

Hands on Skills Training

Event Conduct Manual

Content, Guidelines & Logistics

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PROMOTING THE BUSINESS OF BOATING

The Hands on Skills Training (HOST) program is an education program that was developed in the US and adapted in Canada. The HOST program has been offered to boaters across the country and has delivered the program to 1,240 consumers over a three year period. The idea behind the program was that training and education could be used as a tool to achieve a number of diverse business objectives while contributing significantly to increased boating safety and enjoyment. And, it could be accomplished cost effectively by centering these activities on a boat show or other major marine related event and then leveraging existing marketing and promotion activities.

HOST has proven to be a valuable and effective marketing tool when used in a specifically focused manner. Events that include hands on learning and skills building opportunities attract the right audience, produce higher quality “contacts” and generate better qualified prospects than free boat rides or passive demonstrations.

Importantly, HOST events are not just about skills training. The goal is to show how much fun boating is and how easy it can be with a few fundamental skills. Organized and executed correctly, these events build confidence and increase boating enjoyment and safety. The ultimate goal is to have participants walk off the boats so excited and enthused about boating they can’t wait to get back on the water again. While it’s critical to provide a quality educational experience, the *business* objective is to generate incremental boat, equipment, service and accessory sales by getting more people interested in boating and into the sales funnel. Learning new skills creates substantial motivation for more training and for boating and boat ownership.

The PRIMARY objective is to support the business of boating. These events have proven to be an effective, proactive selling tool. In short, well organized, professionally run events help sell products and services. And this classic cross marketing approach provides the perfect opportunity for many different segments of the marine industry to work together toward a common goal - grow boating - and at the same time, achieve their own individual business objectives.

PROGRAM OVERVIEW

Concept

Use HOST and education as a marketing/promotional tool to boost participation in boat shows and marine related events and get participants excited about boating. The ultimate purpose of the events is to generate more qualified prospects for boating – i.e., grow the volume of suspects and prospects in the sales funnel and accelerate the buying process.

Key Event Elements

- Experiential – Participants get a chance to learn and/or improve skills through a *hands-on* approach and instructors maximize “hands on time” (hands on experience increases purchase likelihood by 41%)
- It’s fun and entertaining with a tangible benefit – Increased knowledge, improved skills, enhanced safety = greater enjoyment
- Quality Learning Experience - Meaningful content geared toward specific audiences to attract newcomers and experienced boaters alike
- Third Party Credibility – Importantly, the event is conducted in a “soft sell environment” with training conducted by highly qualified and competent instructors with no direct stake in a boat sale.

Business Objectives:

1. Short term
 - a. Move people further along the sales funnel
 - b. Shorten the decision making timeframe
 - c. Heighten interest and enthusiasm among current boaters to trade up/down to a new(er) boat
 - d. Recapture lapsed boaters
2. Long term
 - a. Prospect Development
 - b. Establish new relationships
 - c. Promote the boating lifestyle
3. Create a relationship with the boating BRAND - foster loyalty

Prospect Development

The final objective with the events is to effectively transition the relationships developed during the events to retailers in a way that continues the relationship building effort and puts the seller in the best possible position to complete the cycle with a sale. To effect that transition and help deliver maximum benefits from HOST Activities, it is recommended that post event follow up programs be conducted within 3 weeks after the event (e.g. boat show). A well thought out, targeted follow up event that includes hands on continuing education will bring more highly qualified individuals and families to the dealer’s place of business and provide incremental prospects they may not have been able to reach otherwise. This idea is supported by the fact that 67% of event participants over the course of the program have reported that they are interested in additional training. Successful execution of this strategy will help dealers develop their markets more effectively and result in incremental boat sales.

EVENT FORMAT & LOGISTICS

EVENTS are operated independently and are the responsibility of event organizers.

1. All instructors should be qualified and capable to provide this type of training.
2. All events should have appropriate Liability Coverage.
3. All participants should sign waivers.
4. All participants/operators should have their PCOC.
5. All events should be operated in accordance with Transport Canada and Office of Boating Safety regulations.

