Golf Convergence

Golf Management Software
Successes vs. Failure – A Very Fine Line in Presenting to Potential Clients
By J. J. Keegan
2006

Executive Summary

An extensive review of golf management systems was performed. Invitations to respond to an abbreviated request for proposal were sent to over 20 firms. Of the 13 respondents, seven were selected for a web based demo, three "finalists" were chosen for an on site demonstration resulting in the selection of a single vendor that was deemed by the golf course staff to best match their current operational requirements.

During the process, some firms distinguished themselves while others languished. The effort and creative means by which some firms attract and retain the potential client's interest was amazing. Other firms made errors that were fundamental.

There are over thirty software firms serving the golf industry with many outstanding solutions available. I noted that the typical golf course has a great deal of difficulty in differentiating between vendors and the modules available. In fact, some courses seem to make decisions based on whim rather than facts, and with limited time to devote and numerous options to study, it is easy for a software firm to become discouraged and only make a half hearted effort, i.e., the creation of a boiler plate response.

Such an approach is fatal, as more vendors with "bigger, better, newer" verbiage cloud the horizon, the risk is that style will win over substance. This article will present some ideas that will make your proposal far more effective and reduce the time you invest in selling to a specific client in each phase of the sales cycle.

The selling process involves three steps:

1) Responding to a Request for Proposal
2) Web based on line demonstration
3) On site demonstration

By observing the strengths and weaknesses exhibited by various vendors in each of these areas, you can glean for yourself the optimum approach that best matches your firm's and your personnel style thereby providing a foundation for your firm's future growth.

The goal of this article is not to make "clones" of each firm so that you respond identically but rather to present ideas for your reflection on how you can differentiate yourself in a very

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competitive market. When a customer can not differentiate between products, price unfortunately becomes the sole criterion on which a decision usually becomes made.

The solutions that are available today are outstanding, vastly different and nearly all meet the requirements of courses to provide an attractive rate of return on investment to the software firm.

Each firm can succeed if it knows what its niche is. Your ability to briefly, clearly, and in specific language express what is unique about your solution; whether it be in the functionality of the software, the installation, training, support, future development or consulting services available will determine how successful your firm will be in 2006.

1. Request for Proposal

The Ideal Proposal

Moan. RFP, don't you hate them? That was clearly evident with each firm we talked with They all felt the process is historically laborious, ineffective and doesn't position their firm in the best light.

Ideally, the best way to sell is to avoid the RFP in its entirety. Find a course seeking a solution, counsel and guide them and obtain a contract without a competitive "face-off." Unfortunately, with the proliferation of vendors, trade shows and the easy access to information, the ability to "slide in under the radar" to secure a client without engaging in a competitive process is growing less likely. Shucks!

To add insult to injury, a proliferation of new vendors is entering the golf software markets with (by their own proclamation) "*the best, most robust, customer friendly solution ever available*."

In response to the press release issued by Golf Convergence regarding the recent services provided, I was contacted by four firms, none of which I had heard of previously, all making the same claim – they are going to blow all other vendors away. This kind of flash does indeed get attention; whether or not they have the capabilities to service their sales. This approach insults my intelligence and probably that of the course staff. In today's market, humility rather than being over the top is a potent sales tool.

In 2006, the watch word is "simplicity." In today's society, we are all overwhelmed by email, voice mail, media, sales hype and the diminished lines of delineation between home and work.

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The fundamental question you need to ask is,"How does *THEIR* investment in *YOUR* product increase the net income of a golf course and make their job easier?" You must answer that question in less than 50 words.

Proposals that are brief, focused, and clear will differentiate your firm from most others. In response to the RFP (which was only 11 pages) one firm responded with over 100 pages. This novel wasn't read, and at best was merely scanned by the golf course staff. It was interesting that the comment was,"I hope their software manuals aren't this big. Our staff would never learn their software." Quick elimination.

A software firm would be well served to only provide a cover letter that clearly differentiates your strengths, identifies how your software best matches the unique operational requirements of that facility, and provides examples of how your solution will generate a positive return on investment.

