

Lead Generation Playbook

(How to implement, pitch, and advertise)



CAPSTONE
HOSPITALITY
Membership Sales + Staffing

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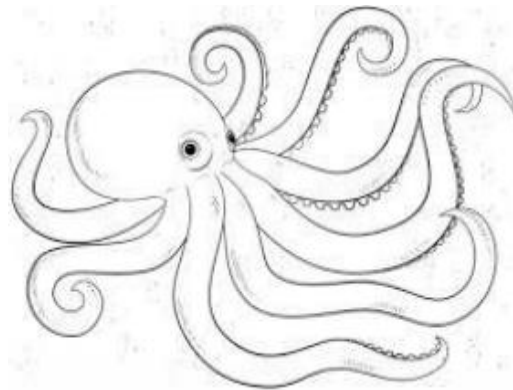
Example of Lead Generation Calendar

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Introduction

Lead Generation Programs are the cornerstone of the Capstone Hospitality approach and sales process. Implementing multiple programs to drive leads to your club is vital for your club's success. The most successful Capstone sales people are those who implement the most successful programs.

Think of your Lead Generation Programs as an octopus. The body of the octopus is your club. The tentacles are your programs and each tentacle/program will bring you leads each month. The more tentacles/programs you have out in the community, the more leads you will have, therefore making more sales. Your job is to set up lead generation programs that are regularly bringing you leads.



Our Lead Generation mentality focuses on building relationships in the community. By identifying and tapping into quality markets in your community, you can utilize relationships to drive leads to your club. Capstone utilizes **grassroots, relational, and cost-effective methods** of generating leads. Think creatively and strategically about how to implement programs at your club. If you are being placed at a club in your hometown, it is very likely that you have an **existing network** of friends, family, business connections, etc... These connections will be your most powerful source of leads and connections to the surrounding community! **Reach out** to them and let them know about your new position and what you are trying to accomplish.

This Lead Generator Playbook has been tested across many years and many markets. Some programs will be more successful in certain markets than others, but you should implement every program to learn which work best and which can be reformatted for your area.

Important note for ALL Lead Generation Programs, marketing and advertising

All programs and marketing materials must be approved by Capstone management before being shown to club staff, potential clients, or current members.

Lead Generator: New Home Letters/Targeted Letters

Objective: Send personalized letters to new home owners and/or home owners near the club to inform and invite them out to the club.

Steps:

- 1) **Identify** a target audience in the area that you want to connect with. The homes should be in price ranges & locations that are match your clubs membership demographic.
- 2) Collect a list of names and home addresses
 - a. You can collect this list by contacting your townhall and requesting a list of homes with specific parameters. You can also utilize websites such as Zillow.com & Realtor.com
- 3) Using the Capstone Hospitality letter template, draft a letter to distribute.
- 4) **Send** your draft to Capstone Management
 - a. Make sure you letter **has a hook!**
- 5) After any changes, present the letter to your General Manager
- 6) Using the clubs printer, print out the amount of letters you'll send.
- 7) You will tri-fold these letters and place them in envelopes.
- 8) Using your advertising budget, purchase stamps
- 9) **Hand sign** each letter and the envelope to create a more personalize touch
 - a. You can delegate/team up with your administrative assistant to help with the production of these letters.
- 10) Drop off at the local post office
- 11) When people reach out, begin your typical Capstone Hospitality Sales process
- 12) **Track** all leads and sales made in HubSpot

Pitch: Moving into a new community is stressful. Having a space where you and your family can meet likeminded families can help you feel more settled in your new area.

Implementation: Quarterly

Example: New Home Letter/Targeted Letter



THE GOLF CLUB of AMELIA ISLAND

Welcome Neighbor,

On behalf of our entire team, it is my pleasure to welcome you to Amelia Island as one of our newest residents. We hope your family is enjoying your new home and the beautiful surroundings afforded to us in this unique and picturesque setting. As a new resident of the island, often one of the biggest priorities is meeting new friends and finding places the entire family can enjoy. We offer a wide array of social events, most popularly, our Tuesday night Happy Hours, monthly wine club, weekly golf leagues, and the always delicious Prime Rib dinner held at the beginning of every month!

We are located directly in front of the Ritz Carlton and offer wonderful discounts and charging privileges with membership. Designed by US Open winner Gene Littler, along with local legend and The Players Championship winner, Mark McCumber, we are proud to offer our members one of the most scenic and challenging golf courses in the state of Florida. We also feature a private beach club separate from the golf course, complete with a beachside café, cardio room, an oceanfront private pool and beach access. It is truly a great place to bring the entire family, entertain guests, or just unwind after a long day.

Scheduled your private tour by February 28th and receive a complimentary round of golf or lunch, for two!

Thank you for your time and once again, welcome to Amelia Island!

Ben Getman

Membership Director
Golf Club of Amelia Island
4700 Amelia Island Parkway
Amelia Island, FL 32034
(904) 277-8015 ext. 3
BGetman@golfclubofamelia.com

Lead Generator: Direct Mailers

Objective: To reach a specific and qualified demographic with a direct mail postcard

Steps:

- 1) **Research** print/direct mail companies in your area/nationwide. Check to see if Capstone or your club already has a relationship with a company.
- 2) Contact companies to get quotes and timelines for your process
 - a. We recommend a large postcard, typically 8x5
 - b. The quality of the material used matters, typically the heavier the cardstock, the more expensive.
- 3) Generally the company will already have a database of homes based on area/zip codes.
 - a. You may need to get a list from another source, such as the post office. Select an area that matches your clubs demographic in terms of house values and location
- 4) **Receive** quotes from the companies, **present** to Capstone Management to select the best option.
- 5) Present your idea and the price to your General Manager for approval
- 6) The company has a design team that will design your direct mailer. You will need to send them club pictures, and the wording you want to include
 - a. Be sure to **include a hook!**
- 7) They will send you a draft for your approval, be willing to alter aspects you don't like
- 8) Once approved, the mailers will typically take 3-4 weeks to be sent out.
- 9) Submit the bill for the direct mailers
- 10) **Track** all leads and sales in HubSpot

Implementation: Twice a year

Example: Direct Mailer

(Front)



(Back)

This is your invitation to experience our club like never before.