1. “Clinics Format” (see appendices for example of event schedule)

- a. 60 minutes each
- b. Number of sessions/day - flexible (generally 3-5)
- c. 4 participants aboard with instructor

2. Curriculum - (flexible based on target audience)

- a. Introduction to Fundamentals of Close Quarters Boat Handling

3. Training Vessels - number & type flexible depending on market/show needs,

- a. Boat needs to be an average size (under 24 feet)
- b. Boat should have a steering wheel/outboard engine (to allow user to connect their inputs to how the boat behaves)

INSTRUCTORS

EQUIPMENT (*must have all required safety equipment*)

1. Vessels

- a. Sourced through dealers/manufacturers, boat clubs, training schools, exhibitors
- b. Transport Canada required safety equipment and hull/P&I provided by boat source

2. PFDS

- a. All instructors and participant wear inflatable PFDS while underway

3. Fenders

4. Dock lines (at least 6 per vessel)

FACILITIES REQUIREMENTS

1. Event Information/Registration Centre - ashore

- a. Minimum 10 X 10 space (10 X 20 preferred)
- b. With tent/canopy including 3 sides
- c. Two tables & 4 stool type chairs
- d. Dockage for training vessel(s)
- e. Electrical service (if laptop or other electrical device is needed)

SHOW/EVENT PRODUCER RESPONSIBILITIES

1. *Promote events*

- a. Via Local media
- b. Email invitations to customers and prospects
- c. Participant websites and social media
- d. Website, social media and Data Bases (follow CASL guidelines)

2. *Events prominently featured as major attraction*

- a. Provide marketing, promotion & PR support (*example of Event Promotional Copy for website in appendices*)
- b. Website copy
- c. Media promo event
- d. Exhibitor communications
- e. Provide directional signage
- f. Provide method for participant to register prior to the event (e.g. Regonline)

3. *Provide Slips and Equipment*

- a. Setup/breakdown
- b. Canopied booth space at/near docks w/tables and stools (10 x 20) with 110 AC

EVENT CONTENT

Clinic - Fundamentals of Close Quarters Boat Handling

This is geared to newcomers and lapsed experienced boaters who seek a refresher program with expert instructors and includes the following:

- a. Importance of a docking and departure plan and crew communication
- b. Understanding and using vessel controls/inputs - shifters, steering and throttle
- c. Understanding and managing momentum
- d. Stopping under control and stopping distances (including urgency stop method)
- e. Backing down in a straight line
- f. 360 degree pivot turns in small spaces
- g. Docking bow first in a slip
- h. Docking alongside a pier (fuel dock)

INSTRUCTOR GUIDELINES

Instructor Objectives

1. Promote boating and the boating lifestyle - each instructor is an ambassador for the sport, your own schools/businesses and the marine industry entities that make these events possible.
 2. Provide an outstanding learning experience for all participants - we want everyone to walk away very excited about boating - so much so that they can't wait to get back out on the water. The instructor's primary task is to show EACH participant how much fun boating is and how it's so easy that anyone can operate a boat with a few simple skills.
 3. Ultimately, the goal is to promote the **business** of boating. Ideally, the experience encourages non-boaters to be more open to boat ownership, lapsed boaters to reconsider their decision to leave the sport and rekindle the passion and enthusiasm that got existing boaters into the sport in the first place.
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General Instructor Guidelines

- Foster an atmosphere of safety - the dealer/staff/owner/operator are all responsible for the safety of passengers, crew and the vessel and has a responsibility to all others on the water.
- Maintain a congenial but professional demeanor at all times. Instructors must set the example particularly with respect to safety and responsibility.
- Take personal responsibility for each participant's experience. The complete satisfaction and enjoyment of each participant is the instructor's goal.
- Provide a quality learning experience with maximum fun factor. Adjust your teaching approach to each individual not vice versa. Emphasize fun and enjoyment and if they learn a few skills along the way this just adds to the experience.
- Maximize hands on participation. Keep all participants engaged especially when they are awaiting their turn at the helm.
- Maximize participant helm time. Instructors should limit their time at the helm to a simple demonstration of a skill or technique and let participants discover by doing rather than watching.
- Maintain event schedule awareness. Where time allows, sessions may be extended if possible.
- Pre-departure safety briefing - you set the example:
 - Include caution i.e. - vessel movement, hand holds and where not to stand, sit, etc.
 - Location and use of all required Transport Canada safety equipment
 - Correct fitting of PFD. Instructors and participants must wear PFDs while onboard and underway. Inflatables must be provided for all persons
 - Line handling and equipment safety
 - Fenders and fending off - no body parts
- Importance of obtaining an up to date weather report & filing a float plan.
- Importance of pre-departure critical systems check
 - Discussion and highlights only
- Instructors will check vessels out daily before class except where pre-departure check is part of the curriculum.
- Docking plan - discuss and demonstrate formulating a departure and docking plan and need for thorough communication with crew.

