

Taking the Leap HOW CRM IMPROVES CUSTOMER EXPERIENCE IN MARINAS

Tone Britovsek, Marina Master – President & Owner
Vesna Pavlovic, Marina Master – CEO

the
docks
expo



AGENDA

- CRM understanding in marina
- CRM added value for marina
- CRM best practices experience
 - CRM case studies
 - CRM, what's ahead
 - Discussion

CRM UNDERSTANDING IN MARINA



CRM UNDERSTANDING IN MARINA

CRM empowers marina to put the **customer** at the **heart of their business**, which is the fastest way to increase their sales and profit.

“

CUSTOMER SERVICE SHOULD
NOT BE A DEPARTMENT, IT
SHOULD BE THE ENTIRE
COMPANY

TONY HSIEH, CEO OF ZAPPOS

CRM UNDERSTANDING IN MARINA

CRM helps to improve customer experience.

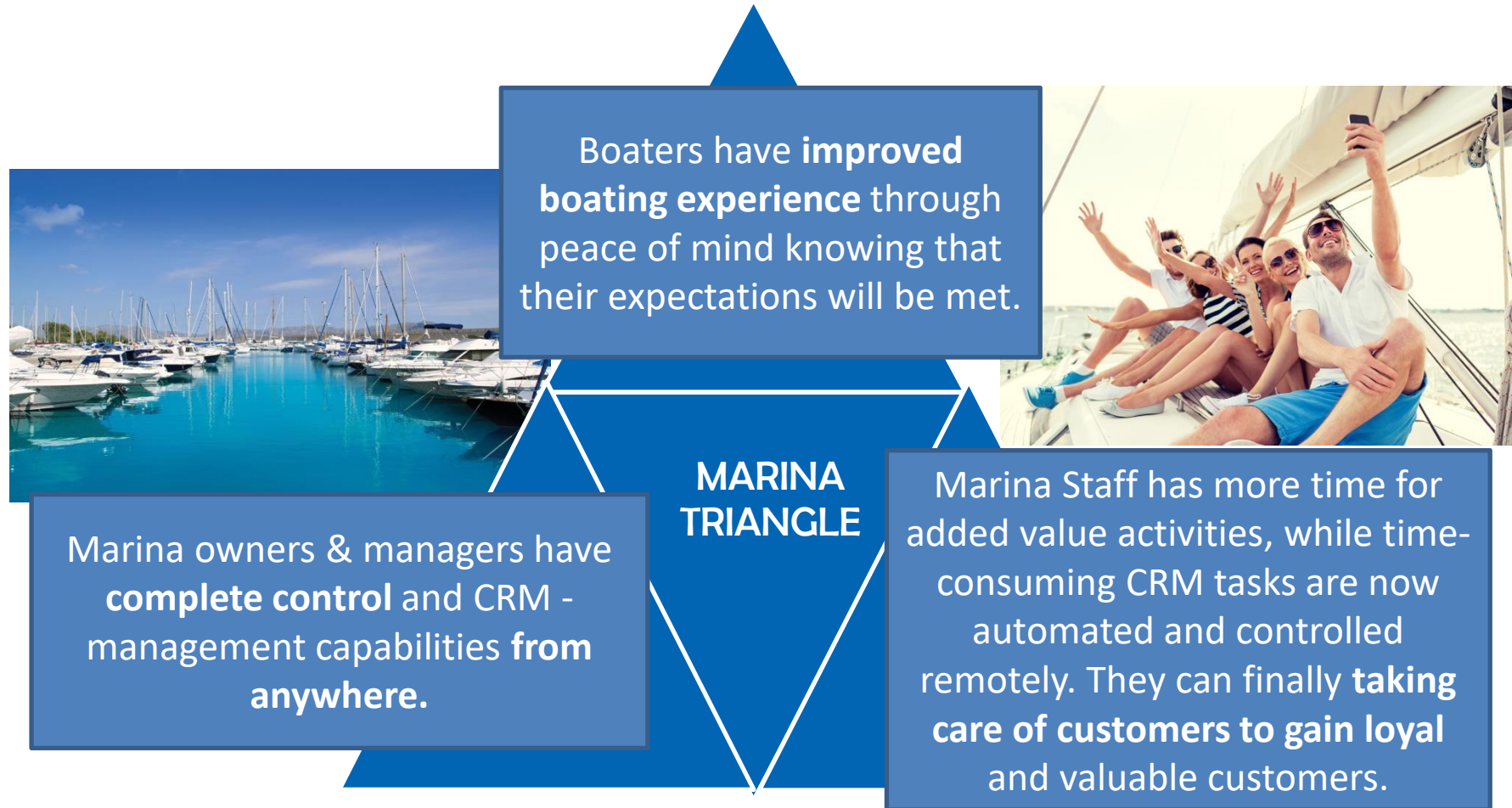


80% of CEO's believe they deliver superior customer experience. Only 8% of their customers agree. What would *your* customers think?