Schedule an exclusive tour of our club and enjoy either

a free round of golf

or

free lunch

on us

Please call Dean Carrigan at (706) 524-8577 to schedule your private tour.

Offer expires 4/30/2018. Free round of golf or lunch is only available with a private tour.
Membership options will be discussed during tour.

www.westlakecountryclub.com

Lead Generator: Realtor Partner Program

Objective: To partner with top realtors in your community and have them connect their clients to your club through creating relationships and incentives.

Steps:

- 1) Review & alter Realtor Partner Program template to match your club and specific incentives
 - a. Meet with Capstone Management and then your General Manager
 - b. Incentives typically include, access to the club, short-term memberships for realtors, points towards an annual prize (a trip, golf cart, etc..)
- 2) Research top realtors in your area to begin connecting with
 - a. Check your membership database to see if any local realtors are current members
- 3) Work with your Events Coordinator to select a date and time to host a Realtor Event at your club.
 - a. They will help you create and plan a event with food, drinks, and entertainment
- 4) Visit local realtor offices to introduce yourself and invite their office to your event
- 5) The event is designed to create a great club experience for the realtors, and create relationships. You will present the Realtor Partner Program and get their business cards.
 - a. A realtor may want to become a member at the event
- 6) After the event, reach out to thank them for attending either via email, phone call, or hand-written cards
- 7) Each realtor office will hold monthly team meetings in which all of their realtors will attend. They allow someone from the community to present prior to the start of their meeting.
 - a. Schedule a time to visit each realtor office to present your club and the Realtor Referral Program.
 - b. Bring breakfast from the club
 - c. Bring program materials, business cards
 - d. Prepare a 5-10 minute speech about yourself, the club, and the program
- 8) Continue building your relationships with your realtor partners to promote trust and continued leads.

Pitch: This helps the realtor sell more homes. It is always a 2-way relationship – you are helping them to become the most informed and knowledgeable realtor about your club/community + offering a first-class experience for their most valued clients. Give realtors peace of mind knowing you are rolling out the red carpet for their clients. This can often times help their clients select a home quicker if they fall in love with your club.

Implementation: Immediate and ongoing

Example 1: Realtor Partner Program

- **Finding Realtor Offices/Realtors**

- Aim to find Top Realtors/Offices in your area. Look on sites like realtor.com for ratings, etc.
- There will be many more small ones to focus on as well.
- Not every agent is going to be a great source, but if you can infiltrate a new office (always start with setting a meeting with the head broker) and secure 1 or 2 more agents who love what we offer, that's a win.
- All markets have an association (AINCAR, etc.) (www.aincar.org) – you only want to work with these agents, not registered = not legitimate. Find the president of the association for that year and invite them out for lunch. They can help you tremendously. You can also do a realtor directory search, including cell phone and email – use this for chain emails (always send as BCC, blind carbon copy – if you have questions about this just let me know).

- **Consistency**

- Ensuring constant contact with Realtor Offices/Agents
- In-house & out of house Realtor Events, monthly realtor meetings, realtor networking events, etc. Bring club's food and packets for realtors w/ info for clients, info on website, and cozies/gift. Have these prepared and ready at any point for drop-in's and bring to ALL realtor events.
- Have touch-points built into your schedule, including office drop-ins (w/ gifts – food, rounds of golf, etc.), emails no less than every two weeks to see who you should be reaching out to
- Following through on the rewards your program solicits – organized and diligent in updating realtors about their client's progress. Gift certificates comp rounds, etc. Have to stay up to date on this!!! (**Ex. Below**)

2019 REALTOR STANDINGS			
	A	B	C
1		2019 REALTOR STANDINGS	
2	Karen Werling	Williams (2018 referral) - SIGNED	5
3	Ed Tucker	Norris - CONTACT INFO	1
4	Karen Werling	Millage - CONTACT INFO	3
5	Craig Brewis	Schirling - TOUR COMPLETED	3
6	John Holbrook	Cox - SIGNED	5
7	Susan Childers	Hennessy - CONTACT INFO	1
8	Susan Childers	Adams - CONTACT INFO	1
9	Sandy Moser	Benner - TOUR COMPLETE	3
10	Sandy Moser	Jones - TOUR COMPLETE	3
11	John Raker	Durham - TOUR COMPLETE	3
12	Mary Lavin	Tomassini - CONTACT INFO	1
13	Sandy Moser	Elledge - TOUR COMPLETE	3
14	Karen Werling	Volva - SIGNED	5
15	Sandy Moser	Bird - TOUR COMPLETE	3
16	Taylor Edwards	Edwards, B. - CONTACT INFO	1
17	Patti Burch	Terry - TOUR COMPLETE	3
18	Sandy Moser	Davenport - TOUR COMPLETE	3

○

Gift Certificate #	To Whom	What	Complete?	Redeemed?
3	Brenda Slater	comp round for 2	Y	Y
4	Joe Ann Bennett	comp dinner for 2	Y	N
5	Jordan Gallup	comp dinner/golf for 2	Y	Y
6	Kelley McCrimmon	6 month comp membership	Y	Y
7	Jordan Gallup	6 month comp membership	Y	Y
8	Brian F.	3 mon comp	Y	Y
9	Betsie Huben	comp dinner/golf for 2	Y	Y
10	Kelley McCrimmon	comp dinner/golf for 2	Y	N
11	Elizabeth Bandyk	(3) comp dinner/golf for 2	Y	N