Presented below are a couple of examples, to illustrate these points. Note: none of these examples appeared within any response received as the protection the intelligent property inherent within the submitted proposals remains paramount:

A. <u>Differentiating your solution:</u>

"With turnover at your golf course probably nearing 25% annually, keeping the staff trained in the full use of the software is difficult. While our software is intuitive as evidenced by…, we provide a web based training course at the beginning of each golf season for your staff.

"Also, we are empathetic that the daily pressures of operation limit the time available to yourself as the general manager and your staff to effectively manage the tee sheet and implement timely and creative pro active marketing programs.

Our solution provides an answer for this dilemma. Our forecasting tools, which integrate with the NGCOA benchmark program, facilitate adjusting your policies dynamically. Our consulting services which comprise…,will guide you to ensure that your revenue is maximized."

B. <u>Unique Operational Requirements</u>

"Your proposal identifies three specific requirements as your most important criteria in selecting a new firm:

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1. Ability to host a private label web site,
2. Integration to MICROS and
3. The ability to seamlessly export to Quickbooks.

Of our X,XXX customers, we fulfilled this exact requirement for XXX of our clients. You can witness the benefits of this solution at XX golf courses that use our software within thirty (30) miles of your course."

C. Dynamic Return on Investment

"Today's leading golf course operators are leveraging the benefits of current software solutions to maximize revenue by ensuring a heightened customer experience. On line reservations, email marketing, wireless services in the clubhouse and according recognition to loyal customers are just a few of software services being adopted today by our clients.

We look forward to implementing these tools on your behalf which will reduce labor expenses in handling reservations and provide **instant identification** of your best customers. We believe that an investment in our software will produce a demonstrable return of $25,000 next year in incremental income."

Beyond the cover letter, strive to limit your proposal to a one page summary of the "exact" investment required by the course, and a few appendices that list the modules available, pictures of key screens, and references for golf courses in the immediate geographic area. Interestingly, corporate brochures are almost required but add little value to differentiating your firm as they tend to all 'blend' together.

Maximizing the value of dollars spent invested in selling and retaining customers once secured is essential. By realizing that a golf course will compare various firms, positioning your firm properly is advisable if efficiency and profitability is your goal.

Mistakes Made

In the recently completed RFP process, we noted the following errors:

A. A cover letter with physical address, email address and toll free number was not provided by 4 of the 13 responding vendors. It is really frustrating to have to look up a vendor's phone number that is not readily available within their response.

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B. The exact investment for software, installation and training was only provided in 6 of the 13 proposals submitted. Many vendors only quote the standard list price by module or what the training rate is per day. They don't tailor the quote to the golf course, which forces staff to "calculate" what they believe the price would be.

Clearly stating how your software is "priced" is important. I was surprised that among the 13 responding vendors, five different pricing models were used: a) licensing simply based on number of courses, b) number of workstations installed, c) number of employees accessing the workstations, d) fixed monthly fee, and e) number of reservations booked.

With so many different pricing modules, you can understand how course personnel can become confused. I have always believed the licensing method based on number of courses was the easiest to understand. Having to count workstations or employees becomes perceived as an "internal control check" on their integrity. Who isn't likely to understate their requirements to obtain a lower price? The investment simply stated by extension creates confidence in the course staff as to the efficiency of your software and your firm's operation.

Regarding training, nearly all vendors listed a fee per day. Few vendors listed the number of recommended days for training, which prevented the calculation of the total training expense. An easy-to-read table which provides a line item for 4 days of training at $500 per day for a total cost of $2,000 would be appreciated. Being ambiguous about the estimated cost of your service is frustrating to the reader and could lead to early dismissal.

Other variable expenses such as data conversion, installation, travel estimates were only vaguely addressed or omitted.

C. The responses received contained an incredible amount of "boiler plate" that take space and doesn't add meaning. Statements like:

1. "Our 24 x 7 support is outstanding." (Whose isn't?)

2. "Our strength is our ability to deliver on promises." (Really?)

3. "We have a superlative set of solutions." (Give me a break.)

4. "The majority of our special development is at no charge. Our custom development is available for a nominal fee." (I ask, what is the difference between special and custom development?)

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5. "Please feel free to call" (rather than "Please call")

6. "We provide the most cost effective, easy to use and flexible solution." (They were one of the highest price alternatives.)

7. "We provide extensive reports." (How many report-writing tools available and how many standard queries are pre-loaded?)