CRM DESIGNED FOR MARINA SPECIFICS



CRM DESIGNED FOR MARINAS ADDED VALUE

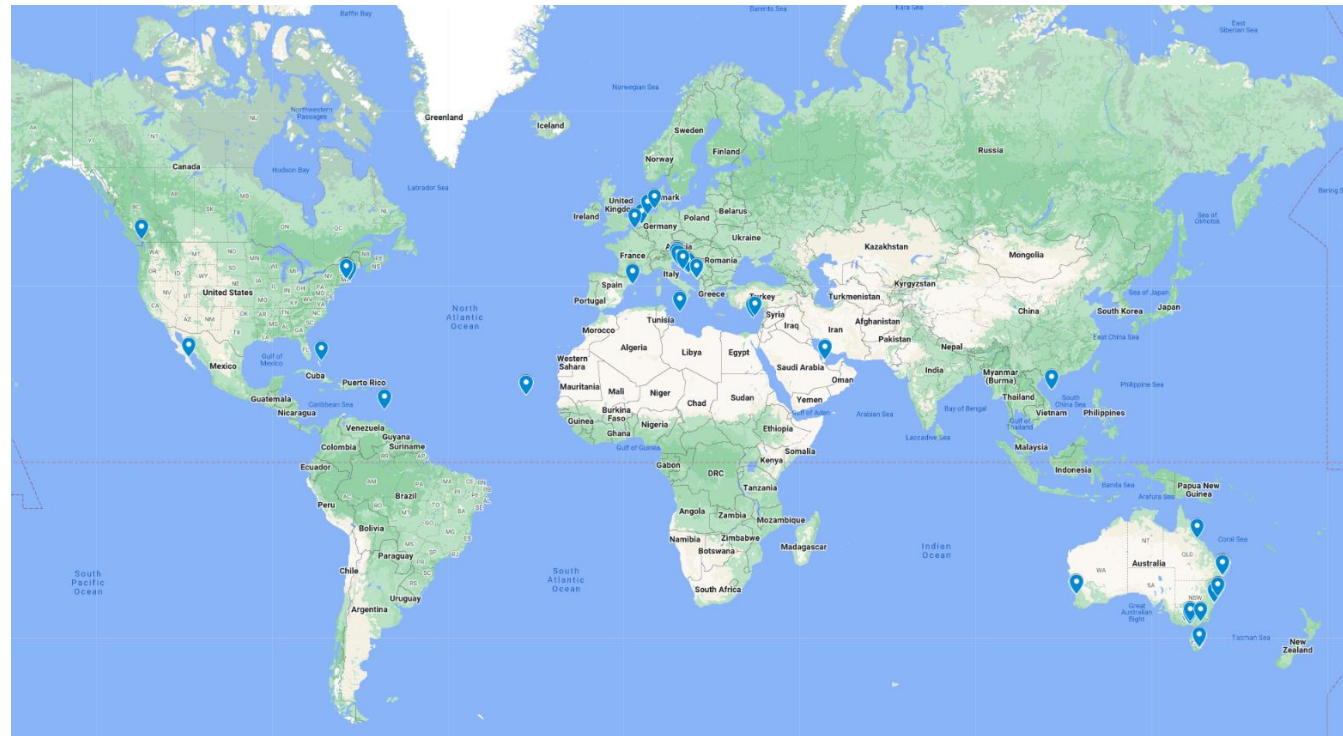


CRM DESIGNED FOR MARINA'S ADDED VALUE



CRM BEST PRACTICES EXPERIENCE

No two marinas in the world work the same way, but learning from best practices can bring benefits to each one.



CRM BEST PRACTICES EXPERIENCE

Enquires and converting leads into customers

Book a berth



BOOK A BERTH

Short Term Booking

Heading away for a few days or weeks?
Book a short term berth with us!



ENQUIRE NOW

Annual Berthing Enquiry

Please contact us on 1800 DALBORA (32 52 672)
for annual berthing enquiries.

ENQUIRY FROM
WEBSITE

Contact Us

Please complete our enquiry form and we will contact you within one business day to help with your request.

I want to enquire about:

- ☐ Berthing
- ☐ Boat Sales
- ☐ Boatyard
- ☐ Hospitality & Dining
- ☐ Other

First Name*

Contact number*

Location

Nelson Bay, NSW

Arrival Date

Message

Surname*

Email Address*

Length of stay

Length Overall

Sign up to the d'Albora newsletter*

Yes - I'd like to hear about news and special offers

Send

Marina staff is notified about new enquiry and can respond immediately

<input type="checkbox"/> Loyalty	Surname	Given name	Title
	<input type="text" value="Snow"/>	<input type="text" value="Jon"/>	<input type="text" value="Cap."/>
Membership	Address	State	
	<input type="text" value="1 PIER 8"/>	<input type="text"/>	
MARIN	Postal code	City	Country
<input type="checkbox"/> Herrin	<input type="text" value="02129"/>	<input type="text" value="Charlestown"/>	<input type="text" value="USA"/>
<input type="checkbox"/> HOTEL	Card ID	Currency	Membership number
<input type="checkbox"/> Locati	<input type="text"/>	<input type="text" value="USA DOLAR"/>	<input type="text"/>
<input type="checkbox"/> Locati	Contacts	Cards	Accesses
<input type="checkbox"/> Locati	<input type="text"/>	<input type="text"/>	<input type="text"/>
Communication / Business			
Email		Type	
<input type="text" value="office@charlestownmamarina.com"/>		<input type="text" value="3-LEAD"/>	

CRM BEST PRACTICES EXPERIENCE

Automatic emails

At arrival...

