

# PGA of America



# The Value of Mentorship

Mentoring and leadership are indeed vital components of professional development for PGA Associates. By working closely with your Associates, you not only help them grow and achieve PGA Membership but also uplift the standards of your team and organization. Here are a few strategies to effectively mentor your PGA Associate:

- ❖ **Set Clear Expectations:** Clearly communicate your expectations regarding their roles and responsibilities. Provide guidance and set goals that are both challenging and achievable.
- ❖ **Provide Regular Feedback:** Constructive feedback is essential for growth. Regularly review their progress, celebrate their successes, and address areas needing improvement.
- ❖ **Lead by Example:** Demonstrate the professional standards and behaviors you expect from them. Your actions as a leader serve as a powerful lesson.
- ❖ **Encourage Professional Development:** Encourage your Associates to participate in additional training, seminars, and other learning opportunities.
- ❖ **Facilitate Networking Opportunities:** Introduce them to industry contacts and encourage them to build professional relationships.
- ❖ **Create a Supportive Environment:** Ensure they feel supported and valued. Encourage open communication where they can express concerns and seek advice.
- ❖ **Empower Decision-Making:** Allow them to take ownership of certain decisions and projects to build confidence and skills.
- ❖ **Acknowledge Achievements:** Recognize their hard work and accomplishments publicly and privately. This boosts morale and reinforces positive behavior.

By actively engaging in these practices, you can significantly enhance the performance and development of your PGA Associates, leaving a lasting impact on their careers and your organization.



## PGA PGM ASSOCIATE MENTORING GUIDE

# PATHWAY TO PGA MEMBERSHIP

## Associate Pathway Requirements:

- PGA.org
- Background check
- Qualifying level
- Playing Ability Test
- Eligible Employment
- Associated Costs

## Affiliate Pathway Requirements:

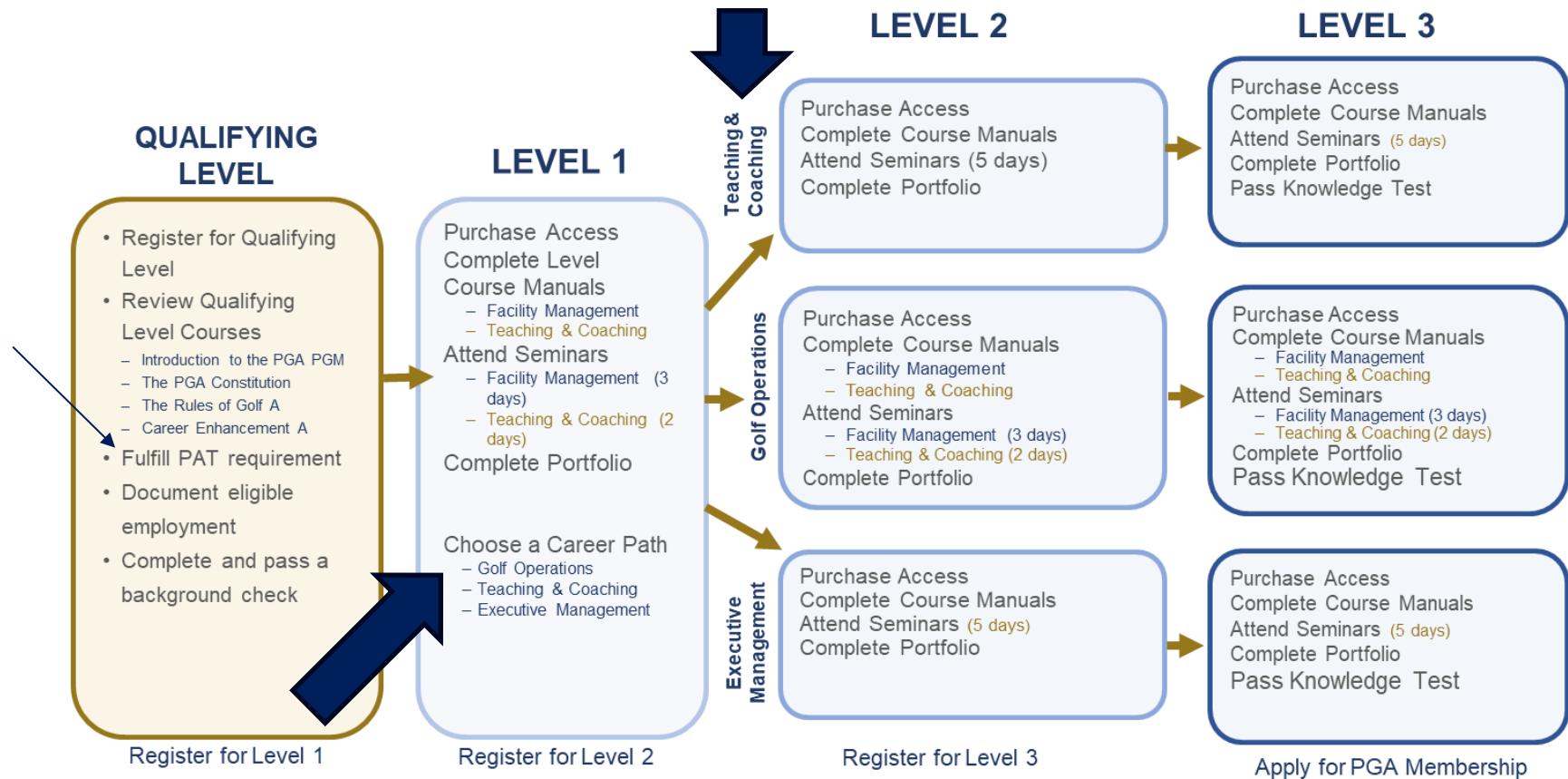
- PGA.org
- Background check
- Qualifying level
- Associated Costs
- Eligible to complete level 1 requirements
- Must meet PGA Associate requirements to advance to level 2**
  - PAT
  - Eligible Employment



# Eligible for PGA PGM

- Complete 3.1 Qualifying level requirements
- Submit Digital application found on PGA.org for PGA PGA 3.1 Program – PGA Dues and Level 1 Fees apply
- “When does the PGA Member able to access the Level 1 Courses?”**
- Once the invoices for your PGA DUES and 3.1 level 1 access fees are finalized, access is provided for 3.1 level 1 course materials on the PGA Associate's PGA portal dashboard.
- Please contact the PGA Membership Department with specific questions regarding eligibility requirements
  - 800-474-2776
  - [membership@pgahq.com](mailto:membership@pgahq.com)

# PGM 3.1 Overview



## PGM 3.1 Associated Costs – on PGA.org

# “When do I pay for each piece?”

**Qualifying Level**

Portal Access to Online Courses ..... \$200  
Valid for 9 months – if the Qualifying Test is not passed within 9 months of the purchase date, a renewal fee of \$200 will be required.

**Associate Fees**

Playing Ability Test Entry Fee ..... \$100/attempt  
Plus, additional fees required by the Section/Facility  
Association Dues and Fees ..... Refer to Fees Calculator on PGA.org  
Background Check Fee ..... \$60

**Level 1**

Program Registration Fee ..... \$200  
Portal Access to Online Level 1 Courses ..... \$560  
Seminar Session ..... \$750

**Level 2**

Portal Access to Online Level 2 Courses ..... \$350  
Seminar Session ..... \$750

**Level 3**

Portal Access to Online Level 3 Courses ..... \$350  
Seminar Session ..... \$750  
Level 3 Associate Final Exam ..... \$21\*

**Other Fees**

Seminar Transfer or Cancellation Fee ..... \$300

**Total Expected Costs**

Associate 3.1 Program ..... \$4091  
(Average time to Membership is approximately 4 years.)