8. "We provide many standard reports with multiple print options." (So what, who doesn't?)

9. "In the meantime, thanks, again (sic)." (I personally prefer the aggressive close; "We look forward to earning your business by displaying how your golf course will benefit from…")

While the number of examples that we could present are nearly limitless, the statements above are "qualitative" vs. "quantitative, factual or specific." A precise proposal, uncluttered, that provides specific examples creates the most favorable impression in the minds of the course staff when they view it.

D. In attempting to seek clarification to the vendor's written submission, the average response time was 36 clock hours from the time the call was placed. I was surprised by the lag and many of the "excuses offered."

In two instances, the vendor did not respond to multiple calls placed in which we were requesting clarification and to schedule an on line demonstration. Why submit a bid if you aren't going to respond timely?

It was interesting to watch the evolution of the staff's opinion about various firms. Their perspective was that a vendor's response to an inquiry to an RFP is indicative of how timely customer support would be if your firm was selected.

At one point in the selection process, the client called the support department of three firms on a Sunday morning to determine their responsiveness: 2 minutes, 12 minutes and "no response after being put on hold for 15 minutes" were the results. This simple test weighed heavily in the minds of the course staff.

By not responding to the telephone calls, they created the impression in the mind of the client that the firm 1) wasn't *interested in their business* and (2) *wasn't professional*.

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A software firm opens themselves to a huge risk in this circumstance. As other course owners call them to get insight on who was selected and why, a discussion of the non-responsive vendors is a great probability among the course staff. This potential conversation is fatal: "ABC and CDE submitted proposals, but never responded to our calls for clarification. I would suggest you not extend an invitation to them." By submitting a proposal and not responding timely, you create negative goodwill and damage your firm's brand image.

Not all solutions are a good fit for the course's requirements. Identifying your target market, i.e., municipal, daily fee, resort or private club, is essential to optimize your chance of selection. The first key to your firm being selected is ensuring that your solution best meets the unique operational requirements of the golf course.

E. Other mistakes made:

1. Using technical language that a golf course has no chance of understanding, 'We use the TCP/IP protocol on a broad range of systems such as Linux, Unix, ME, etc." or "Our software was developed using 4GL, ODBC." This is particularly dangerous in the 2nd paragraph of the cover letter.

2. Listing a potentially negative reference. For example, if you were serving a management company that was using multiple solutions, and you referenced one of the management company's courses who was using your solution but hated it, ouch. Know your references! I would highly recommend checking your references by "blind shopping the reference" before you provide their name in an RFP response. Even better, don't merely list the course; list the name of a specific contact who will give you rave reviews. Include their phone number and email address.

3. Providing references that aren't comparable to the potential client. Why would you list a lot of private clubs if in fact the potential course was a municipality or high end daily fee? A few well chosen references are far more effective than listing we serve XXXX including the courses whose names are easily recognizable. Name-dropping can be done in an appendix of current customers your firm serves.

4. Submitting a response to an RFP in which you don't clearly meet the criteria, i.e., could only display 3 courses on the screen simultaneously for a potential client that has four courses, could not create three "merchandise stores" from a central database, couldn't integrate to MICROS, didn't export to Quickbooks,

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didn't host private label web sites only reflects your firm in a poor light. If your software doesn't fit the niche of the course seeking a solution, it would be my suggestion not to respond.

The recommendation is, know what your strengths are and either fully engage with the potential client or don't respond thinking you might be able to "blow it by them" into buying your solution even though you know it may not be the best fit.

2. On Line Web Based Demonstrations

A convenient way to preview your product economically and efficiently–with risk.

Of the seven vendors who conducted on line demonstrations, several different alternatives were presented, including Webex, Live Meeting, NetMeeting, and GoConnect, etc. Functionality offered by the "Internet connection" tools, i.e., the ability to provide a white board, messaging, etc., was not used or needed.

The most effective illustration was having the golf course staff connect via "ftp" to the vendor's server in which the software was loaded. Two vendors who used this approach held the attention of the staff.

Another innovative presentation led the potential client to a web site that was customized to look identical to that client's current web site, had the GM book an on line reservation, and proceeded to the tee sheet displaying the tee time that was just booked on the web. They then rang up the tee time with the GM's name via the integrated tee sheet, issued him a gift card and showed him how many loyalty points have been earned by the transaction. The integrated flow in which the GM triggered the booking, and his awed statement: "oh my gosh, I just got an email confirmation on the reservation," clearly made a huge impact.

