

Winter Storage Owner Toolkit

Winter storage: checklist, yard comparison,
handover, work approvals and final checks

A practical tool to document what has been agreed, approved and
completed from boatyard handover through to launch.

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How to use the toolkit

The toolkit can be completed on a computer or tablet and can also be printed. It does not replace manufacturer manuals or the boatyard contract; it creates an orderly record of decisions, approvals and checks the owner wants to retain.

ONBOARD principle: define the scope first, then compare the price. Any additional activity should be identified and approved before it becomes a cost.

01 BOAT DETAILS

BOAT NAME

MODEL / TYPE

LENGTH OVERALL (LOA)

MAXIMUM BEAM

ENGINES

HOME PORT / MARINA

PLANNED HAUL-OUT DATE

PLANNED LAUNCH DATE

02 STORAGE DETAILS

BOATYARD / FACILITY

CONTACT PERSON

PHONE / E-MAIL

AGREED PERIOD

OBJECTIVE / MAIN NOTES FOR THIS STORAGE PERIOD

Pre-haul out checklist

Before handover, define what must be documented, what the boatyard needs to know and what should not be left implicit.

01	☐	Haul-out, storage and launch dates confirmed in writing	NOTES
02	☐	Quotation and commercial terms filed	NOTES
03	☐	Included and excluded services clarified	NOTES
04	☐	Operational contact identified	NOTES
05	☐	Technical data required for lifting communicated	NOTES
06	☐	General condition of the boat photographed	NOTES
07	☐	Personal items and sensitive materials removed	NOTES
08	☐	Keys and access items to hand over identified	NOTES
09	☐	Already-approved work listed separately	NOTES
10	☐	Rule for additional work agreed	NOTES
11	☐	External technicians allowed / not allowed defined	NOTES
12	☐	Insurance cover and responsibilities understood	NOTES

Boatyard quotation comparison

Enter up to three quotations and bring them onto the same scope. Where a service is not included, enter the expected extra cost or add a note.

	Boatyard A		Boatyard B		Boatyard C	
Haul-out	INCLUDED?	EUR / NOTES	INCLUDED?	EUR / NOTES	INCLUDED?	EUR / NOTES
Hull wash						
Cradle / supports						
Movements						
Shore storage						
Security / supervision						
Water / power						
Cover / protection						
Periodic checks						
Launch						
Other						
LIKE-FOR-LIKE TOTAL						

Boatyard decision scorecard

Cost is only part of the decision. Score each criterion from 1 to 5 and apply the same logic to every boatyard.

CRITERION	BOATYARD A 1-5	BOATYARD B 1-5	BOATYARD C 1-5
Quotation clarity Clear inclusions, exclusions and terms.	-	-	-
Service completeness Scope matches the boat's actual needs.	-	-	-
Management of extras Clear proposal and approval process.	-	-	-
Handling Equipment, procedures and capacity appropriate for the boat.	-	-	-
Security / safeguarding Access, surveillance and care of the boat.	-	-	-
Communication Contact, response time and quality of information.	-	-	-
Operational flexibility Coordination of timing, outside technicians and unforeseen events.	-	-	-
Overall value Balance of cost, service, transparency and control.	-	-	-
FINAL ASSESSMENT / REASON FOR CHOICE 			

Boatyard handover record

A well-documented handover reduces ambiguity. Record the condition of the boat, the items handed over and the agreed operating conditions.

HANDOVER DATE / TIME

HANDED OVER TO

HANDED OVER BY

LOCATION / YARD AREA

01 CONDITION AND ITEMS HANDED OVER

☐ Keys / remote controls

☐ Documents / manuals

☐ Tender / accessories

☐ Canvas / covers

☐ Equipment or spares left on board

OBSERVED CONDITION / PRE-EXISTING DAMAGE / PHOTO NOTES

AGREED RULE FOR UNQUOTED / ADDITIONAL WORK

OWNER / REPRESENTATIVE SIGNATURE

BOATYARD SIGNATURE

Work authorization register

Record any work that arises after the initial quotation. Keep the sequence visible: proposal -> cost -> approval -> close-out.

DATE	WORK / REASON	QUOTE EUR	OK?	APPROVED BY	STATUS / NOTES

Storage inspection log

If inspections are planned during storage, use this page to leave a simple, verifiable record. Frequency should be agreed for the specific boat and systems.

DATE	CHECKED BY	BATTERIES	BILGE	HUMIDITY	COVERS	ISSUE / ACTION
		-	-	-	-	
		-	-	-	-	
		-	-	-	-	
		-	-	-	-	
		-	-	-	-	
		-	-	-	-	

Key: OK = no issue found | Attn. = requires attention / follow-up.

Pre-launch checklist

Before launch, confirm that approved work is closed, systems treated for lay-up are restored and any outstanding points are explicit.

☐	01	Approved work checked against work actually completed	
☐	02	Hull / underwater body ready for launch	
☐	03	Anodes and replaced components checked	
☐	04	Seacocks / components affected by work checked	
☐	05	Engines ready for recommissioning under the applicable procedures	
☐	06	Generator ready for recommissioning	
☐	07	Batteries connected / charged / tested as planned	
☐	08	Water systems restored and checked	
☐	09	Bilges clean and in proper condition	
☐	10	Plugs / drains / components removed for storage reinstated	
☐	11	Outstanding work identified and documented	
☐	12	Invoices / progress claims / extras received or expected clarified	
☐	13	Launch date and time confirmed	
☐	14	Post-launch check planned	

Final cost summary

Reconstruct the actual cost of the storage cycle. Keep the initial quotation, approved extras and final total separate.

CATEGORY	QUOTATION	APPROVED EXTRAS	FINAL	NOTES
Haul-out / launch				
Storage / security				
Wash / hull				
Cradle / movements				
Engines / generator				
Systems				
Materials / spares				
Other work				
INITIAL QUOTATION TOTAL	APPROVED EXTRAS TOTAL		FINAL COST	

Close-out and next-season notes

Close the storage period with a record of what remains open and the information that will be useful next season or at the next lay-up.

01 OUTSTANDING ITEMS

02 NOTES FOR THE NEXT STORAGE PERIOD

03 DOCUMENTS / EVIDENCE TO ARCHIVE

☐ Initial quotation / order	
☐ Storage terms	
☐ Handover / haul-out photos	
☐ Additional work approvals	
☐ Work reports / photos	
☐ Invoices / final documents	
☐ Pre-launch / post-launch photos	

From seasonal control to year-round control.

Winter storage is only one of the phases where costs, maintenance, approvals and documents can become scattered across quotations, messages, invoices and notes.

THE ONBOARD METHOD

Budget. Commitments. Payments. Variances.

To apply the same level of control throughout the year, Boat Cost Control PRO organizes costs, maintenance, suppliers, boatyard work and refit in one system.

DISCOVER BOAT COST CONTROL PRO



Note: the toolkit is an organisational tool. Technical activities must be defined for the specific boat and according to the relevant manufacturer instructions. Contractual and insurance conditions should be checked against the applicable documents.