U.S. Department of Homeland Security
United States Coast Guard Auxiliary

A Plan for Effective US Coast Guard Auxiliary and US Coast Guard Interaction for Operations and Support

Implementing Strategies for Success

RP Recommendations
APR 2014

Auxiliary Strategic Plan Initiative

Introduction

"The purpose of the Auxiliary is to assist the Coast Guard as authorized by the Commandant in performing any Coast Guard function, power, duty, role, mission or operation authorized by law." - 14 USC 822

The RP team was asked to identify elements of the Strategic Plan that applied to the activities of their Directorates. The team identified these elements; and used them to develop a comprehensive plan for Coast Guard and Auxiliary interaction for support of operations. The elements identified were:

A.1.b.i. (1) Identify and promote levels of CG operational support: Backfill and Targeted Augmentation. Promote Auxiliary unit relationships with counterpart CG units to develop working interactions to support A/D operations and Auxiliary training and support. Provide support to better enable Auxiliary leadership at District level to work proactively with CG District staff, Divisions to liaise with Sectors, and Flotillas with Stations

A.1.b.ii. (2) Encourage local units to determine backfill requirements for their counterpart CG units in terms of resources and other items. Identify support needs and match them with Auxiliary resources and develop plans for handling shortfalls, such as training and recruitment courses. Provide links to Skills Bank for Targeted Augmentation.

A.1.b.iii. (3) Support development of mechanisms to monitor and communicate local unit capabilities to the counterpart CG units with the goal of establishing awareness at all CG levels of Auxiliary capabilities to support their operations. Provide mechanisms to maintain data integrity.

Strategies & Tactics

Promote Auxiliary District interaction with Coast Guard units at all levels. Auxiliary District leadership should establish a close working relationship with the area Coast Guard District leadership so that they can assist and support Sector and local Auxiliary operations. – Auxiliary Strategic Plan 4.A.1.b.ii.

To further our Strategic Goals and better fulfill our mission of assisting the Coast Guard, it is important for the Auxiliary to develop close working relationships with Coast Guard units. We must learn their needs and understand and develop Auxiliary capabilities that can help meet those needs when possible. This should happen at the District level with the CG District organization, at the Division level with Sector organization and at the Flotilla level with Station organizations.

"They know all about the Auxiliary. They'll call when they want us."

Many Active Duty personnel are unfamiliar with the Auxiliary, have had a bad experience, or worse, may have heard uncomplimentary things about the Auxiliary organization. Even those who are generally familiar with and have a good opinion about the Auxiliary need to be informed about specific resources and capabilities the Auxiliary can provide them. We should never make the mistake of assuming that Coast Guard unit commanders are familiar with the Auxiliary, are aware of what we can do for them or are aware of how to employ us to meet their mission objectives.

Marketing - Blowing Our Own Horn

Accordingly, part of what we need to do involves marketing the Auxiliary and the services we can provide to the Coast Guard, just as if we were marketing or selling any other commodity or service. To be effective, this promoting process needs to occur at the unit level and must constantly be repeated on a regular basis and as the CG unit personnel and leadership change.

Marketing is responsible for presenting the product to the market place in a way that grabs attention in its ability to meet the customers' needs. A solid marketing plan is also designed to increase the number of interactions between the service provider and its customers. That's what we need to do with our interactions with the Coast Guard. We want to increase the number and effectiveness of those interactions and create an awareness of what we have to offer.

To put this into action, the leadership of each district should think of itself in the context of being a sales and marketing organization. Senior leadership should work in coordination with subordinate unit leaders to reach all of their respective Coast Guard units with a consistent and planned message.

Just as we do some pre-mission organization and planning before embarking on an Auxiliary mission on the water or in the air, we need to do some preliminary work before we set out to call upon Coast Guard unit leaders. Our pre-interaction mission checklist should include:

- Organizing the Sales Force – Who does what?
- Estimating the customer's needs – What do we think they want?
- Understanding our Product – Exactly what Auxiliary resources are available locally or regionally and what can they do?
- Knowing how to effectively interact with Coast Guard unit leaders
  - How do we make an effective "sales call"?
  - How do we make an effective presentation?