Subject **Welcome to Limassol marina**

Dear mrs Vesna,

Welcome to Limassol Marina, we hope that you enjoy your stay with us.

We would like to thank you for choosing to use our services and facilities and remind you that our team are at your disposal to assist you with anything that you

Please find key contact details below and you may find out more by visiting our website at www.limassolmarina.com

Marina Reception: +357 25 020020
Marina Operations Duty Phone: +357 95 115268
Marina Security Duty Phone: +357 95

Marine Police:113

Emergency Services:112

Please don't hesitate to call Marina Reception for further information.

Kind regards

Marian staff

T: +357 25 020 020 F: +357 25 022 699 E: [berths@limassol](mailto:berths@limassolmarina.com)

[Website](#) [Facebook](#) [Instagram](#) [Twitter](#) [Youtube](#)



After departure...

To vesna.pavlovic@irm.si

Subject **Farewell from Limassol Marina**

Dear mrs Vesna,

Thank you for choosing Limassol Marina, we hope that you enjoyed your stay with us and we look forward to welcoming you back to our waters again soon!

Your feedback is very valuable to us as we strive to improve the experience of our customers and continue to develop our facilities and services. We would therefore appreciate your feedback via the following link.

We thank you in advance for your assistance!

Kind regards,

Marina staff

T: +357 25 020 020 F: +357 25 022 699 E: berths@limassolmarina.com

[Website](#) [Facebook](#) [Instagram](#) [Twitter](#) [Youtube](#)



CRM BEST PRACTICES EXPERIENCE

Customer data is a king

Location 09 - Vesna Test

Owner Tools Services Finance CRM

Customer

Surname

Test

Given name

Vesna

Title

Mrs.

Address

Pine tree st.14

State

NSW

Postal code

2000

City

Sydney

Country

AUSTRALIA

Card ID

048868fad35b81

Currency

USA DOLAR

Membership number

S-245550

Contacts

David

Cards

Security Deposit, Key D

Accesses

Full Access, Group A, M

Communication / Business

Email

vesna.pavlovic@marina-master.com

Type

5-CLIENT

GSM

+38631203501

Telephone

79280333

Secondary phone

Registration number

VAT Number

Taxpayer

No

Bank account

Contract - 31/08/23

Number

7/19

Area

SEA

Berth

B/13

Date from

01/09/2021

Date to

31/08/2022

Other

Sublease

Owner occupied

Private rental

Image

Signature

Notes

Vesna Test

Basic

Personal

Communication

Business

Correspondence address

Internet settings

Other

Enquiry

Mailing

Sales phase

5-Won

Sell phase status

Hot

Arrival date

01/03/2017

Length of stay

Departure date

Preferred side

Boat length

Boat berthed at

Boat location

Location 09

Boat name

Lily

Initial contact

01/08/2018

Last contact

13/09/2021

Next follow up

Conversion date

Referral

Referral from a person

Referral person

John White

Manager

CHRIS

Show activities

Enquiring about

☒ Apartment

☒ Berth

☐ Camp site

☐ Car park

☐ Dry storage

☐ Mooring

☐ Sailing school

Enquiry term

☒ Permanent

☐ Special event

☐ Temporary

Work orders

OPEN

Services

OPEN SERVICES

Deposits

0.00

Attachments

EL - Electricity C/12 (500.00), WT - Water C/7 (0.02)

Image

Signature

Notes

12/07/21 04:15 INFO

Call ms. Vesna on Monday..

03/03/21 07:13 INFO

Vesna asked for better price

21/02/21 12:49 INFO

Enquiry about summer rental

23/09/19 12:07 DEMO

Enquiry about 3-days berth in October



23/09/19 09:18 DEMO

CRM BEST PRACTICES EXPERIENCE

High level of services

Berth Type	Utility locked	Name	Spouse	m ft	Boat details	Comment	Mobile	Home	Newspaper	Coffee
B20	14.0	Name 24794 Last name 2479	Name 24804 Last name 24804	10 34	Gemini (Catamaran 16800)	Test	015199121	015199121		
B21	12.0	VACANT								
B22	14.0	Name 23959 Last name 2395		13 42	Lagoon (Catamaran 16087)	Test	015199121	015199121		
B23	12.0	Name 24194 Last name 2419	Name 24199 Last name 24199	14 46	Catamaran (Catamaran 16291)	Test	015199121	015199121		
B24	14.0	Name 23959 Last name 2395		13 42	Lagoon (Catamaran 16087)	Test	015199121	015199121		
B25	12.0	Name 4585 Last name 4585	Name 4586 Last name 4586	22 72	Custom (Motor Boat 3641)	Test	015199121	015199121	Telegraph	Hot Chocolate 2 Sugar Cap 2 Sugar
B26	14.0	Name 4585 Last name 4585	Name 4586 Last name 4586	22 72	Custom (Motor Boat 3641)	Test	015199121	015199121	Telegraph	Hot Chocolate 2 Sugar Cap 2 Sugar
C1	12.0	Name 23849 Last name 2384		14 45	Yacht (Sailing Boat 15998)	Test	015199121	015199121		
C2	17.5	VACANT								
C3	12.0	Name 497 Last name 497		11 36	Caribbean (Motor Boat 507)	Test	015199121	015199121	SMH	Cap
C4	17.5	Name 5117 Last name 5117	Name 5118 Last name 5118	15 50	Riviera		015199121	015199121		