APPENDICES

Event Schedule Examples

Capacity 80	Fundamentals of Close Quarters Boat Handling			
	Boat 1	Boat 2	Boat 3	Boat 4
10:00 to 11:00	Event 1	Event 2	Event 3	Event 4
11:30 to 12:30	Event 2	Event 3	Event 4	Event 1
1:00 to 2:00	Event 3	Event 4	Event 1	Event 2
2:30 to 3:30	Event 4	Event 1	Event 2	Event 3
4:00 to 5:00	Event 1	Event 2	Event 3	Event 4

NOTES: 4 persons per boat plus instructor. The schedule above has a capacity of 80 persons

Email Invitation Example

Improve Your Boating Skills At “insert event name here”!

Nothing beats hands-on experience for improving your boating skills or learning new ones. This year's show features a full schedule of ***hands-on, on-the-water*** boating workshops. There's something for everyone—from absolute beginners to seasoned skippers! **You'll learn from experts:** All sessions are taught by certified professional instructors.

One-Hour Workshops

Learn through hands on, on-the water exercises. Limited to four persons per boat.

- Basic Docking and Fundamentals of Close Quarters Boat Handling

Advance registration highly recommended.

CLICK HERE (insert registration link here) for more details, daily schedule and online registration.

Event Promotional Copy (Website Example)

“Insert event name here” presents **hands on** skills building *CLINICS* for boaters. Each event is 60 minutes long. Participation is limited to 4 persons per boat. These effective learning events will help develop skills that will last a lifetime and add significantly to your boating safety and enjoyment.

Fundamentals of Close Quarters Boat Handling

Hone your docking skills and practice close quarters manoeuvring with a professional, certified instructor. Learn the fundamentals of boat control in confined spaces including how to confidently manoeuvre close to other boats, piers, docks and fixed objects. Participants will also learn how to turn around in tight spaces, back down a narrow channel in a straight line and other important docking and manoeuvring skills. It’s designed for all boaters who wish to increase both competence and confidence in docking situations.



Advance Registration is Highly Recommended

These hands on training clinics are designed for boaters of all skills levels who are physically able to participate as an active crewmember while underway.

Participants may also register for clinics during the boat show on a space available basis. Participants in these boat CLINICS must be able to participate as an active crew member while underway.

Participants can register for clinics at “insert registration link here”

Please use the [Discover Boating Toolkit and Image Gallery](#) for images to include in your event promotional copy

Event Registration & Waiver Example

The **"insert show name here"** is pleased you are participating in the "Hands-on Skills Training" program at **"insert location and date here"**, hereafter referred to as the "Event".

I, _____, ("the Participant") by signing this waiver fully

please print name

and completely, release, discharge, indemnify and hold harmless the **"insert additional named insurers here"** and their managers, contractors, commissioners, suppliers, exhibitors, directors, officers, employees, sponsors, manufacturers, instructors, trainers, safety personnel, agents and members, and/or assigns and each of them, from and against any and all actions, causes of action, claims, demands, liabilities, losses, damages, costs or expenses, of whatsoever kind and nature, on account of any actual or alleged loss, including any injury to or death of any persons (including me or my minor children), or any loss of, through theft or otherwise, or damage to, property arising in any way in connection with my participation in any activity related to the Event and including the use of equipment, devices, or boats furnished to or used by the Participant, or other persons in connection with the Event (whether such loss, injury or damage should arise as a result of negligence or otherwise).