When we meet with CG unit commanders, we need to make the meeting an effective use of time. We should ask the customer what their goals or objectives are. Equally important is to determine the two or three things that have to go absolutely right for each objective to be achieved. These things are called Critical Success Factors (CSFs). Once we know what these (CSFs) are for each objective or goal, we can align our resources with them to offer solutions that support the achievement of their goals.

Most importantly, we have to follow through and deliver on our commitments. We need to ensure that we can provide whatever we say we will provide, in a competent, professional manner.

After we have provided service, we need to follow up with our customers to confirm they are satisfied. This is our opportunity to offer further services as well as learn how to improve our services. This follow-up is a key to delivering consistent quality.

“We’re from the Auxiliary, and we’re here to help.”

Auxiliary interaction with Coast Guard units has to happen at the District, Division and Flotilla level. There is nothing that can be done at the National level of the Auxiliary that will make this interaction occur. However, the National Auxiliary organization can provide assistance to help local Auxiliary units interact with local CG units more effectively. This document includes some of that assistance including “best practice” guidance, recommendations and templates for briefings and “sales” meetings. Some of these items include:

- Recommended approaches to:
  - Developing a sales organization
  - Marketing strategy
  - Using the Staff to help anticipate the CG units needs and requirements.
- Guidance to help members understand basic sales techniques.
- Guidance to leaders on assessing their local Auxiliary capabilities.
- Recommendations for creating a “virtual catalog” of local Auxiliary capabilities.
- Assistance in ensuring that all Auxiliarists’ qualifications and skills are properly recorded in AUXDATA and/or the Auxiliary Skills Bank and that all Auxiliary leaders are familiar with the Skills Bank.
- Guidance on measuring and recognizing performance.
- Create a template to be used in meetings to ensure a consistent message

These suggested “best practice” guidelines are based on industry proven sales techniques, adapted to the Auxiliary. District leaders are encouraged to consider these suggestions and adopt them as they deem appropriate, to stimulate improved interaction with their counterpart CG units, resulting in greater opportunities for Back Fill and Targeted Augmentation.

Building a Sales Team

Each DCO may think of themselves as the Marketing Manager of their organization. Their sales team includes the elected leaders at all levels of their district as well as many key staff members. Together, the team should develop a plan for making contact with the Commanding Officer of each Coast Guard unit in their district.

There are some locations where this marketing concept and sales team is already in place and working well; sometimes organized around ASCs or AUCs, sometimes by unit leaders. In these places, this guide may be helpful as a job aid. In other locations, the team can be built utilizing these and other key members.

Although the organization of the team will vary from district to district, the goal is the same. The goal is to have a face-to-face meeting at which the Auxiliary “sales person” can introduce themselves to the Coast Guard leaders, learn about the "customer" needs and introduce Auxiliary solutions to those needs. Just as in a commercial sales context, our Auxiliary sales force must keep lines of communication open with the customer to gain feedback on product performance, address needed changes and look for additional opportunities to provide service.

Effective sales organizations employ a cascading structure in which the senior leaders participate by calling on their senior business counterparts. Lessons learned and information gained in those meetings is passed to the rest of the sales force. Applied to the Auxiliary, this provides excellent leadership opportunities for Auxiliary officers. DCOs may engage with District Commanding Officers, DCAPTs and or DCDRs may engage with Sector COs and DCDR or FCs with Station COs. ASCs, AUCs and Staff are ideally situated to begin this process and should be engaged as subject matter experts and as "sales staff", as appropriate.

In the commercial sales environment, it is not uncommon for a senior executive, a company Vice President or even the President, to accompany a sales person on an initial sales call to a new customer. This is done to demonstrate to the customer that their business is important to the company and that the sales person has the full backing of the leadership of the company. In the Auxiliary context, it is likewise recommended that a unit elected officer accompany each Auxiliary "sales person" during their initial visit to a CG unit CO. This is an opportunity to reinforce the Auxiliary's commitment to the CG from the top down.

When organizing the district sales team, it is important to include a feedback loop in order to monitor the effectiveness of each sales call. Just as in the commercial environment, the sales manager should:

- Receive timely information on the outcome of each sales call,
- Be informed on what commitments were made,
- Be updated on any difficulties that were encountered, and,
- Participate in developing the plans for follow up.