Main menu
Menus

	Given name	Price	Quantity	Comment
<input type="checkbox"/>	5kg Bag of Ice	5.00		
<input checked="" type="checkbox"/>	 Cheese and Fruit Platter for 1 Assorted cheeses and seasonal fruit	13.00	1	
<input type="checkbox"/>	Cheese and Fruit Platter for 5 Cheese and Fruit platter including a range of cheeses, biscuits, seasonal fruits and nuts for 5 people	50.00		
<input checked="" type="checkbox"/>	 Cold Seafood Platter Marinated Seafood, Candy lime oysters, natural oysters, smoked salmon and greek salad	25.00	1	
<input type="checkbox"/>	Dips and Bread 2 dips with pitta bread.	5.00		
<input type="checkbox"/>	Mixed Sandwiches for 5 people	30.00		

Alarm

Created
17/11/2022

Message
Food and - Cheese (TEST)

Comment

Assistance - Edit

Date *
17/11/2022 4:29 PM

Type *

Comment
- Cold Seafood Platter (1)
- Cheese and Fruit Platter for 1 (1)

+ Add service
Upload/show files

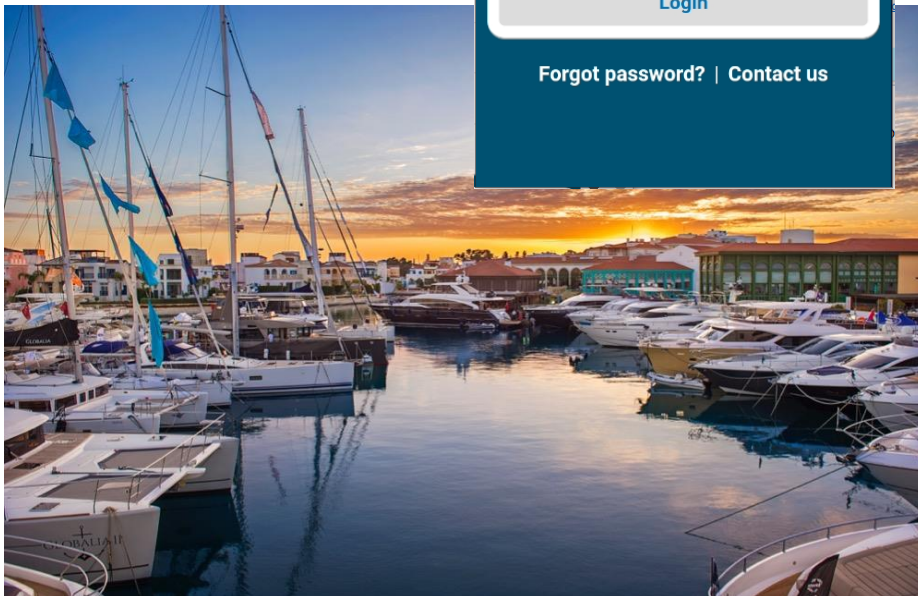
Cancel Confirm

Cancel Show details Show vessel/owner information Confirm



CRM BEST PRACTICES EXPERIENCE

Use of app for interactions of customer with marina



myMarina

Login

Limassol Marina
living on the sea

Username

Password

Remember me ☐

Login

Forgot password? | Contact us

myMarina

Main menu

Limassol Marina
living on the sea

Welcome, Tone Britovsek

Balance

Meter status

- Show notifications (274)
- Submit a Crew List
- Marina map
- Show my boats
- Show my data
- Approved contractor directory