I recognize and understand that my participation in the Event and/or that of my minor children is voluntary and free of charge.

I have my PCOC card. If you do not have your PCOC card on your person, please initial here _____ to indicate that you accept responsibility if you get a ticket while boating with the Hands-on Skills Training program.

I am pleased to and do hereby expressly assume the risks associated with any liability for such loss, injury or damage.

I understand my participation and/or that of my minor children may result in my party getting wet and understand the risks associated with it.

I understand the Event holds the right to refuse my participation or that of my minor children and/or the right to reschedule my assigned time or Hands-on Skills Training requested at the complete discretion of the Event organizers.

I give my full consent to **"insert names here"**, its legal representatives and all those acting with its authority and permission, the absolute right and permission to copyright, use, publish and exhibit the photographic portraits or other pictures, video images and audio recordings of me, that its agent, has taken without any compensation, other than that receipt of which is hereby acknowledged. I hereby warrant that I am of full age and have every right to contract my own name in the above regard, or if signing for a minor, I have every right to contract for the said minor named below.

I have read, understood and agree to the terms and conditions as set forth herein.

By (signature): _____ Date: _____

By (printed name of participant): _____

I am signing on behalf of minor children (please check)

Yes

No

Names of Minors who you are signing on behalf of (please print)

Address: _____

City: _____ Province: _____ Postal Code: _____

E-mail Address: _____ Phone (in case of emergency) _____

PLEASE COMPLETE THE FOLLOWING

BOAT OWNERSHIP? No _____ Yes , Power _____ Yes, Sail _____ Yes, Power & Sail _____ Past Owner _____

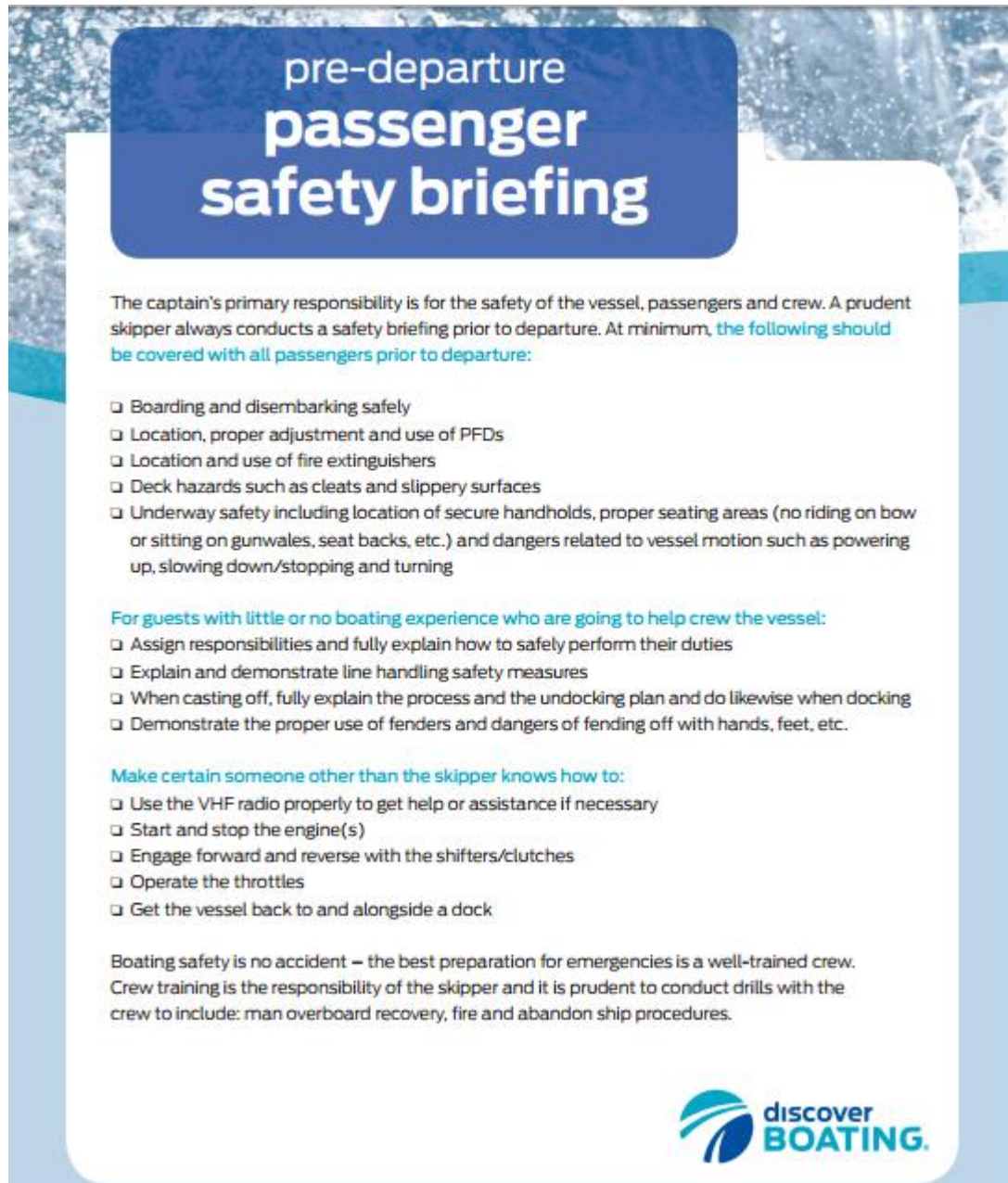
BOATING EXPERIENCE? New/Beginner _____ Intermediate _____ Advanced _____