Similarly, the Auxiliary sales team should plan to track their "sales":

- What commitments were made?
- What kinds of Back Fill or Targeted Augmentations activities were planned?
- What new kinds of interaction activity resulted (or will result) from the sales activity?
- What areas do we need to "qualify" an Auxiliarist to meet USCG needs?

Before the initial sales call, some preparation is in order. DCOs and other leaders should engage with relevant staff in order to gather as much information about the customer as possible in advance of the meeting. Efforts should be made to estimate the CG Unit's needs and match them with Auxiliary resources, in advance of the initial sales meeting. Debrief Auxiliarists who currently interface with the command. Try to determine the CO's key objectives. Sometimes those are posted on the bulletin board as "Commanders Intent" messages, so it pays to look. Try to identify how the Auxiliary is currently engaged with the unit. Who does what, at what levels, when? How are they engaged? How well is that working?

Because the customer may have unanticipated needs, the Auxiliary sales force must be prepared with specific knowledge about all of their available resources. For example, it's not enough to know that there are some boats available, they must also know how many boats, when and where are they available, what kind are they and how are they crewed. Completing a job aid, such as the "Operational Capabilities" forms (attached) will help collect and organize that information. Each Auxiliary unit should collect this information on their resources and compile it into a virtual "catalog" of capabilities.
This self-assessment must extend beyond the traditional Auxiliary resources of surface, air and communications facilities. Are there language interpreters available and if so, what languages? Are there Auxiliary Food Service specialists' available, members with clerical skills, and so on?

Completing a job aid, such as the "Operational Capabilities" forms (attached) will help collect and organize that information. Each Auxiliary unit should collect this information on their resources and compile it into a virtual "catalog" of capabilities.

Coast Guard units may have a need for many different types of skill sets for Back Fill and Targeted Augmentation support, so Auxiliary leaders have to think far beyond our traditional response and marine safety activities. A critical tool for accessing this information is the Auxiliary Skills Bank.

> Exploit Skills Bank implementation and explain its capabilities to Coast Guard units. To be able to be of service to the Coast Guard, the Sector must know who is available, where they are, what skills and/or facilities they have, and how to contact Auxiliarists quickly. The Skills Bank is such a tool. Auxiliary unit leaders at all levels should make their Coast Guard counterparts aware of the Skills Bank and how to access it. Members must enter their unique talents into the Skills Bank in order for it to be effective. Goal is for 25% of the membership to be entered into the Skills Bank by 31 October 2014. - Auxiliary Strategic Plan 4.A.1.b.iv.

Unlocking the Skills Bank

Most Auxiliarists are familiar with the Auxiliary Directory. The Skills Bank is a similar but much more powerful tool capable of customized searches for not only various Auxiliary qualifications, but for civilian or personal skills and qualifications. This makes it a vital resource for identifying members with a wide variety of skill sets. Although it can search on Auxiliary qualifications, just like the Auxiliary Directory, it can also search on whatever non-traditional skill sets have been entered by the membership. So, if you need a coxswain within 30 miles of your sector, the Auxiliary Skills Bank can generate a list of them. If a unit needs, say, a carpenter, a quick search of the Skills Bank will generate a list of anyone who listed that skill on their 7028. Searches can be customized in many ways.

The Skills Bank can be an invaluable tool, allowing the Auxiliary to provide needed resources to both the Coast Guard and the Auxiliary. It is accessible via links on the National Auxiliary website, including Q-Directorate pages. A Skills Bank User Guide and training tutorials are posted to insure that Auxiliary leaders at all levels understand how to use the Skills Bank and are aware of its benefits to the Coast Guard and the Auxiliary.

The Skills Bank also provides a valuable management tool for Auxiliary and Coast Guard Leadership. It provides a "snapshot" of all the members or officers meeting the search criteria, with all their skills and qualifications displayed. For example, by searching for all Division Commanders in a District, Auxiliary or Active Duty leaders may quickly locate all their team members, along with their full contact information and skill and qualification data,

Auxiliary unit leaders should be very familiar with the Skills Bank and use it to assess their unit's capabilities. When meeting with CG Unit commanders, the Skills Bank should be featured as an important tool that the CG unit can use to gain access to Auxiliarists for Back Fill and Targeted Augmentation. Because the Skills Bank is only as useful as the information members enter into it, Auxiliary leaders are asked to encourage members to enter their information and keep it updated.