Note: Retakes for PAT and Associate Exams are additional. PGA Dues, travel fees and lodging not included. Associate responsible for all travel costs.

\*Test fees are paid directly to Examity (the PGA's testing provider) and are based on current test site rates. Fees are subject to change.



# PGM ASSOCIATE PROGRAM BREAKDOWN

- Prerequisites for PGM 3.1 Associate Program:**
  - High School diploma or equivalent
  - 3.1 Qualifying level
  - PAT qualifying score or Full PAT Pass
  - Eligible Employment
- Level 1:**
  - Complete review of all L1 course manuals, preseminar assignments and pass all quizzes
  - Attend Virtual Level 1 seminar (M-F 8-5 pm)
  - Complete and submit L1Work Experience Portfolio – 21 total activities and all must all be approved
- Level 2:**
  - Select Career Path and Purchase level 2 Career Path Specific Course Manuals
  - Complete review of all L2 course manuals, preseminar assignments and pass all quizzes
  - Attend In-Person Level 2 seminar in Frisco, TX
    - (M-F 8-5 pm)
  - Complete and submit L2Work Experience Portfolio – Executive Management
    - 17 total activities and all must all be approved

- Level 3:**
  - Purchase level 3 Career Path Specific Course Manuals
  - Complete review of all L3 course manuals, preseminar assignments and pass all quizzes
  - Attend In-Person Level 3 seminar in Frisco, TX
    - (M-F 8-5 pm)
  - Complete and submit L3Work Experience Portfolio – Executive Management
    - 10 total activities and all must all be approved
- Requirements for Election to PGA Membership:**
  - Complete PGA PGM Program requirements
  - Earn 28 work experience credits
  - Eligible Employment
  - Submit Digital PGA Membership Application
- Visit [PGA.org](http://PGA.org) for comprehensive information**
- Contact the PGA Membership Department with specific questions regarding eligibility requirements**
  - 800-474-2776
  - [membership@pgahq.com](mailto:membership@pgahq.com)





# **PGA PGM 3.1 ASSOCIATE MENTORING GUIDE**

## **LEVEL 1 WORK EXPERIENCE PORTFOLIO**

### **ALL CAREER PATHS**

# PGA Associate L1 Portfolio Activity Checklist:

## Facility Management Activities:

- BP1: Define the Business
- BP2: Assess the Current State of Business
- BP3: Develop Annual Objectives & Strategies Y6
- BP4a: Assumptions for Financial Forecast and 12-month budget
- BP4b: Annual Financial Forecast Year 6
- BP4c: 12-month Budget Year 6
- BP5: Monitoring Actual Performance

Date:

## All other FM activities use the facility of employment

- CR1: Moments of Truth – own facility
- CR2: Interaction Strategies & Interpersonal Skills
- GCF1: Analyze Fleet Policies/Procedures & Financials
- Rules 1: USGA Rules of Golf Scenario & video
- TOPS1: Plan, Prepare and Run a Tournament
- TOPS2: Review and Evaluate a Tournament
- CE1: Comprehensive Career Plan
- CE1a: Current Resume
- CE1b: Current Cover Letter

## Teaching & Coaching Activities:

- TC1: Assess your own equipment
- TC2: part 1 Lesson 1 Observation (4 videos)
  - Instructor must be a PGA Member
- TC2: part 2 Lesson 2 Observation (4 videos)
  - Instructor must be a different PGA Member
- TC2: part 3 Observation Summary Questions
- TC3: Take a Lesson (4 videos)
- TC4: Conduct a lesson w/beginner student (4 videos)

## Player Engagement Activities:

- PE1: Observe a Player Engagement Program
  - Observation Video
- PE2: Design a Player Engagement Program
- Upload ADM Completion Certificate (from PGA COACH)

## Legend and Notes:

- Please see PGA.org and associate PGA Portal for complete details
- Review all level 1 course manuals for reference to complete activities
- Utilize case study facility provided with course manuals
- Activity completed in-season is most conducive
- PGA Professional assistance Needed

Date:

Date:

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# PGM L1 Business Planning Activity Descriptions

## Activity Name: BP1: Phase 1: Define the Business

### Description:

- Identify and Develop the Vision, Core Values and Mission Statement of Case Study Facility and provide description of Facility Profile with Market, Competition and Customer details
- Can be completed out of season

### Information Needed to Complete Activity:

- Review Business Planning course manual for description of step 1: "Define the Business"
- Review details of chosen case study for through and comprehensive information and development of Vision, Core Values and Mission Statement

## Activity Name: BP2: Phase 2: Assess the Current State of Business

### Description:

- Identify and review the metrics, trends, and other information regarding financial performance. Conduct a **SWOT analysis** and identify strengths, weaknesses, opportunities, and threats related to the revenue centers of the golf operation.
- Internal factors:** Evaluate the facility's core business areas that are performing well (STRENGTHS) and areas where it must improve (WEAKNESSES).
- External factors:** Consider how the market conditions, the competition, current and potential customers can positively (OPPORTUNITIES) or negatively (THREATS) that affect the business:

- Can be completed out of season

### Information Needed to Complete Activity:

- Review Business Planning course manual for description of step 2 "Assess the Current State of Business"
- Review details of chosen case study for through and comprehensive information and organization of current business using the SWOT analysis

# PGM L1 Business Planning Activity Descriptions

## Activity Name: BP3: Phase 3: Develop Annual Objectives & Strategies

### Description:

- Develop annual objectives and related strategies for the case study facility (Crescent Ridge Golf Course or Summit Valley Country Club) to align with the overall long-term goals provided
- Can be completed out of season

### Information Needed to Complete Activity:

- Review Business Planning course manual for description of phase 3: "Develop annual objectives (using S.M.A.R.T business criteria) and related strategies "
- Review details of chosen case study for thorough and comprehensive information to develop S.M.A.R.T annual objectives and strategies to achieve them

## Activity Name: BP Activities 4a, b and c - Phase 4: Financial Forecasts and Budgets and Assumptions

### Description:

- Identify a set of assumptions that take into consideration both internal and external factors that could impact the success of the business. These assumptions should state **why and by how much** you think numbers will increase or decrease in the case study facility's revised forecast.

- Can be completed out of season

### Information Needed to Complete Activity:

- Review Business Planning course manual for description of phase 4: "Develop Assumptions, Annual Financial Forecasts & 12-month budgets"
- Review details of chosen case study for thorough and comprehensive information to identify assumptions from Business Planning steps 1, 2 and 3 that will validate realistic and measurable projections for improvement in the next year (Y6) of business and distribute these projected improvements across 12 months of activity

# PGM L1 Business Planning Activity Descriptions

## Activity Name: BP Activity 5 - Phase 5: Monitoring Performance

### Description:

- Briefly describe how you will monitor performance when implementing the business plan for the case study facility. Historical information for the case studies is presented in the *Business Planning* course manual (Crescent Ridge Golf Course or Summit Valley Country Club)
- Can be completed out of season

### Information Needed to Complete Activity:

- Review Business Planning course manual for description of phase 5: "Monitoring Performance" of actual performance of objectives, strategies, Financial Forecasts & 12-month budgets"
- Review details of chosen case study for thorough and comprehensive information to identify assumptions from Business Planning steps 1, 2 3 and 4 that will validate realistic and measurable projections for improvement in the next year (Y6) of business and distribute these projected improvements across 12 months of activity



# PGM L1 Customer Relations Activity Descriptions

## Activity Name: Customer Relations: Moments of Truth at my own facility

### Description:

- Identify the Moments of Truth (MOT) that a customer experiences at your facility. Start at the entry point to the golf property and continue through the turn (end of the 9th hole) to include Moments of Truth that customers encountered during play.