- **Transparency**
 - Realtor Rewards Website (www.referamelia.com – password realtors)
 - Membership Info
 - Place to submit/refer new clients
 - Reminder of how the program works/accrue points, etc.
 - Leaderboard of yearlong contest
 - Personalized to GCAI – pictures, logos, etc.
 - Emails recapping who has done what, every two weeks at minimum. **(Example below)**

Greetings from The Golf Club of Amelia Island

As we are quickly approaching the end of 2020, we have had a huge push in realtor referrals, and in turn, have quite the race to win a 5-day cruise to the beautiful islands of The Bahamas. We were thrilled to have so many realtors attending monthly breakfasts to learn more about Club. As mentioned, our goal is to continue the traditions at the Club and to establish the GCAI as the center scene for recreational and social activities on the Island. Since the beginning of the year, we've received 46 total potential member referrals from 31 realtors, most recently...

- ∂ Brenda Chandler of Berkshire Hathaway HomeServices has received a complimentary round of golf or lunch for two, for bringing her clients in for a tour!
- ∂ Taylor Edwards of The Edwards Company has received a complimentary 6 month membership for referring his clients who recently began their membership!
- ∂ Andrew Sands of Summer Beach Properties has received a complimentary round of golf or lunch for two for referring his clients for membership candidacy!
- ∂ Karen & Paul Werling of Berkshire Hathaway HomeServices has put us in touch with a pair of clients who both recently joined the club, rewarding themselves with a yearlong complimentary membership!

I also wanted to take this opportunity to remind you of all the great benefits of our 2018 Realtor Rewards Program...

Referring Prospective Members Contact Information - 1 Point

Referring Prospective Members Contact Information that leads to completed tour = 3 points & comp. round of golf or lunch for two!

Referring Prospective Member Who Join GCAI - 5 points & 6 month complimentary GCAI membership!

Please visit our Realtor Rewards website, www.referamelia.com (*password: realtors*), where you can submit your referrals contact information, view the rewards/prizes for referring your clients, check the current year long leaderboard (for an all-inclusive 5-day cruise to The Bahamas) and lastly have updated membership information readily available for your key clients. The Race to the Bahamas' is truly anyone's for the taking, as more than half the realtors are within 2 referrals of the lead!!!

We will be hosting our next Realtor Breakfast, *Friday, September 21st, from 8am- 10am* in our Legends Lounge, where you can conveniently swing by to start your day off with fresh coffee, donuts, danishes, and bagels... We look forward to seeing you all there, & hope you have a wonderful rest of your week!

Realtor Breakfast

Stop by The Golf Club of Amelia Island for a complimentary grab & go breakfast!

Friday, September 21, 2018
8:00am-10:00am

Gourmet Pastries, Bagels,
Coffee & Tea!



New Year's Realtor kick-off party. Invite all realtors, present last year's winner, any new changes to this year's Realtor Program, membership offerings, etc. (Include Comp. beer/wine, hors d'oeuvres.) Also have a few raffles/prizes just for attending).

- **Partnership – not just mooching them for leads**
 - This is arguable most important to get the ball rolling. The better you present this part to them (especially the broker of the office), the more value they will find in your club and you individually. It is always a 2-way relationship – you are helping them to become the most informed and knowledgeable realtor about your club/community + offering a first-class experience for their most valued clients. What's better than after a long-day or week of searching for their new home, they can come have a complimentary meal/drink, round of golf, etc. Gives Realtor

peace of mind knowing you are rolling out the red carpet for their clients. This can often times help them select a home if they fall in love with your club.

- Provide realtors with all the information they need to be insightful into your club. For example, help them craft emails to send to their clients (**ex. Below**)

Hi Gerry and Susan,

I hope you are enjoying the new house and the island!

I know I briefly mentioned to you info about The Golf Club of Amelia and their full calendar of social events they have, but I wanted to give you an email introduction to their membership director, Tyler VanderMeulen.

GCAI offers a private beach club with beach access, championship level golf, tennis, discounts and charging privileges at The Ritz Carlton, etc. It's such a great way to get connected with others on the island.

I would love to meet you over there for lunch or for golf if you have some time, but I know Tyler would be happy to give you a tour of everything they have to offer too.

Membership@GolfClubOfAmelia.com

904-277-8015 ex.t 3

Example 2: Realtor Partner Program



We have created a referral program that not only helps you sell the **Chester County** lifestyle, but also **rewards** you for it!

Refer a new member that signs and receive referral points plus a **\$200 Dining Gift Certificate** or a **Complimentary Foursome of Golf** at White Manor Country Club!

Earn 50 points within a calendar year and receive a **One Year Complimentary Full Golf Membership at White Manor!**

Please contact **Bobby McCartney** by phone **610-647-1070 x 314** or email **membership@whitemanorcc.com**

*Prospective members must be referred prior to their initial contact with the membership office to qualify for points and prizes.