Our Product – Back Fill (BF) & Targeted Augmentation (TA)

Our message to Coast Guard Units should be "Here is what we can do for you!" and not "What can you do for us?" So what can we do for the Coast Guard? We often think in terms of our "traditional" activities, operating boats, radios and planes. And we should be aware of some of the "non-traditional" skills we can offer, too. But what do all of those activities have in common? They provide support or augmentation to the Coast Guard, especially in time of crisis.

The assistance that we can provide to Coast Guard units can be classified into two broad types of activity: Back Fill (BF) and Targeted Augmentation (TA). Each of those types of activity can be conducted at various levels of intensity.

<u>Back Fill may be defined as:</u>

> Maintaining the local unit's standard (required) operating tempo by replacing positions and functions vacated (i.e., "Back Filling") when the Active/Reserve/Civilian member is mobilized and sent to an incident, or when they may be temporarily unavailable. These needs should be identified well in advance, before the need for Back Fill exists. Examples of these functions could range from manning the phones, processing Marine Permits (or any other administrative paperwork), COMMS Watch standing, food preparation, to standing SAR duty.
>
> The local Sector/Unit should be encouraged to PRE-IDENTIFY these positions, and working through the Auxiliary Sector/Unit Coordinator, identify members who can fill these needed positions. Back Fill may range from a single position to multiple positions. Training may be necessary for Auxiliarists to qualify for needed positions.
>
> Back Fill needn't be used only when there is a crisis. Opportunities to Back Fill may exist when A/D members are away for training, leave or family emergencies.

Auxiliary units may offer to Back Fill to allow station personnel to have additional holiday leave or morale time. Such Back Fill opportunities allow Auxiliarists to practice their skills in order to remain proficient.

Targeted Augmentation (TA) may be defined as:

Providing specific targeted resources to the USCG. This refers to the actual embedding of trained/credentialed Auxiliarists into the Sector/Unit's resource needs as requested. These are generally specific skill set(s) or qualification(s), i.e., Interpreter, Carpenter, Trident PQS, Type 3 Planning Section Chief, Coxswain, etc. The Auxiliary Skills Bank, Auxiliary Officer Directory or AUXDATA may be used to search for members with the requested skills or qualifications.

Auxiliary surface and air patrols are a specific type of Targeted Augmentation. Other examples of TA could include:

- A station has need of a woodworker for a repair project.
- A station has need of a radio Watchstander
- A sector needs a photographer to record an event.
- A station needs someone with computer / web design experience to maintain the unit's web site.
- A station may need a qualified instructor of TCT or ICS.

TA may be needed on a continuous or an intermittent basis.

Both Back Fill and Targeted Augmentation are scalable from single to multiple positions or from a single to multiple skill(s)/qualification(s). The intensity of these two kinds of activity can range from the every-day "Ops Normal" Steady State to an elevated "All hands on deck" level to accommodate intense Surge Operations or during the Deliberate and/or Crisis Action Planning cycle(s).

Once these positions are identified the Sector/Unit will ensure proper position training and logistical requirements are provided (i.e., "dot mil" email set up, training, issuance of equipment etc.) Discussions should be initiated as to whether this training/support needs to be provided prior to the request or would Just In Time (JIT) Training be adequate? Auxiliary unit leaders, as well as CG COs, should be familiar with COMDTINST 5400.1A: Obtaining Personnel Resources to meet Surge Requirements (attached).

Planning the Sales Call

Well before the actual sales call, the pre-call intelligence gathering should be completed and the available Auxiliary resources carefully evaluated. The participants in the call need to be identified; who will serve as the "sales person", who will accompany them? Pre-determine the roles and responsibilities of each member of the sales team. Who will lead, who will be the ongoing point of contact (POC), who is a subject matter expert?

Keep Your Sales Call up to PAR

At the outset of the meeting, the senior Auxiliary officer should introduce his/her team and briefly explain their roles. If the senior Auxiliary officer is there to provide support, and will not be running the meeting, this is the time to express support for the "salesperson" that will be the POC in the future.