### Information Needed to Complete Activity:

- Review the Customer Relations course manual to clarify "Moments of Truth"
- Understand the experience your customers have when visiting your facility and how to enhance positive MOTS and address/resolve negative MOTS

## Activity Name: CR Activity 2 – Interaction Strategies and Interpersonal Skills at My Own Facility

### Description:

- Select examples of challenging customer interactions and describe how you utilized the four Interaction Strategies and seven Interpersonal Skills based on an initial desired outcome with the customer. Remember that challenging situations may be interactions where a solution to a problem is not immediately apparent. You are required to provide one example associated with each of the four Interaction Strategies.

### Information Needed to Complete Activity:

- Visualize the experience customers have at your facility to make improvements to the operation and customer satisfaction
- Use specific terminology for interaction strategies and interpersonal skills in your descriptions as explained in the Customer Relations course manual.

# PGM L1 Golf Car Fleet Activity Descriptions

## Activity Name: Analyze Fleet Policies, Procedures and Financial Performance

### Description:

- Understand the importance of the golf car to the customer, golf professional and facility. Utilize policies and procedures necessary for the operation of a safe and efficient golf car program. Know the characteristics of a well-managed fleet, proper storage and awareness of Projecting fleet revenues and budgeting that can impact bottom line. Review Lease vs purchase options

### Time Needed from PGA Professional:

- 60-90 minutes to review procedures, reports and budgets.

### Information Needed to Complete Activity:

- Ability to review daily, weekly and periodic procedures and identify strengths and weaknesses of the fleet program as well as provide recommended improvements



# PGM L1 Rules Activity Descriptions

## Activity Name: USGA Rules of Golf & Video Tutorial

### **Description:**

- Review a common rules application at your facility. Create a tutorial video to briefly describe how members or customers can proceed in various ruling situations.

### **Information Needed to Complete Activity:**

- USGA Rules book or mobile app to define key terms, definitions and rulings used in the RULES OF GOLF and be able to locate and apply the USGA Rules to frequently encountered situations and encourage the use of the rules and standards of conduct when playing golf.
- Be sure to record the rules tutorial video in an authentic setting rather than fabricated or not in the actual rules scenario occurring on the course.



# PGM L1 Career Enhancement Activity Descriptions

## Activity Name: Comprehensive Career Plan (3 parts)

- Description:**
  - Part 1: Interview a supervising professional where you work or at a facility where 30–60-minute complete work experience activities.
  - Part 2 Refine a personal development plan identifying career interests, strengths, weaknesses and development targets
  - Can be completed out of season
- Time Needed from PGA Professional:**
  - 30–60-minute interview
- Information Needed to Complete Activity:**
  - Ask questions regarding the supervising professional's career path progression and describe positions they have had.
  - Identify what they think key knowledge, skills and experiences are needed to succeed. Discuss challenges they have had to overcome in their career.
  - What feedback did they provide regarding the development plan for your career progression as well as the plan to support you in the PGM Program.

## Activity Name: Update a current Cover Letter and Resume

- Description:**
  - Part 3: Provide an updated resume that includes your current accomplishments. Utilize power statements and other guidelines presented in the course manual. Upload the cover letter and resume to submit your assignment
- Information Needed to Complete Activity:**
  - The Career Enhancement Course Manuals from level 1 and the Qualifying level for descriptions of standardized and professional formats for cover letters and resumes
  - Review the Career Services section of PGA.org
  - Utilize the local PGA Career Consultant to review these documents

# PGM L1 Tournament Operations Activity Descriptions

## Activity Name: 1: Plan , Prepare and Run a Tournament

### Event

- Description:**
- Time Needed from PGA Professional:**
  - 60-90 Minutes to review Tournament Operations and planning a significant event at the facility
- Information Needed to Complete Activity:**
  - The documents and procedures should represent typical forms, checklists, and procedures used for planning and running events.
  - Utilize the Tournament Operations Appendix as a guide for example procedures and forms. As the Tournament is planned and executed, take photographs and/or acquire copies of key documents and checklists to support the activity answers. The selected event is likely to require the use of many of the examples listed in the Tournament Operations Required documentation form provided in the activity directions and Tournament Operations appendix

## Activity Name: 2: Review and Evaluate the Tournament from Activity 1

### Event

- Description:**
  - Conduct a review and analysis of the tournament from Activity 1 – focusing on customer satisfaction and financial performance and variances to the initial tournament budget
- Time Needed from PGA Professional:**
  - 30-60 minutes to review tournament results including customer feedback and financials
- Information Needed to Complete Activity:**
  - Review tournaments and provide suggestions to planning, preparing, staffing and conducting for improvements to future events



# PGM L1 Teaching & Coaching Activity Descriptions

## TC Activity 1: Assess Your Own Equipment

### Description:

- In this exercise, you will assess your own equipment for static and dynamic measurements.

### Information Needed to Complete Activity:

- Measure all ten static club performance specification numbers and
- Determine each club's playability dynamically
- Measure the carry distance to help you in your gap analysis
- Identify possible performance gaps that exist in static measurement or dynamic performance
- Make recommendations for appropriate golf club adjustments to improve performance



# PGM L1 Teaching & Coaching Activity Descriptions

## TC Activity 2-1 and 2-2: Observe Two Different Full Swing Lessons Conducted by PGA Member Professionals

### Description:

- In this exercise, observe two different PGA Member Professionals as they each conduct a full swing lesson (each with a different student) of 50-60 minutes.
- Before the lesson observation, the PGA Associate and the PGA Member Professional conducting the lesson should review the lesson worksheet
- During the lesson, make sure the required videos and photographs are being captured.
- Utilize the worksheet and start to document specific information - what was observed and what was or was not adjusted throughout the lesson. This includes specific elements from the opening interview through the conclusion of the lesson.
- After the lesson, utilize the videos and photographs from the lesson, and work with the PGA Member Professional who provided the lesson to review and complete this worksheet thoroughly and accurately.

### Time Needed from PGA Professional:

- 60-120 minutes for worksheet review and delivery of full swing lesson

### Information Needed to Complete Activity:

- Capture and document the lessons using videos and photographs.
- The pre-lesson videos will include one swing from the down the line perspective and one swing from the face-on perspective. The post-lesson videos will be the same (down the line and face-on) for a total of four videos for each observed lesson.
- The photographs should feature both the teacher and the player in the learning environment.
- Be sure to utilize specific terminology as described in the course manual in your observation. For example: GRIP: overlapping, open-faced, creating an open club face position at impact
- The course manual states that only one to three topics should be discussed in any one lesson. However, if the PGA Member Professional conducting the lesson worked on more than three topics, all adjustments made should be documented.

# PGM L1 Teaching & Coaching Activity Descriptions

## TC Activity 2-3: Lesson Observation Summary Questions

### **Description:**

- Use the Activity 2, Part 3 worksheet to summarize the two different full swing lesson observations.