myMarina

Main menu

Contact us

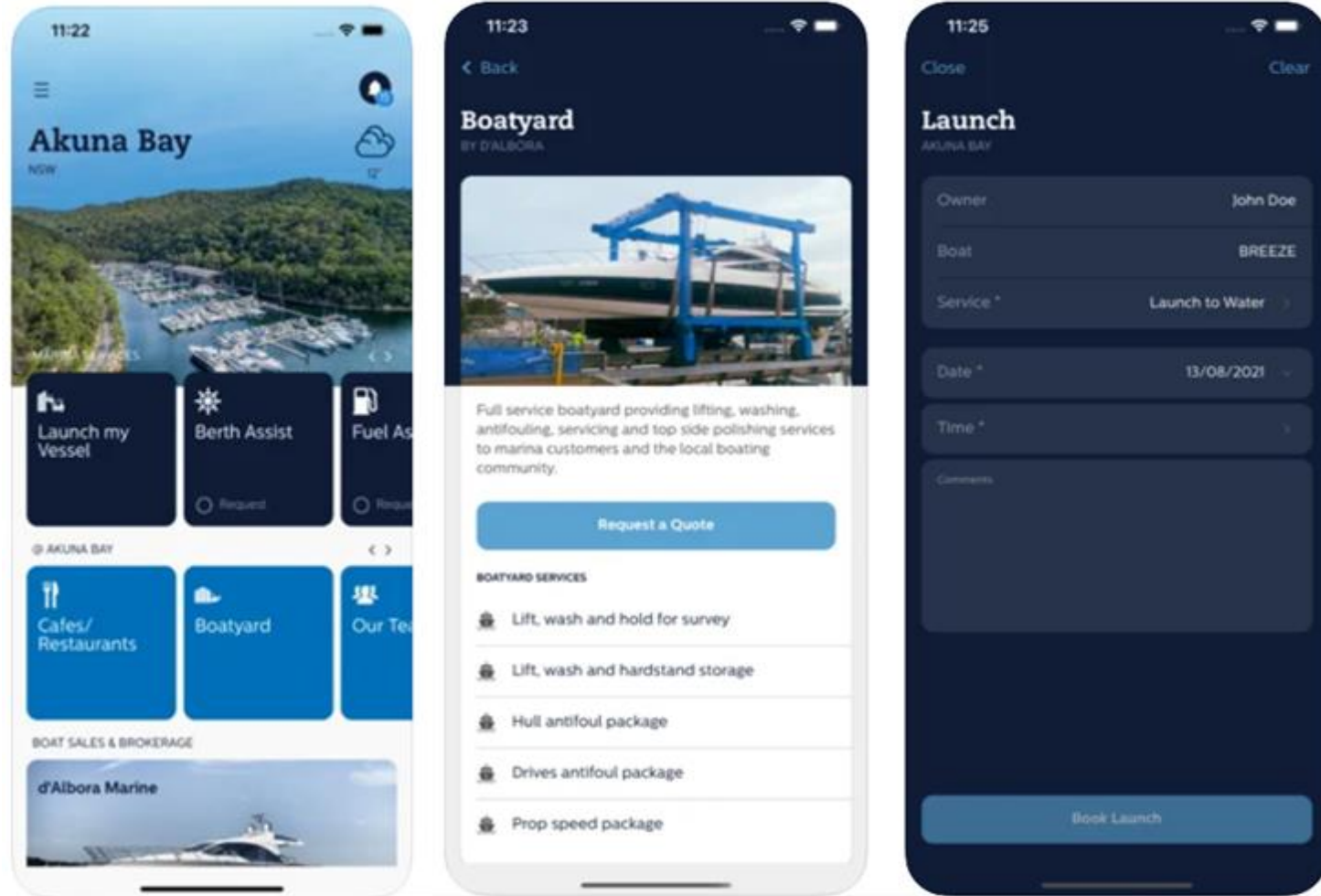
- Live Local Weather Forecast
- Latest Marina News
- Dining at Limassol Marina
- Cyprus Cruising Guide
- Official Limassol City Guide
- Visit Cyprus Tourism Guide

How can we help ...?

Request call back (07:30 to 20:00)

CRM BEST PRACTICES EXPERIENCE

Online dry store booking



CRM BEST PRACTICES EXPERIENCE

Online dry store booking

< Main menu

Crane - Insert

Owner *

Vesna Test

Boat *

Service *

Date *

Time *

Dear Vesna,

This notification

This is an autom

Should you have

Kind Regards,

Marina Staff

d'Albora

P 1800 DALBO

E enquiry@da

W www.dalbora

BERTHIN

10 PRE

Across

PORT OF AIRLIE | HORIZON S

Crane planning

☒ AKB - Launch ☐ DS Auto Retrieval

Date 25/11/2022

Marina location Akuna Bay

Crane

Lift operator

Service

Boat

Member

Search

Clear

Export to PDF

List view

Legend

Day Week Month

21/11/2022 – 27/11/2022

	Mon, November 21	Tue, November 22	Wed, November 23	Thu, November 24
09:00	10981 REG 10981	09:00 - 09:15 Cabin Cruisers 13818 REG 13818		
15		09:15 - 10:15 10474 REG 10474		
30				
45			09:45 - 10:15 10166 REG 10166	
10:00	10:00 - 10:10 10474 REG 10474			
15				
30			10:30 - 10:45 10476 REG 10476	
45		10:45 - 11:00 10981 REG 10981		
11:00	11:00 - 11:10 10476 REG 10476			
15		11:15 - 11:25 10959 REG 10959		
30				