REWARDS

Refer a new member and when they join, you'll receive points plus a **\$200 Dining Gift Certificate** or a **Complimentary Foursome of Golf!**

Earn 50 points within a calendar year and receive a **One Year Complimentary Full Golf Membership at White Manor!**

POINT SYSTEM

Points for One Year Full Golf Membership:

1 point

Refer a prospect with contact information

5 Points

Referral signs as a Pool & Tennis Member

8 Points

Referral signs as a One Golfer or Junior Golf Under 40 Member

10 Points

Referral signs as a Family Golf Member

12 Points

Referral signs as a Corporate Member

Lead Generator: Current Member Referral Program

Objective: To build relationships with your current membership base to create highly qualified leads

Steps:

- 1) Review & alter Current Member Referral Program template to match your club and specific incentives
- 2) Meet with **Capstone Management** and then your General Manager to review incentives
 - a. Incentives typically include, discounted dues for both the current member and incoming member, points towards an annual prize (free dues, a trip, etc...)
- 3) Upon Capstone and GM approval, announce the program through various means
 - a. Through your clubs communication system, blast the program launch to members
 - b. Post flyers in high traffic areas
 - c. **Attend current member events** and have information available
 - d. Verbally communicate the program to current members
- 4) If it is appropriate at your club, **create a leaderboard** for the top members based on how many points they have accrued for referrals. This helps keep the program and grand prize in front of the members and creates fun competition.
- 5) When attending current member events, always discuss the program and have materials available. Members will often times remember a friend they want to refer when they see you at the event, however, they won't always remember to come to your office, so being visible at events is vital.
- 6) **Host** an event at your club for current members to bring friends who may want to join. This is also a good opportunity to thank the members for their help in growing membership at the club.
- 7) **Track the results and incentives.** You need to make sure that you are timely in awarding members who have referred friends their discounted dues and other prizes. If they don't feel that you are holding up your end of the deal, they will be less likely to continue referring friends.
- 8) Track all leads and sales in HubSpot

Pitch: As a member, this program helps you bring friends into the club while you both save money and win prizes. We are looking to grow our club with like minded individuals who enjoy spending time together and who want the club to grow and prosper.

Implementation: Immediate and ongoing

Example 1: Current Member Referral Program



As a current member, you are the club's most valued representatives!

With this program, when you refer a new member, **BOTH you and your referral receive a **FREE MONTH** of dues!**

You will also be entered into our year-long points race towards a

COMPLIMENTARY 2 NIGHT STAY AT THE RITZ CARLTON AMELIA ISLAND!

Please contact **Hobie Sears**
by phone **904.595.6841**
or email
Membership.jax@carefreeboats.com



PERKS

- RECEIVE A FREE MONTH OF DUES FOR EACH NEW REFERRAL
- HELP YOUR CLUB THRIVE
- ENJOY MORE TIME ON THE WATER WITH FAMILY AND FRIENDS
- ENJOY THE GRAND PRIZE FOR YOUR HELP

POINT SYSTEM

Points towards the Grand Prize :

1 point

Refer a prospect with contact information

3 Points

Referral signs as a Seasonal Member

5oints

Referral signs as a Full Member

*Prospective members must be referred prior to their initial contact with the membership office to qualify for points and prizes.

Example 2: Current Member Referral Program Leaderboard

LEADERS

Member	Points
Mark Scott	8
Ken Stevens	7
Teri Del	4
Eric Shulmane	4
Marie Colin	4
Meg Ryane	4
Bob Wheat	4
Trey Ballard	3
Bob Hallond	3
Mike Percey	3
Matthew Whiteman	3
Daniel Wurfly	3
Jeremy Comfield	3
Dan Hountz	3
Kay Delkins	3

POINT SCALE

Corporate	5
Champions	4
Intermediate	3
Young Executive	3
Junior	2
Tennis	2
Social	1
-For upgrades or reinstatement, take appropriate point total and subtract 1 point	

Lead Generation: Current Member Referral Event

Objective: In coordination with your Current Member Referral Program, host an event at your club for any current members who bring a prospective member as their guest

Steps:

- 1) Connect with Capstone Management and then your General Manager
 - a. Make sure your Member Referral Program has been implemented successfully
- 2) Meet with your **Director of Catering/Event Coordinator** to create a B.E.O (Banquet and Events Order) to plan for:
 - a. Date & time (**plan for at least 1 month out**)
 - b. Which room(s) in the club you will need
 - c. Estimated # of people in attendance
 - d. Food & beverage needs and preferences
- 3) Create invitations to begin marketing your event
 - a. Send a blast email to all current members about the event
 - b. In order to attend, current members **MUST** bring a guest that may be interested in joining
- 4) Track all members who have RSVP'd and record their guests name
- 5) When it's time for the event, stay focused on sales and don't get drawn into planning and implementing the event, that if your club's staff's job to ensure the logistics are correct.
- 6) **Collect all non-member attendees contact information**
 - a. Name, phone number, email address
- 7) During the event, be present, interact with all attendees, give tours, close sales
- 8) Track all leads and sales in HubSpot

Implementation: Twice a year

Lead Generator: Prospective Member Event

Objective: Invite prospective members to enjoy an event at your club with other prospective & current members. This will help them experience the club as a member would and get connected to the community of the club.

Steps:

- 1) Prospective member events can take many forms and be targeted at many different groups. **Be creative** and tailor your event to your demographic. See examples below.
- 2) Meet with **Capstone Management** to come up with an idea for an event
- 3) Meet with your GM to inform them of your plans
- 4) Meet with your **Director of Catering/Event Coordinator** to create a B.E.O (Banquet and Events Order) to plan for:
 - a. Date & time (**plan for at least 1 month out**)
 - b. Which room(s) in the club you will need
 - c. Estimated # of people in attendance
 - d. Food & beverage needs and preferences
- 5) Create invitations to begin marketing your event
 - a. If you have an administrative assistant, **delegate** this task
 - b. **You will market** your event multiple ways, email, phone call, in-person, social media, H.O.A's etc..
 - c. Stop in to as many businesses and organizations in your community to invite their staff and clients.
 - d. As you invite people, track who and when you invited them. You will need to **remind them multiple times** before the event
- 6) When its time for the event, stay focused on sales and don't get drawn into planning and implementing the event, that if your club's staff's job to ensure the logistics are correct.
- 7) **Collect all attendees contact information**
 - a. Name, phone number, email address
- 8) During the event, be present, interact with all attendees, give tours, close sales
 - a. **Have a "sign on the spot" incentive**
- 9) After the event, reach out to all attendees to thank them and follow-up to continue sales process
- 10) Track leads and sales in HubSpot

Pitch: It's a complimentary event. We have a lot of great new aspects of our club and we are excited to showcase them to the community. We would love it if you are able to attend and enjoy at night at our club.