Part of any successful sales call must be the PAR statement. In this context, PAR stands for Purpose, Agenda, and Return. The PAR statement organizes the sales call by quickly addressing the questions that the customer is likely to have about the meeting. Those customer questions include:

- "Why are you here now?" What is the **Purpose** of your call?
- "What do you intend to do?" What is your **Agenda**?
- "What's in it for me?" What is my **Return** on the investment of my time?

By addressing this early in the meeting, you respect the customers' time and make it easier for them to listen to what you have to say.

Purpose – "Why are you here now?" implies four additional questions.

- Why – Asks the reason for the call.
- You – Asks why you are the one making the call.
- Here – Asks why you are calling on this unit and this commander.
- Now – Asks why you are making the call at this particular time.

In your opening statement, you want to address as many of these questions as possible. For example:

> "Commander Jones, as the Division Commander of Division 99, I've been working to see how we might be able to help you meet your needs during surge operations as well as during steady state operations. I'm here today with Flotilla Commander Smith to ensure that we understand your priorities, and that we align ourselves to support your needs."

Agenda – The agenda part of the statement simply states how you would like to use the meeting time and allows the customer to confirm that agenda is acceptable. For example:

> "In the next half hour, I'd like to ask a few questions to ensure that the Auxiliary will leverage our strengths to address your highest priorities. Is there anything else that you'd like to add to that agenda?"

Return – This part of the statement tells the CG Unit commander what they can expect from the investment of their time today. How will they benefit?

Note that this is focused on how the CO will benefit, not on how you or the Auxiliary will benefit. It also needs to be focused on how the CO will benefit from this particular meeting, not from some future activity.

For example:

"Commander, by the time we conclude today, I expect to identify resources that can be used to help meet your requirements for Back Fill during surge operations and for Targeted Augmentation for surge ops and steady state ops."

CSF – "What does the Customer need?"

Now that the meeting has started and you've gotten down to business with the PAR statement, the next focus of the sales call is to find out what the customer's priorities are. Those customer priorities are called Critical Success Factors (CSFs). The concept of CSF is to identify those activities most critical to achieving the CG Unit leader's objectives. Typically, a given business objective will have two or three, generally less than five, CSFs. Next, match Auxiliary capabilities to those CSFs. Obviously, the key is to identify the customer's CSFs while not overstating capabilities.

So, how do we determine the customer's CSFs? We ask them! "Commander, what are your goals for the unit?"

Now, the CO may reply with a laundry list of goals. You need to cut it down to size to about three or four. Once you have a clear understanding of priorities, it's time to drill down further to determine what factors are critical to the achievement of the highest priority objectives. You might ask: "Commander, what are the two or three things (CSFs) that must go absolutely right for you to achieve that goal (pick one)". If the Commander hesitates, push the envelope by asking; "Which of those factors keeps you up at night?"

As you drill down on each key priority, look for some alignment with your Auxiliary unit resources and capabilities with the needs stated by the CO in order to meet his/her goals. It's best if you can do this on the spot, but if you need to go back and meet with your team to develop solutions, don't be afraid to say that. Obviously, the better prepared you are with knowledge about your Auxiliary capabilities, the greater the chances are that you will be able to propose solutions during the meeting.

A good rule of thumb – listen more than you speak. This is your opportunity to learn about your customer. You must first seek to understand what's going on in the other person's world. Then and only then will your ideas be accepted and understood by the customer.

Ask open-ended questions (who, what, where, when, why, how, how much, tell me about it, describe for me). Ask "what if?" questions.

Remember to remain focused on your customer's needs. Summarize those needs and how your proposed solution will address those needs. Seek agreement that your proposed solution solves the identified problems and provides the value expected. Assure them that you will be following up after the BF or TA activity to give them an opportunity for feedback.

When you have done that, you are ready to wrap up. But before you do, "close the sale":

- Seek agreement from the CO that the solution you proposed is acceptable. “Why don't we go ahead with this?”
- Briefly restate your objectives (from the PAR) and confirm all agreements that were made
- Set the date and time of any follow up meetings. Don’t forget to thank the CO for their time; and then don’t dawdle or waste time, be on your way.

After the meeting, send the CG leader a written follow up. Thank them for their time, reiterate your meeting objectives and confirm all agreements made. Copy your chain of leadership as appropriate.

