

WHAT UNLOCKS WHAT

Roles in the Flowchart

Sales → Inquiry → Viewing → Invoice

Finance → Invoice → Payments → VAT

Admin → Overrides, audit, compliance

YACHT BROKERAGE CRM FLOWCHART

1. LEAD MANAGEMENT

Lead Source (Website/WhatsApp/Phone/Email/Referral/ Social Media)

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Lead Type → BUYER / SELLER

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Duplicate Check (Existing Client/Existing Yacht/Existing Company)

BUYER LEAD FLOW

Client Consultation (Within 24hrs)

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Buyer Questionnaire

- **Purpose (Private/Charter/Investment)**
- **Budget Range (Optional)**
- **Preferred Yacht Type (Optional)**
- **Desired Features and Customization Needs (Optional)**
- **Level of Boating Experience (Optional)**
- **Length Preference**
- **Brand Preference (Optional)**
- **Location**
- **Timeline (Optional)**
- **Additional Notes**

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Buyer Qualification

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Qualified?

YES → Client Registration (Client ID)

NO → Follow-Up Pool

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SELLER LEAD FLOW

Client Consultation (Within 24hrs)

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Seller Questionnaire

- **Yacht Make & Model**
- **Year**
- **Length**

- **Location**
- **Asking Price**
- **Ownership Status**
- **Loan/Mortgage (Optional)**
- **Reason for Sale (Optional)**
- **Timeline (Optional)**

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Seller Qualification

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Qualified?

YES → Client Registration

NO → Follow-Up Pool

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Client Registration (CRM)

- **Full Name**
- **Email**
- **Mobile Number**
- **Nationality**
- **Location**
- **Client Type (Buyer/Seller)**
- **EID/Passport (Optional)**
- **Additional Notes**

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Initial KYC/Compliance Check (Individual/Corporate Documents)

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Client Approved

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2. SELLER LISTING MANAGEMENT

Yacht Inspection

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Yacht Documentation

- **General yacht information**
- **Marketing materials**
- **Registration**
- **License**
- **Ownership**
- **Insurance**
- **Survey Reports**
- **Service History**

Valuation Process

- **Market Comparison**
- **Broker Valuation**

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Pricing Decision

- **Approved**
- **Adjusted**

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Listing Agreement (Exclusive/Open/Co-Brokerage)

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Listing Signed (Central Listing Agreement/Referral Agreement)

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Listing Activation

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Marketing Launch

- **Website**
- **Portals**
- **Social Media**
- **Broker Network**

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Auto Renewal Reminder

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3. BUYER MATCHING SYSTEM

Buyer Profile Created

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Agent Assignment

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Matching Engine (AI Yacht Recommendation)

- **Budget**
- **Length**
- **Brand**
- **Type**
- **Location**

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Matching Yacht Generated (Multiple)

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Shortlist Created

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Sent to Buyer (Through preferred communication channel)

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Buyer Feedback Logged

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Next Action Created

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4. VIEWING MANAGEMENT (Optional)

Viewing Request

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Buyer Verification

- **EID/Passport (Mandatory)**
- **Company Documents (Optional)**
- **Proof of Funds (Optional)**
- **KYC (Optional)**
- **LOI (Optional)**
- **VAT Status (Optional)**

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NDA Sent for Signature (Mandatory)

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Scheduling

- **Date / Time**
- **Marina / Location**
- **Broker Assigned (Senior Broker Assigned by Super Admin)**

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Viewing Conducted

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Feedback Captured

- **Interested**
- **Not Interested**
- **Follow-Up Required**

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Next Action

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5. OFFER MANAGEMENT

Client Consultation

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Yacht Matched

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Auto Generated Documents

- **Quotation (Optional)**
- **Commission Agreement (Optional)**
- **Invoice**
- **Yacht Purchase Agreement**

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Offer Submitted & E-Signature Process (Documents Automatically Sent for Signature)

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Offer Log Created

- **Buyer**
- **Seller**
- **Offer Amount**

- **Currency**

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Seller Response

- **Accept**
- **Reject**
- **Counter Offer**

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Offer History Tracking

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Upsell Opportunities

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Negotiation Cycle

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Offer Accepted

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Under Offer Status

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6. SURVEY & SEA TRIAL (Optional)

Survey Ordered

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Survey Report

- **Passed/Failed/Conditional**

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Sea Trial Scheduled

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Sea Trial Completed

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Result Evaluation

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Renegotiation (If Required)

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Proceed/Cancel Decision/Follow-Up Pool

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7. TRANSACTION PROCESS

Yacht Purchase Agreement Created (Documents Automatically Sent for Signature)

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Signed Agreement (E-Signature)

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Invoicing

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Final Payment Received

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Ownership Transfer Initiated

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Registration Update

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Insurance Update

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Transaction Completed

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8. Financial Flow

Deal Closed (Confirmed Sales Log Backend)

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- **Buyer Payment Received**
- **Total yacht price paid by buyer**
- **Payment confirmation sent**
- **Receipt issued**

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- **Seller Payment**
- **Agreed sale amount paid to seller**
- **Payment confirmation sent**
- **Receipt issued**

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- **Commission Breakdown**
- **Broker Share (Cost)**
- **Referral Share (Cost)**
- **Company Share (Income)**

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Company Profit Calculation (Total income – seller payment – commissions)

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- **Payments Processed**
- **Seller paid**
- **Brokers paid**
- **Referrals paid**

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- **Financial Closure**
- **All payments confirmed**
- **All receipts issued**
- **Deal closed in CRM**

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9. DELIVERY & HANDOVER

Delivery Scheduled

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Pre-Delivery Inspection

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Documentation Package Prepared

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Crew Briefing (Acknowledgement Form)

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Client Acceptance Form

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Handover Completed

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Delivery Certificate Signed

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10. POST-SALE MANAGEMENT

Follow-Ups (Automated System Reminders)

- **7 Days**
- **30 Days**
- **90 Days**
- **180 Days**

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Client Feedback

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Upsell Opportunities

- **Yacht Management**
- **Charter Management**
- **Maintenance**
- **Insurance**
- **Crew Services**
- **Upgrade / Trade-In**

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11. CRM PIPELINE STATUS

Buyer Pipeline:

Lead → Qualified → Registered → Matched → Shortlisted → Viewing → Offer → Negotiation → Survey → Yacht Purchase Agreement → Paid → Ownership Transfer → Closed Won/Lost

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Seller Pipeline:

Lead → Qualified → Listed → Active → Viewing → Offer → Negotiation → Under Offer → Survey → Sold → Closed Won/Lost

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Status Indicators (Color-Coded)

- **Green = Completed / Sold / Closed Won**
- **Blue = Active / In Progress**

- **Yellow = Pending Action / Follow-Up Required**
- **Orange = Offer Received / Under Review / Negotiation**
- **Red = Closed Lost / Cancelled / Rejected / Expired**
- **Grey = Draft / On Hold / Off Market**

12. YACHTS FOR SALE INVENTORY (BACKEND)

Create Yacht Profile

- **Yacht ID**
- **Make / Model**
- **Builder**
- **Year**
- **Length / Beam / Draft**
- **Engines / Hours**
- **Cabins / Guests / Crew**
- **Flag / Location**
- **Asking Price / Currency**
- **Full yacht specs**

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Media Upload

- **Photos**
- **Videos (Drone Footage)**
- **PDF**

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Yacht Documents Upload

- **Registration Certificate**
- **Yacht License**
- **Insurance Certificate**
- **Survey Report**
- **Ownership Documents**
- **Service History**

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Yacht Status (Draft/Available/Active Listing/Under Offer/Sold/Off Market)