



Submitted by Nathan Nichols

## REVIEWS AND UPCOMING EVENTS

### ★ ★ ★ ★ ★ 5-STAR REVIEWS

#### *Rambo Marine*

Worked with Lex, and received great and efficient service. He was quick to return calls, answer questions, and provide photos/videos making the experience thorough and comfortable. Also, going above and beyond winterizing and storing the boat until I'm able to pick up in the spring.

-David Buescher

### ★ ★ ★ ★ ★ 5-STAR REVIEWS

#### *Marina Mike's*

I wasn't sure how to begin this review, but I'll keep it brief. I purchased my 2024 Bennington Tritoon from this location, and while there were a few issues at the time of delivery, the experience quickly turned around. I reached out to Bob Gonzalez, the Service Manager, explained the problems, and brought my boat in for service. To my surprise, they resolved everything in just one day! I'm extremely pleased with both the results and the excellent customer service Bob provided.

Nelson Valdes

## UPCOMING EVENTS



Fort Myers  
Boat Show



Bosun's Marine  
Open House  
Christmas Party