PRIOR HANDS ON TRAINING? None _____ Training Organization _____ Friends/Self Taught _____

INTERESTED IN ADD'L TRAINING? Yes _____ No _____

CONSIDERING A BOAT PURCHASE? No _____ Yes, < 6 Mos _____ Yes, 6 to 12 Mos _____ Yes, > 12 Mos _____

Pre-Departure Passenger Safety Briefing (Handout)

The graphic is a handout titled "pre-departure passenger safety briefing". It features a blue header with the title in white. Below the header, there is a paragraph about the captain's responsibility, followed by a list of items to be covered with all passengers. Then, there is a section for guests with little or no boating experience, followed by a list of items to make certain someone other than the skipper knows how to. At the bottom, there is a paragraph about boating safety and the Discover Boating logo.

pre-departure passenger safety briefing

The captain's primary responsibility is for the safety of the vessel, passengers and crew. A prudent skipper always conducts a safety briefing prior to departure. At minimum, **the following should be covered with all passengers prior to departure:**

- ❑ Boarding and disembarking safely
- ❑ Location, proper adjustment and use of PFDs
- ❑ Location and use of fire extinguishers
- ❑ Deck hazards such as cleats and slippery surfaces
- ❑ Underway safety including location of secure handholds, proper seating areas (no riding on bow or sitting on gunwales, seat backs, etc.) and dangers related to vessel motion such as powering up, slowing down/stopping and turning


For guests with little or no boating experience who are going to help crew the vessel:

- ❑ Assign responsibilities and fully explain how to safely perform their duties
- ❑ Explain and demonstrate line handling safety measures
- ❑ When casting off, fully explain the process and the undocking plan and do likewise when docking
- ❑ Demonstrate the proper use of fenders and dangers of fending off with hands, feet, etc.

Make certain someone other than the skipper knows how to:

- ❑ Use the VHF radio properly to get help or assistance if necessary
- ❑ Start and stop the engine(s)
- ❑ Engage forward and reverse with the shifters/clutches
- ❑ Operate the throttles
- ❑ Get the vessel back to and alongside a dock

Boating safety is no accident – the best preparation for emergencies is a well-trained crew. Crew training is the responsibility of the skipper and it is prudent to conduct drills with the crew to include: man overboard recovery, fire and abandon ship procedures.

The logo for Discover Boating, featuring a stylized blue wave icon to the left of the text "discover BOATING." in a sans-serif font.

Make sure to take advantage of the many resources found the in the Discover Boating toolkit such as pre-departure checklist, vessel checklist, knot tying guide, spring start-up checklist and trailering checklist. Please visit discoverboating.ca/tools.