The CG AUX-CG Sales Call Planning Job Aid (attached) is a handy summary of these steps in outline form.

Follow Up – Service after the Sale

The initial “sales call” meeting with the CG Unit leader is just the beginning step. The follow-up is the vital next step: the “Sales Team” needs to develop a plan or review local capabilities to enable a response to be developed to meet the needs of the CG unit.

Auxiliary leaders should thank the active duty leaders for their time and attention to our message. All agreements need to be confirmed. Auxiliary staff and other members of the leadership chain should be briefed on the outcome of the meeting. An agenda should be developed for issues that need follow-up and further reporting. Dates must be set for the agenda items. Progress should be tracked at monthly intervals and members and units who perform well should be recognized. <u>Most importantly, once we have learned what the unit’s needs are and have offered our services to meet those needs, the Auxiliary must deliver.</u>

Quality = Customer Satisfaction

We must deliver a quality product. That means that our offering must fully meet our customer’s requirements. When called upon to provide BF or TA, Auxiliary units must deliver with professional competence and pride.

To ensure this, we need to have a process to monitor our performance, collect customer feedback and make necessary improvements. In business this concept is known as Quality Assurance, and this should be part of our planning.

Things to keep in mind for the Quality Assurance Process:
- Ensure that members are suitable, qualified and appropriately trained for the intended service. Members must be punctual and must keep any scheduling commitments made to the CG unit. Members must be neat, well groomed, in correct uniform and professional in appearance and demeanor. Active Duty personnel must see that we do our job well, and adhere to unit standards. We must demonstrate through our actions that we are safe, competent and professional.
- Be prepared to train members as necessary to meet customer needs or to improve their performance. Does the CG unit have needs that the Auxiliary

cannot fill, but we could fill if we had additional resources? Does the Auxiliary unit need to train some current members or recruit people with certain skills? If so, what needs to be done to accomplish that?

- Does the Auxiliary Unit have a plan to mobilize resources when they are needed? Is the Auxiliary Incident Management System (AIMS – *Everbridge*) fully implemented in your district? AIMS is a powerful tool for reaching the membership. Insure that members are familiar with it and practice with it frequently
- Auxiliary leaders at the appropriate level must monitor the performance of the Auxiliarists who participate in BF and TA activities to insure that we deliver on what we committed to. Do our members perform well or do they need additional training? Do they present themselves in a professional manner? Do they follow through on commitments? Follow up with the CG unit leader for their “after action” feedback.

The Auxiliary should provide knowledgeable and professional services which meet our and Coast Guard standards. When called upon, the Auxiliary needs to deliver. As the saying goes, you don’t get a second chance to make a good first impression.

Repetition, Repetition, Repetition

It’s not enough that we present our message to the Active Duty unit once. One meeting with the CO of a station is great, but it’s just a start. Auxiliary Units must develop a plan for ongoing communication with the unit. If we want A/D leaders to think of the Auxiliary, we need to expose them to our message multiple times.

If you’ve ever watched a sporting event on television, you may have noticed that there isn’t just one beer commercial. Rather, they are repeated over and over at every opportunity. Likewise, if we want Active Duty leaders to retain and act on our message, we need to present our message repeatedly. Of course, we’re not selling beer, so we don’t need to pester our customer needlessly. But appropriate periodic contact should be part of every marketing plan.

Beyond the issue of message retention, we must remember that active duty personnel at every unit change on a continuing basis. Those who are unfamiliar with the Auxiliary need to learn what we are and what we can do for them. As the active duty personnel change, we will need to repeat our message to them.

All of this means that the Auxiliary “sales force” must develop an appropriate marketing plan for each CG unit, a plan which involves anticipating the customer’s needs, planning a “sales call” meeting with the CG Unit leader, conducting the meeting to introduce our product to the customer and ask the customer about their needs, and following up appropriately.

As the CG unit’s leaders change, the unit goals will likely change as well. Accordingly, the Auxiliary marketing team must remain flexible to accommodate changes.

Build Enduring Relationships

Auxiliary Units can build and strengthen relationships with Coast Guard units in many ways. The greater the trust and confidence the CG unit has in the Auxiliary, the more likely there will be opportunity for Back Fill and Targeted Augmentation activities.