### **Information Needed to Complete Activity:**

- The PGA Associate needs to summarize the following:**
- How have these two observations changed your ability to structure an effective lesson?
- How have these two observations influenced your ability to diagnose and improve a student's desired ball flight?
- Compare and contrast the observations you made throughout this activity between the two different lessons.
- Compare and contrast the communication styles between the two observations. What was most effective, and what was least effective?
- How has this helped your own methodology for delivering an effective golf lesson?



# PGM L1 Teaching & Coaching Activity Descriptions

## TC Activity 3: Take a Full Swing Lesson with a PGA Member Professional

### Description:

- In this exercise, you will take a full swing lesson of 50-60 minutes from a PGA Member Professional.

### Time Needed from PGA Professional:

- 60-120 minutes to review lesson worksheet and conduct full swing lesson

### Information Needed to Complete Activity:

- Before the lesson being taken, the PGA Associate and the PGA Member Professional conducting the lesson need to review the lesson worksheet.
- During the lesson, capture the required videos and photographs.
- Utilize the worksheet and start to document specific information - what was observed and what was or was not adjusted throughout the lesson.
  - This includes specific elements from the opening interview through the conclusion of the lesson.
- After the lesson, utilize the videos and photographs from the lesson, and work with the PGA Member Professional who provided the lesson to review and complete this worksheet thoroughly and accurately.
- The pre-lesson videos will include one swing from the down the line perspective and one swing from the face-on perspective.
- The post-lesson videos will be the same (down the line and face-on) for a total of four videos for the lesson.
- The photographs should feature both the teacher and the player in the learning environment.

# PGM L1 Teaching & Coaching Activity Descriptions

## TC Activity 4: Conduct a Full Swing Lesson with a Beginning Skill Level Student

- Description:**
  - In this exercise, you will give a full swing lesson of 50-60 minutes to a student who must be of beginner skill level.
  - Beginner skill level is defined as somebody who likely doesn't keep score, but if a score is kept, it is probably 60 or higher for 9 holes.
  - There is no age restriction of the student or their relationship to you.
- Information Needed to Complete Activity:**
  - Before the lesson review the lesson worksheet to clarify the requirements of opening interview, student objectives, ball flight laws, principles, practice assignments and summary questions.
  - Utilize the worksheet and start to document specific information - *what was observed and what was or was not adjusted throughout the lesson.*
    - This includes specific elements from the opening interview through the conclusion of the lesson
  - During the lesson, capture the required videos and photographs.
  - After the lesson, utilize the videos and photographs from the lesson to review and complete the worksheet thoroughly and accurately.
  - The pre-lesson videos will include one swing from the down the line perspective and one swing from the face-on perspective.
  - The post-lesson videos will be the same (down the line and face-on) for a total of four videos for the lesson.
  - The photographs should feature both the teacher and the player in the learning environment.
  - An effective opening interview collects important background information and clarifies the lesson priorities.
    - The length of the opening interview can vary but should result in more narrowly defining the objectives for the lesson with the student.
  - Be sure to utilize specific terminology as described in the course manual in your observation.
    - For example: GRIP: overlapping, open-faced, creating an open club face position at impact
  - The course manual states that only one to three topics should be discussed in any one lesson. However, if more than three topics were addressed and adjusted, all adjustments that were made should be documented

# PGM L1 Player Engagement Activity Descriptions

## Activity 1: Observe a Player Engagement Program

### Description:

- The PGA Associate observes a player engagement program at a golf facility and answer the following questions about the program. Allow for time to meet with the Professional that is leading the program to complete this activity

### Time Needed from PGA Professional:

- 6-120 minutes including the session being delivered and review of the activity worksheet

### Information Needed to Complete Activity:

- Briefly describe the facility business objective(s) being addressed by implementing the specific player engagement program. For example, is the facility focused on increasing rounds, higher total revenues, more new players, or increasing rounds from existing players? Each of these would represent facility business objectives (although they should be stated in SMART terminology).
- Describe the skill level and experience of the corresponding customer segment that is the focus of the facility's player engagement program.
- Which growth initiative from the one below most aligns with the program's customer segment?

- Create New Golfers
- Retain Beginning Golfers
- Convert an Occasional Golfer
- Open the Season

- How does focusing on this growth initiative support the facility's business objectives?
- Describe the session being observed. Identify orientation and instructional objectives, the amount of instructional time, and specific activities that students will complete in this session, and formal practices and play opportunities
- Include video with audio of the most effective teaching activities from the session (at least 2 minutes). This video may include:
- Instructional presentation from the professional being observed
  - Participants engaging in session activities
  - Your own analysis of events in the session as you are observing the session
  - Set up of actual session activities with a description

### Notes:

- Video MUST be recorded in the actual session environment, not an office setting.
- Voice-over is permitted, but not required.
- Obtain appropriate participant (or parent) permission before filming.

# PGM L1 Player Engagement Activity Descriptions

## Activity 2: Design a Player Engagement Program

### Description and Information Needed to Complete Activity:

#### PART 1: IDENTIFY AND DESIGN A PROGRAM TO MEET FACILITY BUSINESS OBJECTIVES

- Identify how the player engagement program you have selected connects to key facility business objective(s). An example could be to increase play, membership, or revenue.
- In addition, you will describe the target audience for the program and present the basic program design in terms of objectives and activities.
- Two options include designing a customized program or selecting an existing program.

#### PART 2: PROMOTE THE PROGRAM TO SPECIFIC TARGET AUDIENCES OR CUSTOMER GROUPS

- Describe how you would promote the program to the specific target audiences. To complete this section, you must describe digital promotions and/or other methods such as person-to-person outreach, group presentations, brochures, etc.
- Your promotional material should include contact information, dates of your program, and a call to action.

#### PART 3: ANTICIPATE FINANCIAL RETURNS TO THE FACILITY

- Estimate the financial success of the program. Fill out the worksheet below to estimate the net proceeds from running the program, as well as the projected future income from the program participants. The forecast should be based on the number of students who will continue to play golf and the types of golf-related activities they intend to pursue.

#### PART 4: ANALYZE AND EXPLAIN WHAT THE VALUE PROPOSITION AND VALUE EXCHANGE ARE TO THE CLUB AND YOURSELF

- Describe the value that running this type of program would offer you? (ex: learning, loyalty, career opportunities, compensation)
- Describe how this program offers value to the facility? (ex: top line growth, bottom line growth)
- Describe how this type of program adds value to the intended audience?
- Describe how you will communicate your value to your employer?





