PROPONENT GROUP

The Proponent PunchList

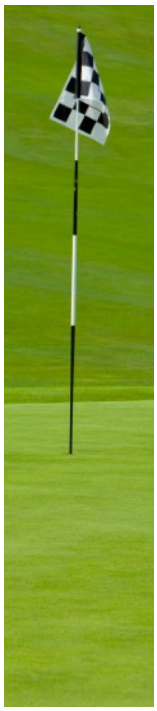
Our Exclusive Member Workbook and Scorecard is Your Essential Tool for Operating a Successful Instruction Business

Congratulations. You've established yourself as a full-time instructor and are achieving success. You've also made a forward-thinking move by availing yourself of Proponent Group's support and services. It is now more possible—and more necessary—to bring advanced management techniques to your teaching and coaching practice. But it's no small challenge to take care of your existing students and continually hone your coaching skills even as you work to grow your business and your income. The Proponent PunchList addresses all these activities, meanwhile helping you achieve a reasonable work-life balance.

If you are a new member of Proponent Group, you are best off using the PunchList initially as an assessment tool. Within it are 30-plus sub-categories of management and business strategy. In most cases a new Proponent member will find they are proficient in many of these areas, adequate in some and in need of considerable help in others.

Our goal is to see you get more from your business's current strengths while helping you address any possible weak areas so they no longer pose a threat to future success.

You don't have to tackle all of these PunchList items at once, nor should you. For each sub-category we provide a suggested time interval or cycle when review is most appropriate. We do suggest you go back over the entire list annually, and use your yearly review to re-prioritize your greatest opportunities as well as your most vital needs.



Under many of these items you will find **Assets to Assist**. These are guides, templates, video presentations and other tools stored in the member-only section of the Proponent Group website. You can readily deploy and customize these assets to help you complete a given task. What follows is the PunchList in its entirety, sequenced according to our recommendation as to how frequently the various tasks should be taken up.

Name: _____ Date: _____

Daily

- [ ] **Protect Your Business Data**

You absolutely, positively must have daily on-site backup of all your business data. You should also have off-site backup of all business files and data. Services such as Crash Plan, Carbonite and others charge $50 to $100 per year for this service, which is completely automatic once you set it up.

Weekly

- [ ] **Plan and Execute Your Social Media Postings**

Social media is inexpensive, immediate and powerful when used on a regular basis. To be effective you must post on a regular basis and your postings must be relevant to your students and potential students. Plan and create each week's content and posting schedule, either far in advance or at the beginning of the week it will go live.

Assets to Assist

Social Media for Golf Professionals and Instructors

Social Media Quick Guides

- [ ] **Update Your Database**

Your database is your main lifeline to your students and your local golf market. At least once a week you must check that all new email addresses that have been obtained have been input and segmented correctly in your master database.

Your Notes

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Monthly

Communication with Your Bosses via a Monthly Report

Prepare a monthly report to your supervisor and/or facility management to keep the lines of communication open and to keep all parties up-to-date on instruction-program activities. We suggest that incremental revenues directly attributable to the instruction program be tracked and included whenever possible.

Assets to Assist:

Instructor Economic Impact Calculator

Instructor Economic Impact Study Results

The Business Value of Golf Instruction Report

Quarterly

Update Your Marketing Calendar

Every three months, you should plan out the ensuing three months of programs, offers and special events. Create a communications plan for each one, including dates for sending out marketing emails, posting physical signage or putting up social media posts. Typically your first announcement for any special event or new program should come six weeks before it begins.

Train Your Staff (if applicable)

Provide regularly scheduled teacher training sessions (at least quarterly) for all staff instructors. These sessions should include service reviews that are designed to hold everyone on staff accountable for providing each and every student and guest with outstanding service, as well as prompt follow-up to all inbound communications.

Your Notes

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Every Six Months

Your Notes

Protect Your Identity

Identity theft is very common and continues to grow as a threat to your financial health. At least once every six months, change all passwords associated with websites you use for your business and personal finances. Proponent Group also recommends signing up for a service such as LifeLock that actively monitors your bank and credit accounts 24/7 and alerts you if any new accounts are opened using your identity.