Implementation: Host an event at least once a quarter

Example: Prospective Member Event

THE HAWTHORNS GOLF & COUNTRY CLUB
COMMUNITY DAY
FOOD DRIVE
BENEFITING:
GLEANERS
SATURDAY, NOVEMBER 11TH
5:30PM-8:30PM

EVENT INCLUDES

- ESCAPES ON THE RUN
- BOUNCE HOUSE
- DJ ROCK MY WORLD
- MINI GOLF
- MOVIE CHARACTERS & MUCH MORE...

ADMISSION FEE:
2 NON PERISHABLE ITEMS

COMPLIMENTARY
HORS D'OEUVRES &
CASH BAR AVAILABLE

PLEASE RSVP TO
HAWTHORNS MEMBERSHIP
AT 317.845.9100

THE HAWTHORNS

Common Ideas for Events

- Golf event with Happy Hour & Hors d'oeuvres afterwards
- Pool Party
- Community Festival (i.e. Fall Festival or Carnival)
- Family Night
- Live music
- Events with Strategic Partnerships in your community (i.e. car show, charity organizations,

Lead Generator: Home Owners Associations (H.O.A)

Objective: Connect with local H.O.A boards/Director to gain access to neighborhood residents in qualified neighborhoods

Steps:

- 1) **Discuss** with Capstone Management and your General Manager
 - a. Your GM may have contacts in the community that can help
 - b. Your club may be located within a neighborhood
- 2) **Identify** qualified neighborhoods based on:
 - a. Location to your club
 - b. Home price
- 3) Locate and identify the H.O.A of the neighborhood, this can be challenging
 - a. Lean on your realtor partners
 - b. Search property appraiser websites for your area
 - c. The neighborhood may have H.O.A information on their website
 - d. Visit the neighborhood, they may have the H.O.A on property
- 4) Once you identify your point of contact, **reach out** and attempt to schedule a phone call or a meeting at your club.
- 5) H.O.A's will rightfully want to protect their residents information. You need to approach this as building a relationship and an opportunity for their residents to learn more. Make it clear that **you are not going to attempt to solicit** to their residents.
 - a. If they are able and comfortable, hopefully you can gain access to their resident list and contact information. This will allow you to connect with each resident individually. If you are able to get contact information, approach it carefully.
 - b. If they do not give you resident information. Ask if they can send out information about the club on your behalf. This can include **an invitation to an event** at your club specific for their community. Some neighborhoods have an online communication platform and/or a **neighborhood magazine** that you can advertise in.
- 6) Track leads and sales in HubSpot

Pitch: I would like to simply introduce myself and our club. With how close your neighborhood is to our club, I think there could be a great partnership and opportunity for your residents. Ideally, I would love to reach out to each resident to introduce myself and invite them to the club for a complimentary lunch or round of golf. Would you feel comfortable providing a resident list. If not, would you be comfortable sending out a communicate on the clubs behalf?

Implementation: Immediate and ongoing

Lead Generation: Development Deal

Objective: Connect with local neighborhood developers to include memberships with the purchase of a new home.

Steps:

- 1) Connect with Capstone Management and then your General Manager to discuss parameters for the program.
- 2) Connect with Developer companies in your area that are associated with new neighborhoods that are in the development or pre-development stages.
 - a. You will most likely have to make it through gate keepers and assistants prior to connecting with the decision maker.
 - b. **Invite the decision makers** out to the club for a lunch meeting. Your club will pay for the meal.
 - c. The ideal neighborhood will have 25-100 homes, **with no amenities or an H.O.A**
- 3) Structure a deal where an Initiation fee is included in the sale of a home (every home in the neighborhood)
 - a. Upon closing on the sale of a home, **the development company pays the club** for the value of the initiation fee within 7-14 days.
 - b. Reduce the price of the initiation fee based on the development company including the offer in all of their homes for sale.
 - c. The new resident then has 30 days to begin paying monthly dues or they forfeit their complimentary Initiation fee. **This offer is not transferable to the next resident upon the sale of the home.**
 - d. This is an exclusive offer specific to that neighborhood. **Only have one deal at a time.**
 - e. Maintain and continue relationships, the developer may have a new neighborhood in the future.
 - f. The developer may want to become a member as well
- 4) Track how many of the homes sell but using a site map provided by the developing company.
- 5) Track all sales in HubSpot

Pitch: This partnership allows them to exclusively market their homes as including a complimentary membership to a premier country club in the new residents new community. This will help set their neighborhood apart, especially in this competitive market. The price of the Initiation fee is simply included in the sale of the home.

Implementation: Market dependent. Immediate and upon new opportunities.

Example: Developer Deal Contract



THE GOLF CLUB
of AMELIA ISLAND

MEMBERSHIP PROPOSAL AGREEMENT

TO: Developer Name and Neighborhood Name

FROM: Ben Getman , Membership Director

THE Golf Club of Amelia will provide the following:

- Initiation Fees of \$5,500 + tax for 9 Social Memberships
- Marketing materials for Developer Name and Neighborhood Name
- On-site representation from The Golf Club of Amelia Island when requested
- Allow Developer Name to market The Golf Club of Amelia Island as part of Neighborhood Name amenity package.
- No time limit on when homeowner can activate

Developer Name or Neighborhood Name agrees to:

- Include membership initiation fees upfront, total of \$49,500 + tax
- Offer various membership options to activate dues. (Home owners are not required to activate dues)
- Neighborhood Name owners may upgrade to Limited Golf Membership for an additional \$9,000 + tax or Full Golf Membership for an additional \$16,500 + tax, at any point in the future.
- Not disclose the amount paid for membership under any circumstance
- Market to potential homeowners as a membership provided by Neighborhood Name not complimentary.