# **PGA PGM 3.1 ASSOCIATE MENTORING GUIDE EXECUTIVE MANAGEMENT CAREER PATH LEVEL 2 WORK EXPERIENCE PORTFOLIO**

# PGA Associate Level 2 Executive Management Portfolio Activity Checklist:

## Level 2 Executive Management Activities:

- EM2 Activity 1: Leadership Traits and Follower Qualities \_\_\_\_\_
- EM2 Activity 2: Applying AOR \_\_\_\_\_
- EM2 Activity 3: Understanding Federal Labor Laws and Characteristics of a Private Club \_\_\_\_\_
- EM2 Activity 4: Retail Buying Plan and MAP \_\_\_\_\_
- EM2 Activity 5: Food & Beverage Controls \_\_\_\_\_
- EM2 Activity 6: Staffing Payroll Model \_\_\_\_\_
  - (use case study business plan from level 1 portfolio)
- EM2 Activity 7: Monitor Enterprise Performance \_\_\_\_\_
- EM2 Activity 8: Analyze Enterprise Financials \_\_\_\_\_
- EM2 Activity 9: Facility Organization Chart \_\_\_\_\_
- EM2 Activity 10: Organization and Communication \_\_\_\_\_
- EM2 Activity 11: Create a Policy and Procedure \_\_\_\_\_
- EM2 Activity 12: Planning and Implementing Meetings \_\_\_\_\_
- EM2 Activity 13: Turfgrass Management – Interview the Superintendent, Sustainability, Functional Design \_\_\_\_\_
- EM2 Activity 14: Supervising & Delegating \_\_\_\_\_
- EM2 Activity 15: Delegate a Motivating Assignment \_\_\_\_\_
- EM2 Activity 16: Staff Training Program \_\_\_\_\_
- EM2 Activity 17: Marketing & Consumer Behavior \_\_\_\_\_

Date:

## Legend and Notes:

- Please see PGA.org and PGA Associate PGA Portal for complete details
- Review all level 2 course manuals for reference to complete activities
- Utilize case study facility provided with course manuals



# PGM L2 Executive Management Activity Descriptions

## Activity 1: Leadership Traits and Follower Qualities

- Description and Information Needed to Complete Activity:**
  - PART 1:** DECISION-MAKING: END-BASED THINKING, RULE-BASED THINKING, CARE-BASED THINKING
  - PART 2:** LEADERSHIP TYPES, BEHAVIORS AND STYLES
  - PART 3:** FIVE FORMS OF POWER
  - PART 4:** FOLLOWER QUALITIES

## Activity 2: Applying A.O.R.

- Description and Information Needed to Complete Activity:**
  - Action
  - Observation
  - Reflection
- Identify a procedure you would like to implement. This may be a new procedure, such as adding a new point-of-sales system in the golf shop, or an old procedure that has not been followed correctly or was discontinued for some reason. Explain why this procedure needs implementation.
- How will this new procedure affect both internal customers (employees) and external customers? Explain the expected positive effects and possible consequences.
- How will you clearly communicate the benefits of a change and its impact to not just the organization but also all employees? What will be done to empower employees and customers?

# PGM L2 Executive Management Activity Descriptions

## Activity 3: Understanding Federal Labor Laws and Characteristics of a Private Club

### Description and Information Needed to Complete Activity:

- Part 1:** Answer the following questions regarding Federal Wage and Hour Laws. Refer to the Leadership and Human Resources course manual to complete this activity
- Part 2:** Review the facility's tax status and administration policies and procedures in place at your own facility. Refer to the Strategic Business Planning course manual to complete this activity



# PGM L2 Executive Management Activity Descriptions

## Activity 4: Retail Buying Plan and Merch Assortment Plan Financial History and OTB Projections for the Merchandise Business

### Description and Information Needed to Complete Activity:

- Research the sales history, consider current trends, and develop a plan and outline procedures for inventory management as well as selling strategies for ONE (1) of the following classifications at your facility:

- Headwear
- Golf balls
- Golf clubs

#### PART 1: DEFINE THE OVERALL MERCHANDISE OPERATION

- Identify the Facility Type and Number of holes, the Market, Customer and Competition for the Merchandise Business
- Identify Prior Year Annual Total Merchandise Sales and COGS, merchandise classifications, high and low performing classifications
- Provide the facility Mission Statement and Customer Preferences

#### PART 2: PRIOR YEAR PERFORMANCE BY MONTH – CHOSEN CLASSIFICATION

- Research and document prior performance data for the chosen classification (headwear, golf balls or golf clubs) in the merchandising operation. If access to the financials is unavailable, interview the person responsible for the merchandise operation to obtain reasonable estimates of prior performance.
- At a minimum, the sales data for your chosen classification (headwear, golf balls or golf clubs) from the year prior to your plan must be provided.

#### PART 3: OPEN TO BUY PLAN

- Based on your research of past performance provided above, develop an OTB plan for the upcoming year. The spreadsheet for this activity can be found in the Education Portal. The OTB plan will be based on forecasted values for gross sales, COGS, turn rate, Beginning of Month Inventory (BOMI), and End of Month Inventory (EOMI).

#### PART 4: MERCHANDISE ASSORTMENT PLAN

#### PART 5: PRICING

# PGM L2 Executive Management Activity Descriptions

## Activity 5: Food & Beverage Controls

### Description and Information Needed to Complete Activity:

- PART 1: DEVELOP A LABOR PRO FORMA AT YOUR FACILITY**
  - For this activity, you will complete a labor pro forma, or labor budget projection, for the food and beverage operation. To get an accurate idea, select full service à la carte, formal fine dining, or other similar service that would normally utilize several service and kitchen staff.
  - Meet with your food and beverage manager to review the past three (3) months' labor budgets or other information summarizing staffing schedules and payroll costs for the service you have selected. Be sure to discuss any situations (holidays, special events, etc.) that may affect next month's staffing needs. Also, ask the food and beverage manager for a projected total income for the month for the service you have selected.
- PART 2: ESTIMATING FOOD COSTS AT YOUR OWN FACILITY**



# PGM L2 Executive Management Activity Descriptions

## Activity 6: Facility Organization Chart and Staffing Analysis

### Description and Information Needed to Complete Activity:

- PART 1: ANALYZE THE CASE STUDY FINANCIAL FORECAST**
- Describe the strengths and weaknesses of your case study golf operation organization in terms of staffing workflow and communication. (Click "tab" to expand the chart if necessary)
- Describe recommendations for the positions of the existing or additional staff needed in the case study golf operation.
- In order to implement the Case Study Business Plan The PGA Associate developed in Level 1, analyze the current organization chart for your chosen case study facility.
- Ensure the following are included to optimize the customer experience and financial performance:
- Determine recommendations for new or reassigned positions based on your assessment of your case study facility's strengths and weaknesses.

### Description and Information Needed to Complete Activity:

- PART 2: CREATE A STAFFING MODEL**
- Revise a staffing model from Year 5 Actual using the results of your analysis and identified staffing positions to project the Year 6 Labor line item at your chosen case study facility.
- Be sure the Labor Dollars allocated are realistic to cover the necessary staff identified to successfully carry out their job descriptions

# PGM L2 Executive Management Activity Descriptions

## Activity 7: Monitor Enterprise Performance

### Description and Information Needed to Complete Activity:

- PART 1: DOCUMENTING THE PROCESS TO MONITOR OPERATIONS PERFORMANCE**
- Describe your involvement in monitoring facility operations.
- What financial reports are utilized to monitor performance and how often are these reports consulted?
- Who is involved in reporting financial data from the various departments at your facility?
- Describe the facility-wide process for making recommendations and taking corrective action on performance.
- Provide recommendations to improve the procedures and systems for monitoring performance.
- Describe a previous scenario in which you were able to observe a specific area of the operation and take corrective actions that either improved revenue or expense performance.