< Service

22/11/22

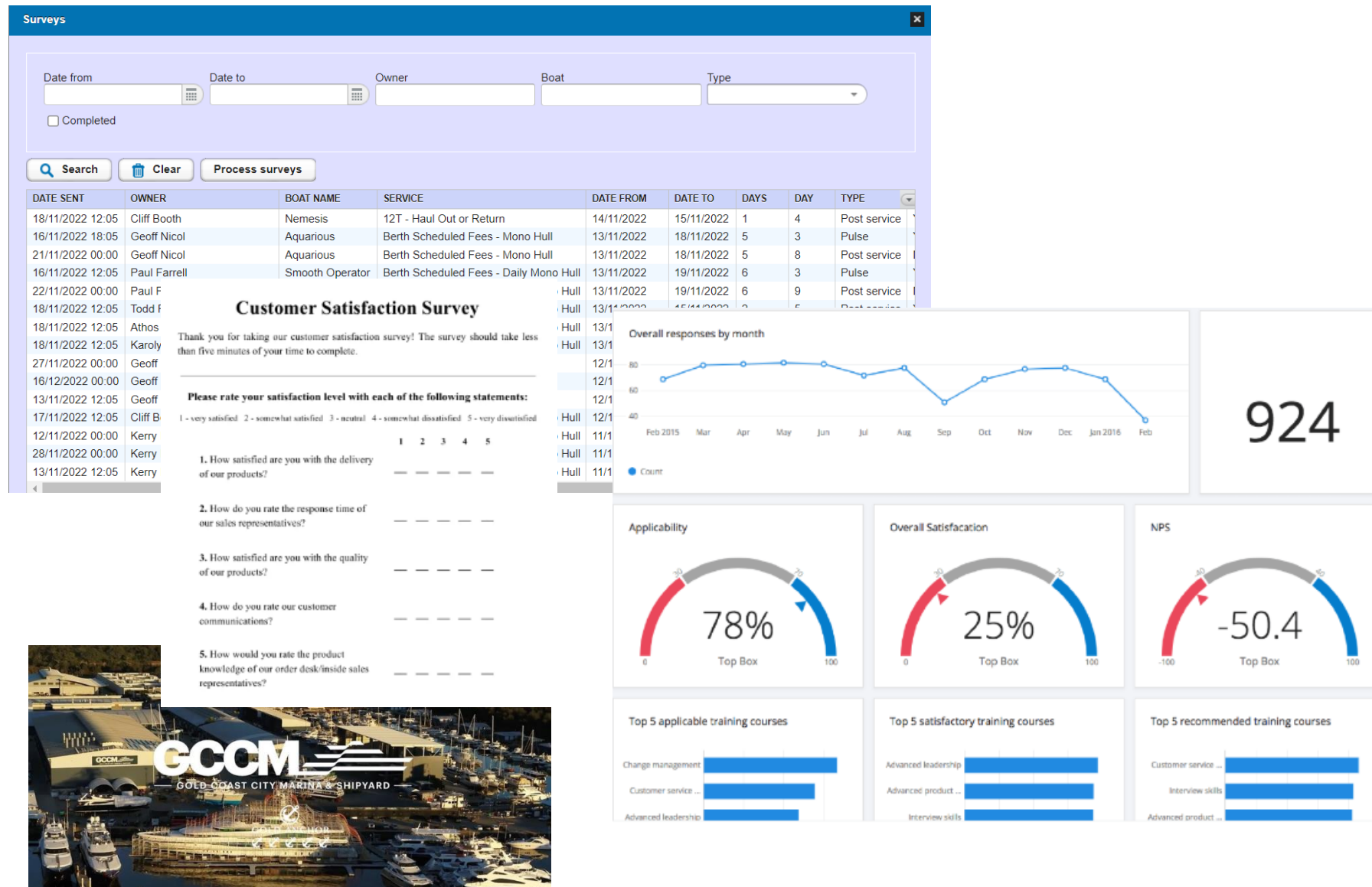
Refresh

Insert

Crane	Time from	Time to	Boat name	Member	Registration No.	Berth	Comment	Service	Add. services	Weight
AKB - Dry Store Forklift	09:00	09:15	Cabin Cruisers 13818	TEST Vesna	REG 13818		Cabin Cruisers 13818 REG 13818	Launch to Water		
AKB - Dry Store Forklift	09:15	10:15	10474	Last name 3	REG 10474		10474 REG 10474	Boatyard Launch		
AKB - Dry Store Forklift	10:45	11:00	10981	Last name 4	REG 10981		10981 REG 10981	Launch to Water		
AKB - Dry Store Forklift	11:15	11:25	10959	Last name 3	REG 10959		10959 REG 10959	Dry Store Lift		

CRM BEST PRACTICES EXPERIENCE

CX surveys



CRM BEST PRACTICES EXPERIENCE

Loyalty program



Loyalty program algorithms enable us to predict future customer visits, cash flow and customer retention triggers.

Automated loyalty program with customized rewards incorporates 3-tier levels with instant discounts, perks and vouchers features. Each membership tier has predefined parameters for transient dockage, merchandise and fuel services benefits.

CRM BEST PRACTICES EXPERIENCE

Loyalty program

Marina - 5881

Control Boat Owner Tools Services Finance CRM

Boat 1/1

Marina - 5881

Control Boat Owner Tools Services Finance CRM

Boat name
5881

Type

LOA
34.00

Cards

Insurance date

Owner

Surname
Last name 3756

Address
Address 3756

City
City 3756

Show

HRI code
80000396-1465311042

Type
Platinum

Temporary

Temporary

Contract - 0.00

Contract
SLIP

Reservation W

Reservation W
SLIP

Reservation Wish list

Reservation Wish list
SLIP

Boat 1/1

Marina - 5881

Control Boat Owner Tools Services Finance CRM

Boat name
5881

Type

LOA
34.00

Cards

Insurance date

Owner

Surname
Last name 3756

Address
Address 3756

City
City 3756

Show

HRI code
80000396-1465311042

Type
Platinum

Temporary

Temporary

Contract - 0.00 - 31/10/22

Contract
SLIP

Reservation W

Reservation W
SLIP

Reservation Wish list

Reservation Wish list
SLIP

Boat 1/1

Marina - 5881

Control Boat Owner Tools Services Finance CRM

Boat name
5881

Registration No.
REG 5881

Type

Manufacturer

Flag
USA

LOA
34.00

Beam
13.00

Show files

Cards

Co-owner-Broker

Member type
+50 per feet

Insurance date

Insurance policy No.