Risks of Web Based Presentations

While these tools herald the ability for remote users to get quickly connected, the average time expended to link four (4) remote computers with the vendor was 15 minutes. As a result, precious time in displaying the benefits of your product is lost. Additionally, some course staff personnel are "intimidated" by this process and walking them through connecting, logging in and joining the session created "tension" within them.

The software vendor that had the best depth and breadth of functionality and completed the given exercise in 19 minutes unfortunately lost momentum because the "look and feel" of their software was very outdated, though in Windows. This lowered their ranking by the course

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staff, in favor of others -who didn't meet all of the course's operational requirements - but whose solutions was very "pretty" and appeared "innovative."

The expression that "a picture is worth a thousand words" was exemplified by these demonstrations. A web based demo in like window shopping. The course can quickly differentiate their likes and dislikes without getting involved in many details.

While the speed of 4 of the 7 firms was "acceptable", the lag in two presentations was so noticeable that it interrupted the rhythm and flow of the presenter. By the end of two presentations, the presenter was verbally at lease three screens ahead of what the course staff was seeing.

I observed that course personnel, not sure what they should be looking at, did not comment when the presenter was describing features that were not displayed on their screen. The predictable reaction of the staff was, "Their software is confusing. I could never find what the presenter was discussing thus; the product must be hard to learn." Amazing how a wrong conclusion is quickly reached.

Another advisory of web based demonstration is to be very careful who you conduct these demonstrations for. Recently we heard that one software firm called another representing themselves as a golf course. The unsuspecting software firm did a two hour, on line demonstration for their potential competition.

For the trained user, the ability to do "print screen and paste into a word document" is very easy as you are watching a web based demo. In conducting such a demonstration, you must clearly understand that every screen you display can be copied by the viewer and if their intent is wrong, your intellectual property can be easily compromised. You don't give away free copies of your software to competitors, but in doing a web based demonstration; this risk is inherent.

While it is beyond the scope within this article to speak of the morality of such a practice of competitors feigning to be prospective clients, be cautious is the recommendation. Know the market and verify those requesting your expertise.

Other Observations

In conducting a demonstration for a potential client, the following Dont's and Do's are givens:

A) Don't

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1. Begin the demonstration by saying, "I understand that we have allocated only 30 minutes for this demonstration which is good. That is all the time I have to allocate to this."

2. Answer every question asked by the potential with, "Correct."

3. Be repetitive. The next step is, the next step is, then the next step is and the next step is. At this point, the next step is…

4. Over-focus in the introductions, pausing while each person is introducing themselves asking them to repeat their names. Without the ability to see them, your ability to be able to recall them by merely their voice is nearly an impossible challenge.

5. Warning messages were seen in 3 of the 7 software demonstrations conducted. For example, one vendor attempted to demonstrate how to book a tee time 90 days in advance, when the software is configured to only allow booking 14 days in advance. The error message eroded the viewer's confidence.

6. Undertake a Power Point presentation to provide a profile on your firm. The presentation can be emailed to the client "after" the demonstration if they have a desire to review it. Course staff are really interested in how they are going to use your product, not who you are or your corporate background.

7. Don't flaunt what town you're from and the superiority of your football team, especially if your team is playing against them the next weekend. The attempt to befriending them into a competitive rivalry doesn't play well in an initial conversation.

B) The Do's

1. Outline at the beginning of the presentation what you intend to cover.

2. The time you invest in configuring your laptop to align with their operation, is very worthwhile. One vendor was respectful enough to build a web site with all of the graphics of the potential client. That effort was acknowledged by the staff after the presentation.

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3. Configure your demonstration with the client course name.

4. Configure the rates and fees with their published rates for each player type.

5. Be sure you are using a phone that has conference call capability in which the amplification for the remote users is sufficient that they can hear each other's questions. In one case, a salesman called his corporate offices which set up the conference call. It was very difficult to hear the salesman.

6. Review the course's web site and gain as much information about their operation as possible. This enables you to ask specific questions tailored to their course. To be informed is to show respect for the client. Asking a daily fee course, "How many members they had," clearly reflected the salesman didn't realize that the potential customer was one of the pre-eminent public courses in America.