### Description and Information Needed to Complete Activity:

- PART 2: ANALYZE FACILITY PERFORMANCE**
- Generate a set of metrics for monitoring the impact of all the core business areas in each department of your own facility.
- Prioritize the most important metrics and how often each metric should be calculated and reviewed (daily, weekly, or monthly)
- Describe the process for each department to report performance
- List members of the facility team who should be involved in the review
- Identify range of variance to budget
- Identify a potential operational, promotional or financial adjustment as a corrective action to positive or negative variance

# PGM L2 Executive Management Activity Descriptions

## Activity 8: Analyze Enterprise Financials

### Description and Information Needed to Complete Activity:

- PART 1: CREATE A FACILITY OPERATIONS SCORECARD FOR YOUR OWN FACILITY**
  - Describe the facility profile of the organization.
  - Identify key stakeholders that will receive the Facility Financial Summary (Operations Revenue Scorecard)

### Description and Information Needed to Complete Activity:

- Utilize the example Private Club "Facility Historical Data" Excel document found on the Education Portal to complete Parts 2 and 3 of this activity.
- Review the activity directions and utilize the activity worksheet to provide a comprehensive analysis of the financials.
  - PART 2: CREATE A STRATEGIC PLAN FOR AN EXAMPLE PRIVATE CLUB FACILITY**
  - PART 3: ANALYZE INCOME STATEMENTS OF THE PRIVATE CLUB FACILITY**

# PGM L2 Executive Management Activity Descriptions

## Activity 9: Facility Organization Chart

### Description and Information Needed to Complete Activity:

- Analyze the current organization chart for YOUR OWN facility. Ensure the following are included to optimize the customer experience and financial performance:
  - Facility management structure, including...
  - Part-time
  - Full-time
  - Supervisors
  - Department managers
  - Facility Leadership
  - Owners or Board of Directors
- Communication connections—i.e. who reports to whom and with whom each given position needs to communicate
- Indicate which position is responsible for different department, including...
  - Food & Beverage
  - Agronomy
  - Tournaments
  - Golf Cars
  - Teaching & Coaching and Player Development
  - Retail
- Determine recommendations for new or reassigned positions based on your assessment of your facility's strengths and weaknesses.

## Activity 10: Organization and Communication

### Description and Information Needed to Complete Activity:

- PART 1: COORDINATION AND COLLABORATION WITHIN THE FACILITY**
  - Think critically about which of the coordination tools and routines that are currently in use at the facility where you work, as well as any tools and routines not in use that could enhance coordination throughout the facility.
- PART 2: COORDINATION AND COLLABORATION WITH AGRONOMY**
  - Identify the tools and routines currently in use for coordinating operations and communicating with the golf operations department.
  - Identify the tools and routines currently in use for communicating with customers or members.
  - Evaluate the success of these coordination efforts and recommend specific improvements in the table below
- PART 3: MASTER CALENDAR**

Upload a copy of your facility's Master Calendar that details events involving the departments listed below. If your facility does not have a master calendar, you will need to create one. Upload your example to the box below.

  - Administration and Finance
  - Golf Operations
  - Retail
  - Agronomy
  - Food & Beverage
  - Amenities

# PGM L2 Executive Management Activity Descriptions

## Activity 11: Create a Policy and Procedure

### Description and Information Needed to Complete Activity:

- Describe the strengths and weaknesses of your facility operation.
- Develop a policy and procedure to correct two (2) facility operation weaknesses described above.
- Include proper use of RESOURCES, STAFFING, and SYSTEMS.
- Part 1:** Identify the steps to purchase and manage inventory (food & beverage, golf operations supplies, retail, agronomy, aquatics, locker room, etc). Include communication with vendors, purchase order procedures, and receipt of product.
- Part 2:** Identify the steps to enhance facility product knowledge and improve staff selling skills (Golf Operations, Food & Beverage, Membership, or other revenue department).
- Include how training materials will be sourced and communication methods that will be used with the team



# PGM L2 Executive Management Activity Descriptions

## Activity 12: Planning and Implementing Meetings

### Description and Information Needed to Complete Activity:

#### PART 1: PLANNING AND IMPLEMENTATION

- What is the meeting purpose?
- Identify the meeting attendees and explain why each person's presence is important to the meeting.
- What is the scheduling approach? What methods are being used to ensure that all attendees are available and formally invited?
- What meeting space will be used? How does it fulfill the requirements for the meeting?
- List agenda items below. Explain why these items were put on the agenda.
- What is the anticipated length of the meeting?
- Identify what materials are needed for the meeting and what tasks have been assigned to attendees in preparation for the meeting.
- Based on the variety of attendees, what questions, concerns, or challenges are anticipated?

#### PART 2: POST MEETING ANALYSIS

- Explain how the meeting achieved its intended purpose.
- What was the length of meeting (planned vs. actual)? How did you keep the meeting on track and on time?
- Describe follow-up items from the meeting, including who is assigned to complete these items and their timeline for completion and how was it determined what follow-up tasks were assigned to various attendees, and how did that choice affect attendee buy-in?
- What items from the agenda were decided upon or finalized?
- Identify what components of the meeting went well and explain why these items were successful.
- What parts of the planning and implement process were not successful and how would they need to be changed?
- What unanticipated questions came about during the meeting and how were they answered or resolved?
- Describe the contributions provided by attendees and how they were incorporated into the meeting and/or the work environment.
- Select one of the attendees in the meeting that was assigned a task. Describe their performance of tasks assigned and how the attendee produced in relation to the timeline

# PGM L2 Executive Management Activity Descriptions

## Activity 13: Turfgrass Management - Interviewing the Golf Course Superintendent, Sustainability Practices, and Functional Design

### Description and Information Needed to Complete Activity:

- Conduct an interview with the superintendent to learn more about the job challenges that they face.
- PART 1: BACKGROUND INFORMATION**
  - Identify the current facility details and the professional history of the course superintendent
- PART 2: MAINTENANCE PRACTICES**
  - Discuss the routine and periodic maintenance practices and why they are necessary.
  - Include the impact of these maintenance practices on customer playability.
- PART 3: COMMUNICATION AND COORDINATION**
  - Describe the differences between the responsibilities of the various department heads
  - Describe the importance of good working relationships among these various department heads
- PART 4: SUSTAINABILITY PRACTICES**
  - Perform an assessment of the facility's environmental and sustainability practices. Learn what the facility has done and what it plans to do in relation to the environment and local communities.
- PART 5: FUNCTIONAL COURSE DESIGN**
  - In consultation with your course superintendent, identify a functional design problem that may interfere with a positive playing experience, efficient maintenance practices, proper coordination with golf operations or pace of play as an example. Discuss a solution that includes addressing risk, appropriate resources, an estimated budget and timetable for implementation.

# PGM L2 Executive Management Activity Descriptions

## Activity 14: Supervising & Delegating

### Description and Information Needed to Complete Activity:

- The purpose of this two-part activity is to practice applying the concepts and tools to an actual performance scenario at your place of employment.
- PART 1: DIAGNOSING A PERFORMANCE PROBLEM AT YOUR OWN FACILITY**
  - Choose a performance problem to address, using the following guidelines:
  - The performance problem should involve a performer over whom you have direct supervisory responsibility. This facilitates engaging the performer in problem solving.
  - The performance problem should involve a specific task rather than a performer's entire job. Choosing a specific task allows you to focus on one problem, and not the whole job.
  - Choose a problem about which you have not reached any conclusions or one where you are able to set aside any conclusions you have reached. This is especially important if the assumed conclusion points to the performer as the primary cause of the problem.

- PART 2: CONDUCTING A JOINT PROBLEM-SOLVING DISCUSSION AT YOUR OWN FACILITY**
  - As described in the course manual and seminar, joint problem solving is the first stage in a four-stage sequence for correcting performance problems. The purpose of this activity is to practice applying the action steps for joint problem solving with the performer. Ideally, you will address the same situation you diagnosed in PART 1.
  - The following four-stage sequence of events is used to correct performance problems:
    - Stage 1: Joint Problem Solving with the Performer
    - Stage 2: Reinforced Problem Solving with the Performer
    - Stage 3: Final Decision Making with the Performer
    - Stage 4: Termination of the Employment Relationship
  - The manager should move through each stage systematically—that is, the first action of reinforced problem solving with the performer should only begin if the steps in the joint problem-solving stage have not been successful. Ideally, most performance problems can be solved via stage 1: joint problem solving.

