

Customer financing and insurance coordination

Automates the coordination of boat financing applications and insurance quotes when a customer expresses purchase intent, streamlining approval processes and reducing time-to-sale.

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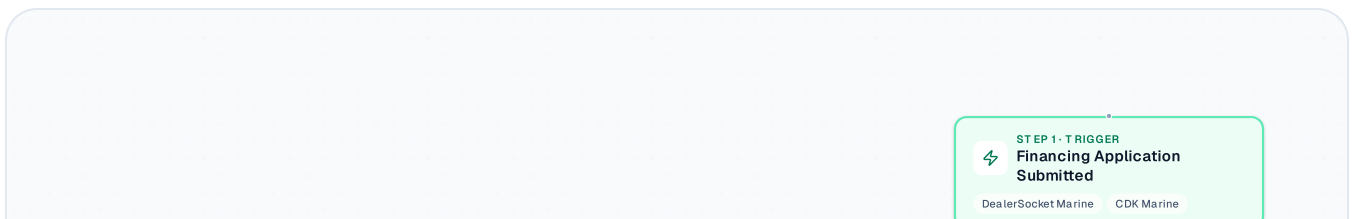
WORKFLOW TRIGGER

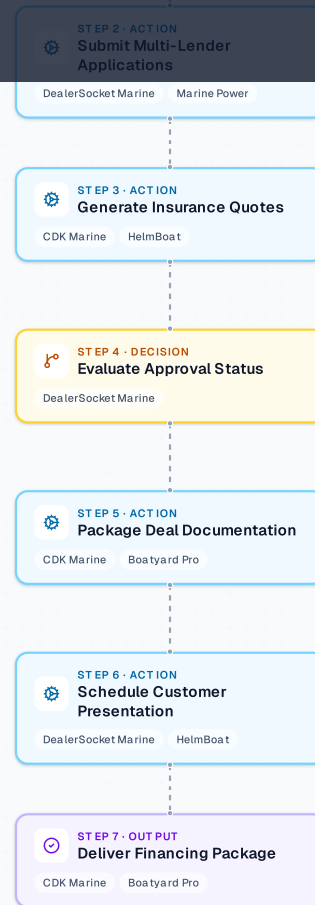


Customer submits financing application or requests purchase quote in dealer management system

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Financing Application Submitted

Customer completes financing application form or dealer initiates financing process during boat purchase consultation. System captures customer

2

 ACTION

Submit Multi-Lender Applications

System automatically formats and submits financing applications to multiple marine lenders simultaneously based on customer credit profile and loan amount. Applications include boat specifications, pricing, and customer financial information.

DealerSocket Marine

Marine Power

3

 ACTION

Generate Insurance Quotes

System sends boat specifications, customer information, and intended use details to marine insurance partners to generate comprehensive coverage quotes. Multiple insurance options are compiled for customer review.

CDK Marine

HelmBoat

4

 DECISION

Evaluate Approval Status

System checks financing responses and determines if customer has received acceptable loan terms from any lender. Workflow branches based on approval status and loan conditions.

DealerSocket Marine

5

 ACTION

Package Deal Documentation

AI Business OS

System compiles approved financing terms, insurance quotes, and boat purchase agreement into comprehensive deal package. All required disclosures and marine-specific documentation are included.

CDK Marine

Boatyard Pro

6

 ACTION

Schedule Customer Presentation

System automatically schedules appointment with sales team to present financing and insurance options to customer. Deal package is prepared for review and digital signature collection.

DealerSocket Marine

HelmBoat

7

 OUT PUT

Deliver Financing Package

Complete financing and insurance package is presented to customer with digital signature capabilities. All documentation is stored in dealer management system for deal completion tracking.

CDK Marine

Boatyard Pro



Outputs

AI Business OS

- Multi-lender financing approval package
- Comprehensive marine insurance quotes
- Complete deal documentation ready for signature



Key Metrics

- Time from application to package delivery
- Financing approval rate
- Average deal closure time



Tools & Integrations

- DealerSocket Marine
- CDK Marine
- Marine Power
- HelmBoat
- Boatyard Pro

AI Business OS

Actionable AI implementation strategies for business leaders ready to transform their operations.

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