7. Test the course's connectivity before the scheduled presentation. If they are using a dial up line, I suggest that a web based demonstration would best be deferred. Ensuring that the computer (s) that are to be used have the software loaded accelerates the demo process.

8. Have a few golfer's names in your repertoire in which their profiles are complete including a valid credit card, gift certificates purchases, loyalty points accrued. Attempting to book a reservation for a golfer with an expired credit card that creates a warning message prohibiting or attempting to demonstrate the redemption of a gift certificate for a player that hasn't purchased one makes the presenter look untrained.

9. Be careful in typing in names. Two vendors tried to display "loyalty" points but you couldn't remember the names of the players they just booked and checked in.

10. Explain that there might be an "Internet lag" in their screens and encourage them to confirm that their screens are in synch with your script.

11. Make sure that they can see entire screen. In 2 of the 7 presentations, the set resolution was insufficient to accurately display the entire screen. I believe that an industry standard of 1024 x 768 could be assumed.

After nearly every presentation, I heard a comment by the course's staff regarding their opinion as to whether the presenter had taken the time to understand their operation.

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Knowing the details of their course does give you an edge, and making statements that indicates little knowledge of their facility is harmful.

Web site presentations should be quick, limited to the review of only a few screens, and demonstrate core functionality. This medium is not optimum to present a full demonstration of your product. It is best used as a gateway to an on site presentation. Course personnel are merely trying to ascertain "does it look good and does it look easy?"

3) On Site Presentation

While the sales personality of an individual can help during the Web based presentations, an individual sales style is not much of a factor during the on site demonstration. I found that to be surprising.

The key determinant measured during the on site presentation was the depth, breadth and ease of perceived use *of the software*. The on site presentation is scored similar to that of ice skating. The evaluation of a presentation is almost measured by the how few mistakes they make. Sad but true. Corporate power point presentations, reports and marketing literature distributed were not a factor.

Also contradictory to my prior thinking, a calm balanced approach is far more effective that a passionate presentation. Imagine that the audience is a lake in which there is not a ripple. Movements by the presenter going to and from their laptop and pointing to the screen, create "motion" or ripples on the lake. The more ripples, the more discordance. I almost felt that one presenter, who did not use a hand held pointer, almost subconsciously and certainly unintentionally created a lot of nervous energy as he walked back and forth from his computer to the screen that ultimately may have dissipated the staff's enthusiasm for his software.

The course staff is seeking calm and to maintain the status quo in which change is brought out gradually not radically.

What emerged from watching three on site presentations is that there are clear and distinct steps to deliver an effective on site demonstration. I believe the winning steps include:

A) Before the presentation, the following material should be distributed to the audience:

1. Agenda as to what will be presented in sequence by functional area. There are many advantages:

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a. Having listed the item on paper, the presumption is that you do it.

b. When the audience knows what will be covered, they are less likely to ask a question that is not related to what you are demonstrating at that moment. They are likely to wait and ask the question at the appropriate time. Without an agenda, you are subject to the risk that your presentation will be directed and sequenced by the questions.

2. Have key reports printed. The operative word is "key." Having a binder with about 10 reports, i.e., tee sheet, daily close, yield forecast, etc. is very effective.

3. List of clients within thirty miles of the course providing contact name, phone number and email address. One vendor presented a list with over thirty client references within 50 miles. The impact on the course staff was measurable and reassuring because they knew many peers who were using the software.

4. 'Scoring sheet'–asking the audience to note the strengths they observed and the weaknesses they noted is very beneficial. Even if your firm is not selected, the feedback you have gotten from a neutral audience regarding the software and your style of presentation is very valuable. It also demonstrates that you are committed to improvement, which speaks volumes.

5. Question form for people to write question without interrupting your flow.

B) During the presentation, I believe that focusing on your audience and demonstrating superior listening skills is more valuable than dazzling them with how quickly or well you can "blow" through your software.

One presenter, after a question was asked, took his hands of the keyboard, folded his hands, turned to the questioner, and listened intently. Then he re-phrased the question and "added a twist"- to answer not only the question asked by also demonstrate a "cool" feature that was related to the question. What a great technique.