Signed: _____
The Golf Club of Amelia Island

Date: _____

Signed: _____

Date: _____

Lead Generation: Strategic Partnerships with Local Businesses

Objective: To partner with local businesses and individuals who operate within a similar market/demographic as your club. (I.e. their clients can become your members and vice versa.)

Steps:

- 1) Connect with Capstone Management and then your General Manager
- 2) Research and identify businesses in the area that have clients that could become members of your club based on financial, location, and interests. Ideas for businesses can be:
 - a. High-end furniture shop
 - b. High-end car dealerships
 - c. Social clubs
- 3) Reach out to schedule a time to meet with the business owner. Have an idea of what you want to do prior to connecting.
 - a. Invite the community partner to the club for a lunch meeting. (Complimentary)
- 4) Be creative and come up with a:
 - a. A referral program
 - b. An event at your club to invite their client list
- 5) **Proceed with the steps** of creating a referral program and/or event as seen in prospective member event & referral programs.
- 6) Maintain relationships with business owners
- 7) Track leads and sales in HubSpot

Pitch: This opportunity allows you to provide additional value to your customers. Furthermore, my membership base will gain knowledge and access to your business as well.

Implementation: Outreach and relationship building is ongoing. Host an event quarterly

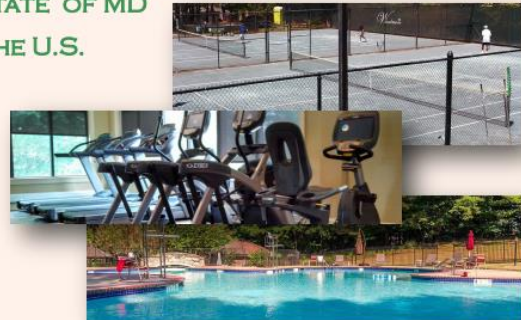
Example: Strategic Partnerships



- ♦ GOLF DIGEST RATED TOP 15 GOLF COURSE IN THE STATE OF MD
- ♦ FULL MEMBERSHIP AT 15 COUNTRY CLUBS AROUND THE U.S.
- ♦ MEMBER OF PACIFIC LINKS INTERNATIONAL
- ♦ SWIMMING POOL W/ RESTAURANT SERVICE
- ♦ HAR-TRU TENNIS COURTS
- ♦ FULL SERVICE RESTAURANT

- Schedule your tee time today

CONTACT OUR MEMBERSHIP DIRECTOR, GREG ROTZELL FOR MORE INFORMATION
301-249-8589 | MEMBERSHIP@CCWOODMORE.COM



Lead Generation: Guest Follow-up

Objective: Connect with guests of current members who have visited the club

Steps:

- 1) Identify and/or set up guest tracking systems in your clubs various departments.
 - a. Pro shop
 - b. Pool
 - c. Tennis
 - d. Restaurant
 - e. Guest tracking system can be as simple as a sign-in sheet or excel spreadsheet
- 2) Communicate with each department so they understand the importance of collecting guests contact information. See **Employee Referral Program** for more information.
- 3) Regularly (once a week) check the guest tracking system and collect guest information
- 4) Contact the guest from a perspective of customer service over sales. **These are guests of current members**, so you want to be extra careful with how you interact with them. Ask questions like:
 - a. How was your round?
 - b. Had you played the course before?
 - c. How was your visit to the club?
- 5) Identify if they have interest and proceed with sales process
- 6) Track leads and sales in HubSpot

Pitch: I am reaching out to introduce myself and see how your visit to our club was. It seems like you have enjoyed your time here and I would love to have you become a part of our club.

Implementation: Immediate and ongoing

Lead Generation: Employee Referral Program

Objective: To incentive club staff to collect and send guest information and any potential members information.

Steps:

- 1) Connect with Capstone Management & your General Manager to implement the Employee Referral Program.
 - a. If the program is already in place, connect with the staff in each department to keep the program in the front of their minds
 - b. **Incentives** can include, complimentary employee lunch at the club for a week, club apparel, PTO etc... incentives must be approved prior to implementation
- 2) If the ERP has not been implemented yet, introduce the program during a Department Head Meeting. Highlight how the program helps the club and each departments staff. Help with suggestions regarding information collection and what counts as a referral.
 - a. In order for a **referral to be valid**, it must be presented to the Membership Sales Director prior to contact to or from the MSD and the guests information can not already have been in the guest collection system. (see above program).
- 3) *Optional, if it feels appropriate at your club* Create a leaderboard (like the Realtor & Member referral programs) that faces employee areas. This can help keep employees engaged.
- 4) Be sure to communicate your appreciation and messages of teamwork and gratitude for the staff's help
- 5) **Create** a tracking system (excel spreadsheet) to track employee contributions and incentives
- 6) **Contact** leads generated and begin sales process. See Guest Follow-up to see how to proceed with sales process with guests of the club.
- 7) Track all leads and sales in HubSpot

Pitch: My goal is to help our club thrive through new memberships. The more members we get, the more tips, lessons, merchandise sales etc.. will be available. This program is designed to help us collectively continue to grow this club.

Implementation: Immediate and ongoing

Lead Generation: Current Member Upgrade Program

Objective: Incentivize current members to upgrade to a higher level of membership.