Most importantly, it's vital that the Auxiliary not be a "fair weather friend" to the Active Duty unit. We should strive to be known as the people who pitch in to make life easier for the A/D members.

Even when not directly engaged in BF or TA activities, members should be engaged with the CG unit. Invite appropriate CG personnel to Change of Watch, picnics, and other social events to strengthen personal relationships. Consider offering active duty personnel complimentary admission. Can Auxiliarists assist in mentoring young men and women or assist in other support activities? Attend CG parades, Change of Command and award ceremonies and other events when invited. Support unit Morale, Well-Being and Recreation (MWR) activities. Consider establishing awards that recognize joint cooperation between gold and silver side, to be presented to those most supportive of cooperation the gold side. Encourage contributions, when possible and appropriate, to CG Welfare and other charitable needs that arise.

It's all about building mutual trust and personal relationships. That's the secret to building any long lasting business and that's the path to improved CG / CGAUX interaction.

APPENDICES & JOB AIDS

The following appendices contain job aids and selected templates that can be used as guides for preparing for "sales team" visits and briefs to the local CG units. Users are encouraged to adapt them as necessary to local requirements.

The Operational Capabilities documents may be used to create a virtual catalog of unit capabilities. Units may wish to consider providing the CG Unit with a "virtual catalog" or "Briefing Book" developed from these documents.

APPENDIX A

CGAUX / CG Support AUX "Sales Call" Planning Job Aid

Before –

- Pre-sales call intelligence gathering
    - Debrief Auxiliarists who currently interface with the command
    - What are the command's key objectives?
    - Identify how the Auxiliary is currently engaged.
    - Determine Auxiliary unit's statistical baseline level of support.
    - Identify / Assess available Auxiliary resources.

- Planning the call
    - Who will accompany the Auxiliary unit leader?
    - Pre-determine your sales team's roles and responsibilities
        - Unit leader
        - POC / Mission SME

- Create a PAR to open the call
    - Purpose – Why are you here now?
    - Agenda – What do you intend to do?
    - Return – What's in it for me (the customer)?

- Internalize and rehearse the following model
    - Open conversation (Greetings, Introductions, then PAR)
    - What are your objectives & goals?
    - Which are the most important three or four of those? (Prioritize them)
    - What are the two or three things that have to go right for you to achieve that goal? (Seeking Critical Success Factors)
    - Which is most important? (What one keeps you up at night?)
    - Look for alignment w/ AUX resources and capabilities (either on the spot or at a new appointment)

During –

- Making the call
    - Follow model above
    - After introductions, Auxiliary unit leader delivers the PAR
    - Auxiliary unit leader conducts discovery (as in model above)–
    - What are the CG Unit's CSFs
    - Prioritize
    - How do AUX resources align to support them
    - POC/ SME provides overview / or
    - Adjourn to analyze and agree on a future meeting to present solutions

- Concluding the call
    - Thank CG Leader for their time
    - Reiterate your objectives (from the PAR)
    - Confirm all agreements including date / time of future meetings

After –

- Send Written Follow up
  - Thank CG Leader for their time
  - Reiterate your objectives (from the PAR)
  - Confirm all agreements including date / time of future meetings

- Auxiliary unit leader briefs their staff / leadership
  - Report on commitments made, issues encountered
  - Provide ongoing follow-up at monthly staff meetings
  - Compare levels of support to statistical baseline
  - Provide recognition where appropriate

APPENDIX B

Flotilla/Division ___ Operational Capabilities Back Fill Scenarios

Flotilla/Division _________ is situated to assist CG Station/Sector__________________ with needed support for Back Fill operations.

Flotilla Locations:_______________
Number of Members:_______________.

Members and their facilities are distributed around the AOR, many easily accessed and capable of Bravo ___response for Back Fill or augmentation.

Communications:

Commander:_______________________________
Operations Contact:_________________________

Radio Capability:

Back Fill Support

The Everbridge system to enables the activation of any element of the Flotilla/Division. The Skills Bank has details on _____ members of the unit listing their civilian skills and employment skills.

Facilities and Crew

Operational vessel facilities consist of ___ vessels and ___ PWCs
Details on these vessels and crew and their capabilities are in Appendix B and C.