# PGM L2 Executive Management Activity Descriptions

## Activity 15: Delegate a Motivating Assignment

### Description and Information Needed to Complete Activity:

- The purpose of this two-part activity is to practice applying the principles of motivating work to a specific work assignment. Focusing on a specific work assignment will allow you to see the impact of applying these principles
- PART 1: IDENTIFY PRINCIPLES OF MOTIVATING WORK**
- Review the Principles of Motivating Work
  - Skill Variety—The more skills the performer can use while completing a task, the more involved the performer will be.
  - Whole Task— “Whole task” means that the performer works on a complete task from beginning to end. Performers find this more interesting than being involved with fragments of a task, and feel greater ownership for the results of their work.
  - Significant Work—Performers are more inclined to dedicate themselves to tasks they believe have real significance, as opposed to ones they believe have little impact.
  - Autonomy—Performers who have a reasonable amount of freedom to determine how best to do a job are more motivated than those who have little discretion about how to do the job.
  - Feedback—Performers who receive clear, timely, and unbiased feedback about achieved results in relation to goals are more likely to strive for improvement than those who fail to receive such feedback.

### Description and Information Needed to Complete Activity:

- PART 2: APPLYING APPROPRIATE DELEGATION STRATEGIES**
  - The purpose of this activity is to practice applying an appropriate delegation strategy in making an assignment and monitoring progress.
  - Use either the assignment designed in Activity 6 or one where some resistance is expected from the employee in order to practice the use of convincing or involving as a delegation strategy.
  - Ideally, try to identify a situation where the convincing or the involving strategy can be used to complete this activity.
  - Describe a situation where you have the authority to delegate an assignment.
  - Review the Delegation Strategy Matrix shown in the Organizational Development course manual to identify which delegation strategy is most appropriate for this situation.
  - Describe your rationale.

# PGM L2 Executive Management Activity Descriptions

## Activity 16: Staff Training Program to Utilize the “6 Step Selling Process”

### Description and Information Needed to Complete Activity:

- Identify and develop a staff training program for all facility staff to utilize the “6 Step Selling Process”
- Utilize the model introduced in Level 2 to outline the components of the training program in the table that follows.
- It must describe each step in each phase of this model, originally shown in the Marketing & Promotions course manual.

The Six Step Sales Process details how professionals should sell golf to our customers.



# PGM L2 Executive Management Activity Descriptions

## Activity 17: Marketing and Consumer Behavior

### Description and Information Needed to Complete Activity:

- The purpose of this two-part activity is to apply marketing and consumer behavior concepts and approaches to an actual performance scenario at your place of employment. This activity has two parts.
- PART 1: PLANNING AND DESIGNING A MARKETING STRATEGY**
  - What product or service will be marketed to members or customers? Why does the product or service need marketing and what is the market demand for it?
  - Who is the target audience? Why? What are the characteristics of this audience that can be used for marketing purposes?
  - What relevant content must be included for the audience to know?
  - How will the message convince customers or members to purchase the product or service? How will it change their wants to needs?
  - Describe how the product or service supports and enhances the facility brand.
  - Explain how you market and promote your value as a PGA Professional to your facility and customers.
  - Describe how your facility brand will be enhanced by marketing and promoting the PGA brand and the value of PGA Professionals.
  - Describe the competition to the product or service that must be considered
  - Identify and explain the strengths, weaknesses, opportunities and threats (SWOT) of this marketing effort.
  - Based on the results of the SWOT analysis, Identify and explain what changes will be made for future marketing at the facility.

### Description and Information Needed to Complete Activity:

- PART 2: UNDERSTANDING CONSUMER BEHAVIOR: CONSUMER AND MARKETER PERSPECTIVES**
  - Utilizing the consumer behavior study framework provided in the Marketing Course manual, select one consumer perspective theory from one of the three phases and explain how an understanding of the selected theory can better help the facility market to various customers
  - Utilizing the consumer behavior study framework above, select one marketer perspective theory from one of the three phases and explain how an understanding of the selected theory can better help the facility market to the various customers.



# PGA PGM ASSOCIATE MENTORING GUIDE EXECUTIVE MANAGEMENT CAREER PATH LEVEL 3 WORK EXPERIENCE PORTFOLIO

# PGA Associate Level 3 Executive Management Portfolio Activity Checklist:

## Level 3 Executive Management Activities:

- EM3: Activity 1: Leadership Self Assessment
- EM3: Activity 2: Case Study Strategic Plan/Team Simulation
- EM3: Activity 2a: Strategic Plan Financial Upload
- EM3: Activity 2b: Team Simulation Planning Document
- EM3: Activity 3: Financial Club Operations
- EM3: Activity 4: Enterprise-Wide Daily Operations Report
- EM3: Activity 5: Food & Beverage Menu Engineering
- EM3: Activity 6: F&B Staff Training and Mitigating Risk
- EM3: Activity 7: Competitive Advantage Pricing
- EM3 Activity 8: Talent Management & Evaluation
- EM3 Activity 8a: Performance Evaluation Template
- EM3: Activity 9: Diversity and Inclusion Assessment
- EM3: Activity 10: Marketing Plan

Date:



# PGM L3 Executive Management Activity Descriptions

## Activity 1: Leadership Self-Assessment

- Description and Information Needed to Complete Activity:**
  - Part 1: Conduct a leadership self-assessment.**
    - Analyze and prioritize your strengths and weaknesses in the Core Competencies identified for the career path of Executive Management.
    - Analyze and prioritize your leadership strengths and weaknesses in Leadership and Organization Development
    - Analyze and prioritize your leadership strengths and weaknesses in Strategic Management & Marketing and Promotions.
  - Part 2: Develop a personal leadership improvement plan.**
    - Prioritize the weaknesses you have identified from your self-assessment above and develop an action plan for improvement. The action plan will need to include the following details:
      - Three (3) book (hard copy or audio version) or digital media (YouTube, podcast, webinar, vlog, TedTalk, etc.) review assignments from a Leadership or Business industry expert.
        - Media Links must be provided and must be open to public access
        - Subscription based formats are not acceptable
        - The minimum time requirement for digital media submissions is 15 minutes
      - The evaluations will ask questions concerning how the author or the industry expert has influenced your leadership and business skills and experiences.