Steps:

- 1) Connect with Capstone Management and then your General Manager to specify what the program will entail
- 2) Through your clubs membership software, collect all members information for the lower categories (social, athletic, etc...)
 - a. Be sure to reference and understand your clubs by-laws regarding upgrades
 - b. Most clubs will have an upgrade fee (typically the difference between the two levels initiation fees. **This upgrade fee counts towards your monthly goal.**
- 3) Advertise the Upgrade Program through a blast email and/or through your clubs email communication system.
 - a. You can also create flyers to place around the club during the Upgrade Program timeframe
- 4) As members contact you to learn more, proceed with sales process.
 - a. Be mindful of interacting with current members vs prospective members. Make the current members feel extra special as they are already members.
- 5) Ideas on how to implement and when:
 - a. During spring, hold an upgrade golf clinic free to all members thinking of learning to play golf, or who want to play more golf. Attend these clinics to interact with members who may upgrade.
 - b. During the holidays, you could promote an Upgrade Program to a membership level that includes the gym for New Year's Resolutions.
- 6) Track all leads and sales in HubSpot

Pitch: If you have been thinking about playing more golf, are using the gym, this is the perfect opportunity. I know you have already paid an initiation fee, but with this reduced upgrade fee, this is a great opportunity to start enjoying the club in a more complete way.

Implementation: Once or twice a year

Lead Generation Example: Current Members Upgrade Program Flyer



Membership Upgrade Opportunity

FOR 2 WEEKS ONLY UPGRADE YOUR
MEMBERSHIP FOR 50% OFF!!!

All members can upgrade their existing membership to ANY level of membership for 50% off the original transfer fee! Huge savings of up to \$5,000!

The first 10 members to upgrade to a Titanium Level Membership during this time will receive six (6) months of complimentary cart fees and no dues change until January 1, 2017! Take advantage of these savings while you still can!

Contact the membership department membership@hawthornscountryclub.com or by phone : (317)-806-5010 to reserve your spot today! Offer expires September 15, 2016.



The Hawthorns Golf & Country Club | 12255 Club Point | Fishers, IN 46037 Phone: (317) 806-5010
www.hawthornscountryclub.com | membership@hawthornscountryclub.com

Lead Generation: Past Member Reinstatement Program

Objective: Connect with past members to reengage them with the club and have them rejoin.

Steps:

- 1) Connect with Capstone Management and then your General Manager to create parameters and incentives for program
- 2) Through your clubs membership software system, **collect** all past members contact information
 - a. **Double check** that they have not since rejoined the club
 - b. Make sure they are **eligible** to return to the club (some past members left on bad terms either relationally or financially.)
 - c. It could be helpful to meet with a club employee who has been at the club for many years to ask about the past members of your list.
- 3) Reference your clubs by-laws regarding past member reinstatement
- 4) Create a blast email to send to all eligible past members.
- 5) After sending the email, **call** each member to create a personal touch.
 - a. These are past members and want to feel like an important part of the clubs history.
 - b. **Be prepared** to encounter past members who are still upset with the club. Deescalate and ensure them that the club will no longer reach out.
 - c. Other members may have moved away, have a deceased spouse, etc..
- 6) When you connect with a past member who has interest in learning about how the club has changed and your Reinstatement Program, continue normal sales process while **making them feel special** and that having a past member rejoin the club is great.
- 7) Track all leads and sales in HubSpot.

Pitch: We have a lot of great things happening at our club, and as a past member, it means a lot to us when you are willing to and able to rejoin us. You are a part of the history and tradition of this club. We respect that you paid an initiation fee in the past, which is why we are offering the ability to rejoin us at this reduced rate.

Implementation: Once a year

Lead Generation Example: Past Member Reinstatement Blast Email

Dear Mr. Johnson,

I hope this email finds you well. My name is Mitch Miller and I am the Membership Sales Director at Capstone Country Club. As a past member of the club, you hold a special place in the history of CCC. Because of this, I wanted to share with you some exciting new updates at the club!

- A 1 million dollar golf course renovation
- 4 new pickleball courts
- A new golf simulator
- A revamped social calendar

As a past member, I wanted to let you know of all the great things that have been going on at the club. I also want to extend an opportunity to rejoin the CCC family during our **2 week Past Member Reinstatement Opportunity!**

Please feel free to contact me to learn more! I look forward to speaking and welcoming you back to the club!

Best,

Lead Generation: Blast Email

Objective: To reach a large number of your cold leads

Steps:

- 1) Connect with Capstone Management to determine what incentive to include in the email
 - a. **Do not** send a blast email to your hot or warm leads
 - b. Blast emails are designed to reengage with colder leads
 - c. These emails are great to send for a quick pop in sales at the end of the month
 - d. These emails **must include a hook**
- 2) Make sure your list **does not contain any current members.**
- 3) Send the blast email through HubSpot to track results and if prospects open the email
- 4) **Do not include** the exact price or discount in the email for two reasons
 - a. Prospects may be less likely to reach out if they know the pricing
 - b. If a current member/member who recently joined see's the email, they may be upset
- 5) As prospects reach out to learn more, continue with normal sales process by attempting to **get the prospect on the phone** before giving them more information.
- 6) Track all leads and sales in HubSpot

Implementation: Quarterly or as needed

Lead Generation Example: Blast Email

Good Afternoon,

I hope this email finds you well. With golf and pool season right around the corner, I wanted to update you on some great opportunities here at the club!

-A new simulator room with men's and women's leagues

-A robust year-round social calendar

-Our 100 year anniversary

-A new Executive Head Chef

We are excited to offer an incredible saving opportunity to the next 5 new members! There is no better time than now to learn more about CCC membership opportunities. Please feel free to contact me at your earliest convenience to learn more about the club.