Radio Facilities
In addition to vessels, the members also operate ___ Auxiliary mobile radio facilities and ___ fixed land radio facilities, several with multiple VHF and HF capability. ___ of the radio facilities have HF capability.

Watchstanders
_____ of the members are qualified CG Watchstanders

Other BF functions.
The unit contains:
_______AUXFS qualified members
_______Assistant OD qualified members
_______Auxiliary Assistant Barge Inspector
______Auxiliary Assistant Container Inspector
______Auxiliary Assistant Contingency Planner
______Auxiliary Assistant Facility Inspector

_______Auxiliary Assistant Federal on Scene Coordinator Representative
_______Auxiliary Assistant Foreign Freight Vessel Examiner
_______Auxiliary Assistant Foreign Passenger Vessel Examiner
_______Auxiliary Assistant Hull Inspector
_______Auxiliary Assistant K-Boat Inspector
_______Auxiliary Assistant Life Raft Inspector
_______Auxiliary Assistant Machinery Inspector
_______Auxiliary Assistant Machinery Inspector – Steam
_______Auxiliary Assistant Marine Casualty Investigator
_______Auxiliary Assistant Maritime Enforcement Investigator
_______Auxiliary Assistant Pollution Responder
_______Auxiliary Assistant Port State Control Examiner
_______Auxiliary Port State Control Dispatcher
_______Auxiliary Assistant Suspension and Revocation Investigator
_______Auxiliary Assistant T-Boat Inspector
_______Auxiliary Uninspected Passenger Vessel Examiner
_______Auxiliary Uninspected Tow Vessel Examiner
_______Auxiliary Assistant Waterways Management Representative
_______Commercial Fishing Vessel Examiner (active duty qualification)
_______ ____
_______ ____
_______ ____

APPENDIX C

Back Fill Vessel Detail

The following pages detail the information on vessels and coxswains proposed as the primary call-out facilities.

Flotilla ___ Vessel Call-Out Detail

Response Time Bravo: ___

Vessel Name: _______________________ Auxiliary ID: __________________

Reg#____________

Owner(s): ____ EMPID:

____

Vessel Location: ____

Lat:________N Lon:________W

Telephone: _______________________ Cell/Boat Phone:______________________

VESSEL DATA Make: _____________________ Model_ _________________

Type__________________________ LOA: _________Beam: ________

Draft:__________ MMSI: ________________ Engine(s): Single__ Twin__ Gas___

Diesel___ HP:_____ Range: Generator ___ kW___ Speed (Top)______kts

(Cruise)______kts Communications: VHF (#units)_____ DSC ___HF___ EPIRB: ___

Safety Light ___ GPS Chartplotter ___ RADAR: ___ Depth Sounder___ Other

Equipment____

Pictures: Clearly display side and rear views. Provide view of helm station if possible

APPENDIX D

Flotilla___ Coxswain/Crew Call-Out Information

Response Time, Bravo: ____

Name: ____

Auxiliary ID: __________________

Vessel ID:__________________

City ____

Telephone: ______________________ Cell:_____________________

DATA

BQ Date: ___________________ Qualification: CX: Crew: Trainee:

AUXOP: CG License: OUPV: Master: _____Tons

Years boating experience_______

Other ____

Other Qualifications:

First Aid___ EMT:____ TCO______ Other:________

APPENDIX E

Flotilla Resources and Capabilities

Flotilla Commander:		Home			Cell -							
Operations Officer:		Home			Cell -							
Owner Name	Phone # AREA CODE	Cell Phone	Owner ID	Class Length	Facility Name	Facility ID	Deployment Bravo Time <1, 2, 6,12,24 hours	Trl Y/N	Offshore Capable	Lat. DD-MM.M	Long. DDD-MM.M	Status A,B,C
COXSWAINS:												
PWC OPERATORS:												
WATCHSTANDERS:												
AIRCRAFT QUALFICATION:												

PREVENTION QUALIFICATIONS

NAME	QUALIFICATION	PHONE # AREA CODE	CELL PHONE #	DEPLOYMENT Bravo Time <1,2,6,12,24 hours

APPENDIX F

Sample Chart indicating **capability of flotilla vessel and crew to be on-scene from B0 status:**