Scrub Your Complete Database

Your database of clients and potential clients is one of the most valuable assets your business owns. At least twice annually you should clean the database, including deleting duplicate email addresses and dropping non-responsive email addresses.

Review Your Social Media Effectiveness

Social media changes at lightning speed. Every six months review how you are using social media and review each platform you use for its effectiveness in reaching potential students. If you find one platform is outperforming double down with more posts to that platform. For an under-performer, pull the plug and try something new.

Assets to Assist:

How to Grow Your Business Using Social Media (Peter Hart and Ricky Potts) - Video Archive

Social Media: The Latest Tricks of the Trade (Susie Lokey) - Video Archive

Marketing Workshop: How to Drive Business with Social Media - Video Archive

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Every Six Months (cont'd)

- [ ] **Plan for Public Relations Opportunities**

Every six months or so, review upcoming special events, anniversaries, student or business milestones or other newsworthy events that your local media may want to report on and that should absolutely be posted to your social media.

Assets to Assist:

Instructor Public Relations Guide

Inexpensive Public Relations and Brand Building (Karen Moraghan) - Video Archive

Annually

- [ ] **Review Your General Business Strategies**

Each year when you're out of your peak season, take time to review your teaching business's strengths, weaknesses, opportunities and threats. From this review, lay out a prioritized plan for leveraging the positives and mitigating the negatives. Think about your key differentiators: Did you strengthen your position in your local market this past year? Alternatively, did your competition raise their games? This is the time to set some realistic growth goals for your revenues and meanwhile review all your expenses to see if any trimming is appropriate.

Assets to Assist:

How to Protect Your Business in a Changing Market (Lorin Anderson) - Video Archive

Your Notes

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Annually (cont'd)

Convene Your Business Advisory Board

Assemble an advisory board of two to four executives or professionals whom you trust and who know your business well. You will be asking them to review your general business practices at least once a year. These will be men and women with a wide array of business experience including management, marketing and accounting. Your board should assist in setting measurable business metrics and goals for your business to strive to attain.

Assets to Assist:

Why You Need an Advisory Board (Dom DiJulia) - Video Archive

Review All of Your Instruction Programming

Once a year you should review every instruction program you offered in the year just completed and determine if it met your goals for participation and profitability. If a program proved lacking, determine how to make it more successful in the coming year, or else drop the program and replace it with something new. Many of our members drop one or two programs that are laggards each year and replace them with new programs to keep things fresh.

Check on Your Personal Health

Schedule an annual physical including skin cancer screening. You are the product your business is selling, and you must be healthy in order for the business to operate. Also, schedule a traditional vacation of at least one full week every year, to recharge physically and mentally.

Assets to Assist:

Managing Work/Life Balance of a Golf Professional (Dr. Rick Jensen) - Video Archive

Your Notes

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Annually (cont'd)

Continue Your Education

Set aside resources and time to make sure you are fully informed on new trends in the golf instruction industry. Schedule your attendance at key summits and certification programs that are relevant to your instruction programs and specialties. Typically Proponent Group members spend an average of slightly more than $2,000, out of pocket annually, on their professional education.

Assets to Assist:

Certifications Guide on Members' Website

Upgrade Your Teaching Technologies

Review your current teaching technologies and properly budget for and/or purchase those that best complement your teaching style. Set aside ample time to review new technologies as they become available.

Update All Online Business Information

Once a year – say around New Years – check all local business listings websites you are on to make sure all of your business information is up to date. Check that your business profile is also up to date on: LinkedIn, YouTube Channel, Twitter, Facebook, Instagram and any other social-media sites where you have an account.

Your Notes

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Annually (cont'd)

Your Notes

Review Your Contract

Do you have a written Letter of Agreement or a formal written contract that is in force at this time? If not, we highly recommend putting your basic agreement in writing. Many Proponent Group members have regretted not having their agreement in writing when their facility was sold or new management came in.

Assets to Assist:

Golf Instructor's Guide to Employment Contracts

Action Plan & Director of Instruction Job Description

Independent Contractor Contract Template

Review Your Website's Design

Is your site fully functional for consumers? Is your site responsive for mobile devices? Is your site working hard for your business? Can you purchase products and services directly on the site? Is it time for a completely redesigned website (which should be done every five years)?