I look forward to welcoming you as our newest member!

Best,

Lead Generation Program: Facebook/Social Media Advertising

Objective: A low-cost option to target a wide-reaching and specific audience

Steps:

- 7) Determine if your club already has a Facebook/Social Media page. If so, get the account name and password. If not, upon receiving approval, set up a Social media account and page for the club.
 - a. Create and use a page specifically for the club, do not use a personal account
 - b. Your job is to create new leads through Social Media, not to oversee and update the clubs social media page.
- 8) Log into the club's Facebook account and go to "promote" (their terminology may have changed since this was written.)
- 9) Select the type of advertisement that works best for your type of ad or event your promoting.
 - c. Facebook provides a tutorial video to help better understand which type of ad will work best for your goals.
- 10) Set a budget. Typically these ads are inexpensive and you can set a daily or overall spending limit. An ad that runs for a couple of weeks is generally between \$300-\$500. The higher the budget you set, the more people you'll tend to connect with.
- 11) Set specific demographics you want to target. For example. You can type in "golf", "pga", "families", etc.. You can set your radius for how wide you want your ad to be seen away from the club.
- 12) Select appropriate pictures of the club and choose wording that is enticing and draws people into clicking on your ad.
- 13) Once you have completed your ad, it will go through an approval process with Facebook. This typically takes 30 minutes to 1 day to complete. Afterwards, you will be notified that your ad is now live.
- 14) While you ad is live, you can track the effectiveness and how many people it is reaching. You can make any necessary adjustments to improve your results.
- 15) As people see your ad and respond, their responses will be directed to the clubs' Facebook page. Check the Facebook page and keep a list of incoming leads.
- 16) During set up, you will select an end date for your ad. At the end of the campaign, the card you put on file will be charged. Submit the bill to your clubs accounting department
- 17) **Track** all leads and sales in HubSpot

Implementation: Quarterly/ your club may have an ongoing campaign

Example: Facebook/Social Media Advertising

West Lake Country Club

Sponsored · 🌐

Start 2018 off with family and friends! Call now for our New Year Membership Special!

**Premiere Family Country Club
in Augusta!**

**Voted #1
2018**

Like

Comment

Share

Lead Generation: Presence at Non-Member Events at your Club

Objective: To connect with guests of your club during their outside event

Steps:

- 1) Get a calendar of outside events from your Director of Catering.
 - a. There may be certain events where it's appropriate to have a Membership table set up with membership information and your cards (a golf event as opposed to a wedding)
- 2) Have a presence at the event to introduce yourself and membership information.
 - a. You could collect attendees business cards for a drawing
- 3) Contact all leads created at event and continue normal sales process
- 4) Track all leads and sales in HubSpot

Implementation: Immediate and ongoing

Lead Generation: Catering Leads

Objective: Use teamwork to connect with guests who have visited the club

Steps:

- 1) Meet with your Director of Catering to discuss sending potential leads to one another.
 - a. These can be good leads as they have already visited the club
- 2) Create a blast email to send to the leads
 - a. They were guests of the club and leads gained from a Director at the club, tailor your email and wording to be appropriate
 - b. Call each prospect, as with other guest leads, start with asking questions about how they enjoyed the club
- 3) As prospects reply, proceed with normal sales process
- 4) Track all leads and sales in HubSpot

Implementation: Immediate and ongoing

Lead Generation: Door to Door

Objective: Interact with local neighborhoods and residents to introduce yourself and your club

Steps:

- 1) Identify local neighborhoods that are qualified candidates for membership based on home value and location to the club.
 - a. For clubs within a neighborhood, **introduce yourself to new residents** of the neighborhood with a gift basket from the club (invitation for a complimentary lunch or round of golf with a tour)
 - b. Some neighborhoods have a no solicitation policy, so just introduce yourself to each resident. You can create an invitation to an event or complimentary lunch with a tour.
 - c. It is **against Federal Law** to put something in peoples mailboxes, so be sure to either hand them the invitation or leave it at their door.

Implementation: As needed

Lead Generation: Newspaper Ad/Magazine Ad

Objective: Advertise to local community through a newspaper ad

Steps:

- 1) Connect with Capstone Management to determine pricing options and to get ad approval
 - a. Some larger publications are expensive, so selecting the price of the ad based on reach of the publication is important.
- 2) Contact local publication companies (there are typically publications that range from a large reach to a neighborhood publication) and get pricing options.
 - a. Pricing will typically change based on size of ad, location of the ad in the publication, day of the week the ad will run.
 - b. Work with publication company, your GM, and Capstone Management to identify best price point.
- 3) Create verbiage and pictures for publication company to use
 - a. Ad must have a hook. Even these ad's need to have a call to action, they are not just advertising.
- 4) Select ad option and run day. Have the publication company invoice your club.

Implementation: As needed (this may be market & community specific)

Appendix: Lead Generation Calendar Example (Timing and specific events will vary)

J DIRECT MAILER MEMBER REFERRAL LAUNCH PARTY	F NEW HOME LETTERS	M REALTOR EVENT FACEBOOK AD
A PAST MEMBER REINSTATEMENT	M UPGRADE SPECIAL PROSPECT 9 HOLE GOLF EVENT	J NEW HOME LETTERS MEMBER REFERRAL EVENT
J REALTOR EVENT POOL PARTY EVENT	A NEW HOME LETTERS H.O.A WELCOME BASKETS	S DIRECT MAILER FALL COMMUNITY EVENT
O BUSINESS PARTNERSHIP EVENT	N BLACK FRIDAY SPECIAL	D NYE UPGRADE SPECIAL REALTOR & MEMBER REFERRAL EVENT