## Activity 2, 2a, 2b: Strategic Planning – Level 3 Team Business Simulation

### **Description and Information Needed to Complete Activity:**

- Utilize the simulation reports from the Level 3 seminar team simulations to create a Strategic Plan for the next 3 years (periods 5-7). The necessary resources to complete this activity include the "Manager's Handbook", the team simulation reports and the Team Simulation Planning Document
- Part 1: Define the Business
- Part 2: Assess the Current State of the Business
- Part 3: Develop Facility-wide Strategic Goals, Objectives and Strategies
- Part 4: Department Summary – Goals, Objectives, Strategies
- Part 5: Create Enterprise-wide Financial Forecasts (years 5-7)
- Part 6: Monitor Enterprise Performance: Develop a Department Performance Measurement Plan
- Part 7: Upload the Completed Team Simulation Planning Document from the Level 3 Seminar

# PGM L3 Executive Management Activity Descriptions

## Activity 3: Tax Financial Club Operations

### Description and Information Needed to Complete Activity:

- PART 1: TIMES TO BE 501(C)(7) TAX EXEMPT AND 501(C)(7) ADVERTISING**
  - Review the tax scenarios in the activity worksheet and record each transaction. Indicate if the transaction will be always taxed, possibly taxed, or never taxed.
- PART 2: COMPENSATION STRUCTURE AND REPORTING GUIDELINES**
  - Review and identify the staffing requirements and job titles for the following departments in your facility.
    - Administration
    - Agronomy
    - Marketing
    - Memberships/Customers
    - Amenities
    - Finance
    - Merchandise
    - Player Development
    - Food & Beverage
    - Golf Operations
    - Teaching & Coaching
    - Tournament Operations

## Activity 4 and 4a: Enterprise-Wide Daily Operations Report

### Description and Information Needed to Complete Activity:

- CREATE A FACILITY DAILY OPERATIONAL SCORECARD**
  - Create a daily summary report for all departments at your facility. Be sure to include key metrics and qualitative information from the following departments:

Administration	Retention	Membership/Customer
Agronomy		Merchandise
Catering & Events		Player Development
Finance		Teaching & Coaching
Food & Beverage		Tournaments
Golf Operations		Outside Operations
Other Relevant Departments		
  - This document should be a one to two-page document that can be accessed and completed by each department and submitted for review by facility management

# PGM L3 Executive Management Activity Descriptions

## Activity 5: Food & Beverage Menu Engineering

### Description and Information Needed to Complete Activity:

**Part 1: Conduct Menu Engineering Analysis on one main food category of the main menu at the facility.**

- Identify the period (Month, Quarter, Year, etc.) and meal service (Full-service, Lunch, Dinner, etc.) utilized for analysis:
- What is the Food Cost Target for the overall Food & Beverage Operation during this menu service?
- Which Menu item in this category is performing the best?
- Which two (2) menu items in this category are performing the worst? What adjustment would you recommend to improve the performance for popularity and what adjustment for profitability of these items?
- Which Menu item in this category is performing the best?
- Which two (2) menu items in this category are performing the worst? What adjustment is recommended to improve the performance for popularity and what adjustment for profitability of these items?
- Describe why these items were selected and how their placement and priority on the menu is intended to impact customer interest and the financial performance of the food & beverage department.
- What area(s) of the menu is targeted to improve the competitive advantage for the food & beverage department and the facility?

**Part 2: Identify Suggestions for Menu Revisions**

- Describe the current food & beverage service. Include details of the current menu layout.
- Describe how menu items could be featured on a revised menu and why they were selected to be featured.
- Describe the key changes that could be made to the menu. Include details of menu items that should be removed and any that you think should be added.
- Provide rationale as to how these changes could improve competitive advantage for the facility in the marketplace.
- Describe how these changes could be communicated to existing and potential customers.

# PGM L3 Executive Management Activity Descriptions

## Activity 6: Food and Beverage Staff Training & Mitigating Risk

- Description and Information Needed to Complete Activity:**
  - Part 1:** Develop a Staff Training Program to educate and promote the facility's commitment to food health and safety
  - Part 2:** Develop a Staff Training Program to educate and promote the facility's commitment to beverage health and safety
  - Part 3:** Describe the Purchasing & Receiving and Inventory Management Procedures for the Food & Beverage Operation

## Activity 7: Competitive Advantage Pricing

- Description and Information Needed to Complete Activity:**
  - Part 1:** Assess the Pricing of Products offered by a Selection of Departments
  - Part 2:** Prioritize the Facility Pricing Assessments
  - Part 3:** Develop an Action Plan to Improve the Facility's Competitive Advantage

# PGM L3 Executive Management Activity Descriptions

## Activity 8 and 8a: Talent Management and Evaluation & Template Upload

**Description and Information Needed to Complete Activity:**

- Part 1:** Create a Cross Training Plan
- Part 2:** Create a Facility-Wide Succession Plan for the Facility
- Part 3:** Identify the Process of Managing Staffing Levels
- Part 4:** Create a Facility Team Member Performance Review Plan

## Activity 9: Diversity and Inclusion Assessment

### Description and Information Needed to Complete Activity:

- PART 1 (AWARENESS): SWOT ANALYSIS** - Conduct a SWOT Analysis at your facility for the vendors, staff and customers to take actions that can develop diversity and inclusion.
  - Vendors: To increase diversity among vendors requires an organization's leadership to recruit vendors that represent diversity-owned businesses. Assess your facility's current level of diversity as it relates to vendors utilized in various departments of the facility.
  - Staff: Assess the current level of diversity within the staff as it relates to age, gender, ethnicity, education, experience, etc.
  - Customers: Assess how diverse the current customer base is at your facility. Are there undeserved customer groups by age, gender, ethnicity, skill level, etc.?
- PART 2: CREATE A PLAN FOR DIVERSITY AND INCLUSION AT YOUR FACILITY**
  - Prioritize the results of the SWOT Analysis above regarding diversity and inclusion and utilize specific steps of the AIDA model to develop meaningful engagement with diverse staff, customers and stakeholders.
  - The focus is to promote transformative changes across departments in your facility that result in potential benefits of diversity and inclusion that can improve the work environment and establish a sense of belonging among employees, making them feel more connected and productive.
  - Research has shown that facilities that implement D&I practices see significant gains in business results, innovation and decision-making.

# PGM L3 Executive Management Activity Descriptions

## Activity 10: Marketing Plan at Your Own Facility

### Description and Information Needed to Complete Activity:

- Part 1: Define the Business (Products and Purpose)**
  - Marketing Plan Executive Summary: Briefly summarize key points of the Strategic Marketing Plan.
  - Vision: Outline a Vision statement for your facility
  - Core Values: Encompass beliefs and common practices that will help establish and communicate the culture and support the vision of your facility.
  - Facility Profile: Describe the facility, services and amenities that deliver the customer or member experience communicated by the facility brand
  - Mission Statement: Create a mission statement or revise the existing mission statement
  - Culture: Describe the facility culture and its unique attributes
  - Brand: Describe the facility brand and the Brand Promise
  - Competitive Advantage: Describe where your facility is in the marketplace as it relates to having a competitive advantage(s) (or disadvantages).
- Part 2: Assess the Current State of the Marketing Business**
  - Step 1: Summarize Recent Marketing Efforts**
    - Conduct a financial review of the recent marketing efforts within each department and include which departments are performing well with marketing efforts.
  - Step 2: SF-SWOT Analysis:**
    - SUCCESES:** Describe Facility Marketing Successes
    - FAILURES:** Describe Facility Marketing Failures
    - Conduct a SWOT Analysis: Describe and prioritize the Strengths, Weaknesses, Opportunities and Threats from the Marketing perspective of each department.
- Part 3: Develop two (2) Facility-Wide Long-Term Marketing Goals, Annual Objectives and Strategies (Product, Price, Placement, Promotion and Purpose)**
  - Develop an Enterprise-wide Facility Marketing Goal
  - Indicate the Key Departments
  - Provide an overview that supports and summarizes the goal.
  - Identify four (4) Annual Marketing Objectives
  - Describe two (2) Strategies to achieve each Annual Marketing Objective
- Part 4: Summary of Intended Outcomes (Purpose)**
  - Summarize the intended outcomes of your facility-wide marketing plan to improve your facility's competitive advantage(s) in the marketplace.



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