Owner

Surname
Last name 3756

Given name
Name 3756

Card ID

Address
Address 3756

Email
marinamastertest@gmail

Phone
015199121

City
City 3756

Postal code
02066

State
MA

Membership number

Show owner files

Parent customers

Cards

HRI code
80000396-1465311042

Send text
☒ Send text

Telephone
015199121

Type
Diamond

Temporary

Temporary

Temporary berth

Temp. from

Temp. until

Contract - 0.00 - 31/10/22

Contract
SLIP

Contractual berth
PTO-A-6

Contract from
05/15/2022

Contract until
10/15/2022

Reservation Wish list

Reservation Wish list
SLIP

Reservation berth
PTO-A-6

Reservation from
05/01/2022

Reservation to
11/01/2022

Vessel notes

Owner notes

Commercial information

Folder No.

Area

Balance
0.00

Group balance
0.00

Total received invoices
0.00

Commercial balance
0.00

Work orders

Services

OPEN SERVICES

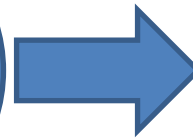
Deposits
0.00

Meters

CRM MANAGEMENT ANALYTICS

Reports and predictive analytics take center stage

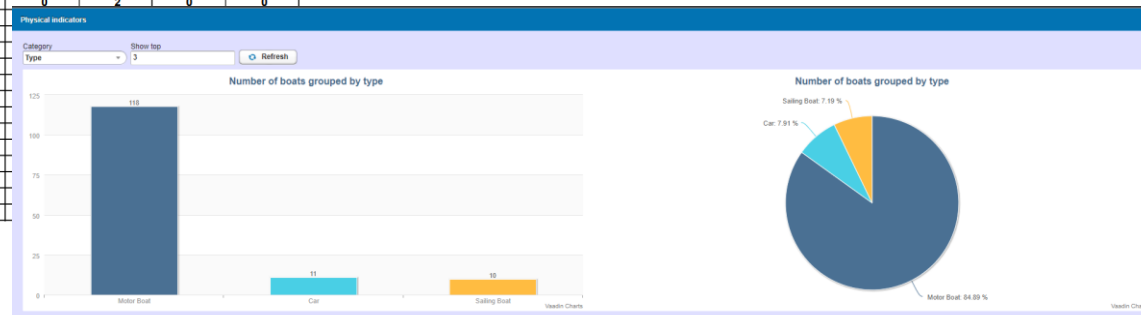
Marina Management needs complete overview of customer data, history & future reservations, behaviour and customized specific reports & analytics and more.



Marina Management is able to forecast marina situation, **customer behavior** in certain times of the year and more.

ENQUIRY YEARLY SUMMARY

		ENQUIRIES							ARRIVALS		DEPARTURES	
		Casual	Permanent	Flagship	Eclat	Wedding	Accom	Sailtime	Casual	Permanent	Casual	Permanent
Total	:2000/2001	45	29	0	0	0	0	0	2	0	1	0
Total	:2001/2002	49	33	0	0	0	0	0	1	1	0	0
Total	:2002/2003	123	49	0	0	0	0	0	0	2	0	0
Total	:2003/2004	126	59	0	0	0	0	0	0	2	0	1
Total	:2004/2005	165	81	0	0	0	0	0	0	0	0	0
Total	:2005/2006	199	64	0	0	0	0	0	0	3	0	0
Total	:2006/2007	179	84	0	0	0	0	0	1	6	0	1
Total	:2007/2008	196	101	0	0	0	0	0	1	0	0	1
Total	:2008/2009	197	78	0	0	0	0	0	0	2	0	0
Total	:2009/2010	189	108	0	0	0	0	0	0	0	0	0
Total	:2010/2011	229	106	0	0	0	0	0	0	0	0	0
Total	:2011/2012	260	98	6	0	0	27	0	0	0	0	0
Total	:2012/2013	257	113	42	0	0	150	0	0	0	0	0
Total	:2013/2014	254	108	43	0	0	99	0	0	0	0	0
Total	:2014/2015	220	149	44	0	0	106	1	0	0	0	0
Total	:2015/2016	266	128	65	0	0	232	0	0	0	0	0
Total	:2016/2017	287	159	63	11	23	202	45	0	0	0	0
Total	:2017/2018	310	183	74	7	18	100	37	0	0	0	0
Total	:2018/2019	362	180	72	13	7	108	46	0	0	0	0
Total	:2019/2020	422	193	78	5	7	101	67	0	0	0	0
Total	:2020/2021	542	218	80	17	5	103	165	0	0	0	0
Total	:2021/2022	438	147	59	9	3	34	104	0	0	0	0



CASE STUDY 1

Automation simple processes

Dear Last name 1010263,

with the present we would like to inform you that according to our records the following invoices amounting to **4.275,00 EUR** have not been settled yet.