Assets to Assist:

Golf Club and Instructor Websites 101

Communicate with Your Bosses: Create an Annual Report

At the end of your season or year, it is important to provide to management or ownership a summary report of your successes from the previous year and plans for the upcoming year.

Assets to Assist:

Annual Report Template

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Annually (cont'd)

Your Notes

Plan for Your Taxes

Golf instructors can have fairly complex tax returns due to independent-contractor status, incorporation issues and a variety of small business deductions you may be eligible to receive. Meet with your tax professional annually to review any changes in your business that may affect your tax situation.

Assets to Assist:

Golf Instructor's Tax Return Guide

Manage Your Current Endorsement Contracts

Communicate on at least an annual basis with all companies you have an endorsement deal with. Send photos showing you using the product. Send a thank-you to your management contact at the company and offer to assist in any area where you may be helpful. If you have no current contracts, spend a little time strategizing possible affiliations that may be mutually beneficial.

Assets to Assist:

Panel Discussion: How to Get a Staff Contract - Video Archive

Purge Files

Shred invoices older than 4 years and tax-related documents older than 7 years. NOTE: Always keep a file copy of all business and personal tax returns—forever.

Conduct Employee Reviews (if applicable)

At the end of your busy season or at the end of the calendar year, it is recommended that you review each employee's performance. As part of this process, create a plan for continued growth

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Annually (cont'd)

- [ ] **Update Operations Manuals (if applicable)**

Make sure this information is easy to locate, current and has been provided to all concerned parties.

Assets to Assist:

Policies and Procedures Template

Every Two Years

- [ ] **Review All Instruction-Program Pricing**

At least once every other year, you should review all the pricing of your instruction programs and adjust up or down based on demand.

Assets to Assist:

Golf Instructor's Guide to Pricing Services

- [ ] **Update Your Photography**

Out-of-date or poor photography on your website, emails and other business collateral takes away from your professional image. At least once every two years, hire a professional photographer to shoot fresh photos for your business.

Assets to Assist:

Instruction Marketing Guide

Your Notes

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Every Two Years (cont'd)

Update Your Biography

Assets to Assist:

Golf Instructor's Guide to Writing a Professional Biography

Update Your Liability Insurance

Every two years, have an insurance agent perform a Liability Insurance review, especially if your business has been growing.

Assets to Assist:

Proponent Preferred Insurance Consultant, Byron Shultz

Update Your Business Property Insurance

We recommend that every two years you have an insurance agent do a Business Property Insurance review, especially if your business has been growing.

Assets to Assist:

Proponent Preferred Insurance Consultant, Byron Shultz

Improve Your Networking and Visibility

Opportunities typically come your way only if you are highly visible to your peers. Ask yourself if you've been visible and look for opportunities to share your knowledge and help the industry. Most of the teachers whom you see earning awards have been very visible. Have you attended at least one teaching summit in the past year? Have you volunteered to be on a section committee? Have you volunteered to speak at a teaching seminar? All of these opportunities are good places to start.

Your Notes

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Every Two Years (cont'd)

Review Your Credit Card Processing Fees (if applicable)

At least once every two years, you should review your credit card processing fees. There have been many new processing products coming to market of late, that you may not be aware of. Check to see if they might benefit your teaching business and potentially save you money.

Assets to Assist:

Credit Card Authorization Letter Templates

Proponent Preferred Credit Card Processing Consultant Tim Condon

Every Five Years

Review Your Disability and Life Insurance

We recommend that every two to five years you have an insurance agent do a Disability and Life Insurance review, especially if your net worth has grown substantially since your last review.

Assets to Assist:

Proponent Preferred Insurance Consultant, Byron Shultz

Review Your Estate Planning and Will

Proponent Group members often accumulate significant assets that need to be properly protected for your legacy. At least once every five years you should review your current estate plan.

Your Notes

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Every Five Years (cont'd)

Your Notes

☐ **Update Your Company Logo**

Most brands update their logos every 5 to 7 years. Is yours due for a freshening?

Assets to Assist:

Instructor Logo Design Guide

"It is not the strongest of the species that survive, nor the most intelligent, but the one most responsive to change."

- Charles Darwin, scientist (1809-1882)

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