I noted in more than one instance, the tendency of presenters when a question is asked to turn away from the staff member and begin thinking how to demonstrate the feature. In diverting his attention from the staff member, I noted one presenter's voice inflection rather than increasing indicating a calm confidence decreased creating doubt. After awhile, you clearly gleaned that he

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wasn't focused on the staff member and that you weren't sure that his answer was honest.

Each presenter used some "key" phrases that were effective in turning a negative feature to a positive or anticipating and overcoming an objective before it was raised. Examples are:

1. "Most companies have some development to be done." (Statement acknowledges that your software is constantly evolving and that you may not have the feature just requested, the competitor's software is also probably missing a key feature.)

2. "We have XXX annual client conferences." (Statement invites their participation in the evolution of the product and provides them a known and scheduled forum to learn more about your software.)

3. "I will show you how to do that" or "Let's talk about that" (Statement clearly reflects that your software includes the feature requested and by immediately answering the question, the staff member gains confidence that you are not the magician pulling rabbits out of your hat.)

4. "Most of our clients are moving away from paper gift certificates to electronic gift cards." (Statement demonstrated leadership, tactfully suggested that the course's current policy will change and overcame the hidden objection that the vendor's software didn't account for the course's current policies regarding tracking on this item.)

5. Talking about a feature just demonstrated, the presenter humbly stated, "as far as I know, I believe that perhaps that feature is specific to our software." (Statement is a very tactful why of saying, "we are the only firm that has that feature that our competitors have yet to develop. I didn't realize how offensive any reference to a competitor was until I heard the following from presenters during the on line demonstrations: "We have replaced ABC three times so far during the current quarter." Both firms lose from such a statement.)

6. Other things said that were meaningful:

   a. "Bless you" when someone in the audience sneezed. Some presenters said nothing.

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b. Using "yes, sir or ma'am" when questioned.

c. When a question was asked in which the answer wasn't known, presenter stated, "I am going to find out and have an answer for you by tomorrow morning."

7. Other things done that made a positive impression:

   a. Receipt paper had course logo on it.

   b. When a request feature could not be demonstrated, the presenter stated, "That is a good idea. If selected we will have it in the next release. Let me make a note of that. We have had that request a few times recently. He then copied the request into his day timer."

   c. Make the demonstrations real. Pull out your driver's license to demonstrate driver's license scanning.

   d. Bring a PDA and do online demonstration of starter tee sheet.

   e. Bring gift cards with course logo already printed on them.

8. Other suggestions:

   a. Setting the time on your laptop to the local time of the golf course. A different time zone by one of the presenters was noticed.

   b. Preset your screen saver to over 60 minutes. It was distracting when it came on several times during the presentation as questions were being answered.

9. Statements made that could have been better expressed:

   a. Technical terms, we use a "VPN Portal with Session Keys."

   b. "Have totally lost track" where I was at.

   c. "My computer is moving ungodly slow."

   d. "I am doing it as fast as I can."

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e. "I will quickly show you this." (Take the time and do it correctly.)

f. "We are faking the internet on my laptop." (The wireless connection was operative, why did the Internet have to be faked?)

g. Asking what time is it and how much time remains in your presentation.

h. There is no way to quickly demonstrate that. (Why?)

10. If a Power Point Presentation is used for the demonstration, we would suggest:

    a. Fades/dissolves and entries should be eliminated entirely as it only slows the presentation.

    b. Display all elements on a screen simultaneously. Bringing in each point one at a time is too tedious.

    c. Amplify the points on the slide, don't merely read the bullet points.

    d. If a video is added to the presentation, have it highlight your software screens, your personnel, your offices with WORDS and not merely music. A generic video presentation on the dynamics of golf or the changing market is pointless.

    e. Use a hand held remote control to advance the Power Point presentation. Walking back and fore between computer and screen created a lot of needless physical energy in the room.

A calm measured approach flawlessly executed is in order. As a presenter you are on a stage, take control and the sales should come.

Conclusion

Because many golf courses only select a vendor once every five years, their staffs are not adapt at keeping abreast of which firms are providing the most comprehensive solutions, support and training. Even a carefully issued Request for Proposal will create more confusion than clarity in selecting the proper vendor.

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Thus, simplicity, brevity and clarity - three benchmarks that will serve you well.

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