Invoice	Value	Invoice due
Insurance expired		

Sadržaj *

B *I* U X_2 X^2

Background ▼ Foreground ▼ Font ▼ Size ▼

To whom it may concern

Insurance for your boat STAR TWO SJ has expired on (04.10.2022); therefore, we kindly ask you to send us the new insurance policy (third party liability and Casco hull and machinery) - confirmation of cover.

Thank you in advance.

Kind regards,

Marina Kaštela

Reception

CASE STUDY 2

Automatic digital contract renewal

Mr

Archive

Slip reservation system

Date from 11/01/2022 Nu 30

Marina location Charlestown Marir

☐ Only free

☐

Member

11/30/2022

Mon. 11.15. Tue. 11.1

CTO-A-19 (50 x 19 x 32)

A-13

A-15

A-17

A-19

A-21

Yacht 9045, 200.00

CASE STUDY 2

Automatic digital contract renewal

From: marinamastertest@gmail.com ☆

Subject: Invoice from Charlestown Marina, LLC

To: Tom B...

Date: 20/11/2022

Message ID: 15111111111111111111

X-Account-Key: 7911

X-UIDL: 15111111111111111111

Reply

Forward



Name 7911 Last name 7911

Address 7911

City 7911

USA

Invoice #: CTO-PAY151/22

Date: 20/11/2022

Account code: 7911

Original date: 20/11/2022

Description	Net	Discount	Tax	Amount
BOAT 10047				
Winter Seasonal Dockage -CTO / 11/01/2022 - 04/30/2023 / CTO-A-19 / BOAT 10047	\$3,500.00	0.00	\$0.00	\$3,500.00
Total:	3,500.00	0.00	\$0.00	\$3,500.00

Comment

Tax type	Tax rate	Tax	Amount
Exempt	0.00%	0.00	3,500.00

Payments:

11/20/22	Prepayment register Visa 1111	\$3,500.00
----------	-------------------------------	------------

Remaining Balance:

\$0.00

11 Pier 8, 13th Street

Charlestown, MA 02129

408-288-1111

Fax 617-325-2270

VHF: Channel 71

1 attachment: Invoice from Charlestown Marina, LLC.pdf 75,5 KB

marinaup
marina izola

Control Owner and boat Boatyard

e-mail Planiranje dvigala Analiza

Boat

Boat name

Communication - Owners

Notes
Activities
Emails
SMS
Boat notes
Services
Assistance required
Mailing

Date from
01.11.2020

Date to
20.11.2021

Type
Service

Filter
SERVIS

Boat

Payer

From marinamastertest@gmail.com ☆

Subject **Quote**

To Tone Britovšek ★

Cc ben@sagamoreblue.com ★

Date Mon, 21 Nov 2022 11:34:13 -0500 (EST)

Message ID <1369319506.9.1669048453549@service.irm.si>

X-Account-Key account2

Dear Jack,

please find your quote attached. To confirm, please click on the link below.

To secure your berth booking, a 10% reservation fee must be paid via our online payment gateway, [please use this link](#).

Kind Regards,

IRM

Dear Tone Britovsek

Your boat MAVI will be launched tomorrow at 11 AM

Staff at Marina UP

Mon 11:08

online payment gateway, [please use this link](#).

	Name	Last name	LIFTING	149.50	122.54	1.00	50.00	100.00	02.11.2021	02.11.2021	R3489/21	11.21-
<input type="checkbox"/>	JADRNICA 1023794	Name 10012021 Last name 10012021	LIFTING	149.50	122.54	1.00	50.00	100.00	02.11.2021	02.11.2021	R3489/21	11.21-
<input type="checkbox"/>	JADRNICA 1024764	Name 10013065 Last name 10013065	LIFTING	113.00	92.62	1.00		100.00	02.11.2021	02.11.2021	R3414/21	7,21-
<input type="checkbox"/>	MOT. ČOLN 1024805	Name 10013113 Last name 10013113	LIFTING	871.20	714.10	1.00	10.00	100.00	01.11.2021	01.11.2021	R3402/21	18,21-
<input type="checkbox"/>	MOT. ČOLN 1024340	Name 10012634 Last name 10012634	LIFTING	113.00	92.62	1.00		100.00	30.10.2021	30.10.2021	R3379/21	7,21-

Edit
Show owner options

Page: 3 / 124 (1232)

CRM TRENDINESS IN MARINAS - WHAT'S AHEAD?

CRM ARTIFICIAL INTELLIGENCE

ONE SYSTEM TO RULE: ERP & CRM INTEGRATION

MOBILITY & ACCESSABILITY FROM ANYWHERE?

AUGMENTED REALITY & VIRTUAL REALITY

SELF-SERVICE CRM

SOCIAL CRM

CHATBOTS



Thank you for your attention!

For any question
info@marina-master.com



the
docks
expo

