

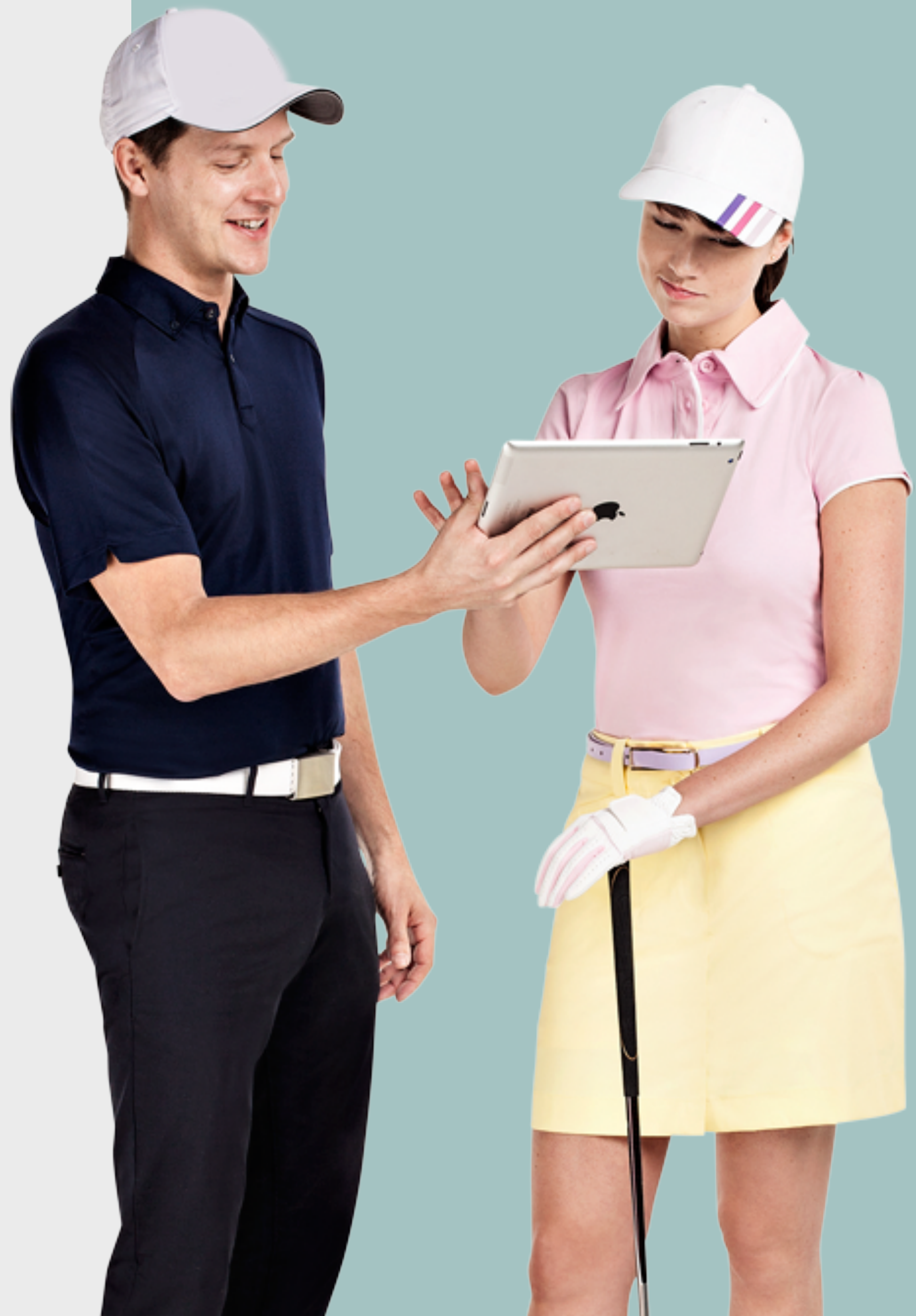
Assessments



ORBISgolf™

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Overview



What is an Assessment?

Assessments are a chargeable or free one to one session designed for you to develop a social connection with a student, learn more about their goals and direct them to the most suitable next step within the coaching journey. It should be marketed and delivered as an opportunity for students to meet the coach, discuss their golfing aspirations and then allow the coach to prescribe a suitable further opportunity within the coaching journey to help them achieve their goals. The main components of an Assessment includes...



Chargeable or Free

It is your choice to decide if the Assessment is offered free of charge or on a chargeable basis. It is vital that whichever option you chose the customer understands it is an opportunity to meet the coach, discuss their needs and not receive free coaching.



Private Basis

Assessments are offered on a private basis to clients. This is vital so that you can understand the needs of the customer and direct them to the most appropriate coaching opportunities.



Flexible Durations

It is up to you to decide on the durations of the Assessment you would like to offer depending on your needs and the further programming opportunities available. However, we recommend that Assessments should be a minimum of 30 minutes to allow enough time to build a strong relationship with the customer.



Flexible Locations

A vital component of an Assessment is discover prior to the session a background to the customer's needs and goals. This will help you to determine the appropriate settings for their Assessment such as on course or on the driving range.



Not a Lesson

It is important to distinguish between the role of an Assessment and a lesson. Assessments are not designed to be replacement for your regular lesson durations but an opportunity to connect with a new student, find out more about their goals and recommend them to program or coaching opportunity to suit their needs.

Purpose of a Assessment

Assessments play a vital role in activating and converting new students into further programming and activities at your club. The main purpose of an Assessment includes....



Engage New Students

- Assessments are designed to engage new students into your coaching programs. It provides you with an opportunity to capture new leads and then engage them at your facility before they embark on their coaching journey with you.



Find out their Goals

- During an Assessment you should aim to discover the goals and aspirations of the students. This will allow you to recommend to approaching coaching opportunities for them.



Form a Social Connection

- During an Assessment you can form a connection with the new student to help you to build trust and loyalty. You can learn more about them, their needs and aspirations to drive a connection in the long term.



Direct their Journey

- Once you have found out the aspirations of the student you can direct them to the next step on their coaching journey. This may include private coaching plans or the range of group coaching options. You can also guide them to further opportunities within the club environment.



Knockout Experience

- The Assessment is a chance to showcase your coaching and your facilities. You can expose students to how you can help their game and the technology and practice facilities available. It is also a chance to introduce them to the club environment driving footfall and membership growth for your venue.



Provide a Nugget

- Whilst the Assessment isn't designed to replace your regular lessons, you should ensure that you provide the student with some clear guidance on ways to improve their game and allow them to leave a nugget of information to help them improve and ultimately come back for more!

Output of an Assessment

Ultimately, Assessments are an opportunity to engage new students in your coaching programs and life at your facility. Therefore it sits as an activation program in Phase 2 of the coaching journey.

An Assessment will provide you with an opportunity to direct a new student to the right program for their needs and this may include any program within Phase 2 or 3...



3 Stages to the Assessment

The success of the Assessment is not just down delivering a great experience on the day. The communication and engagement you have with the student prior to and after the Assessment is vital to drive conversion into your coaching programs and give the student a knockout experience with your coaching business. The three stages will be covered in more detail later in the training module but it broadly includes...

1

Pre Assessment

Once you have captured a new lead you should proactively engage with the student on crucial information about their game as well as communicate information about the upcoming Assessment.

2

Assessment Delivery

This isn't just how you structure and deliver the Assessment itself but you need to ensure you are organized, meet and greet the student and provide the chance to communicate key information.

3

Post Assessment

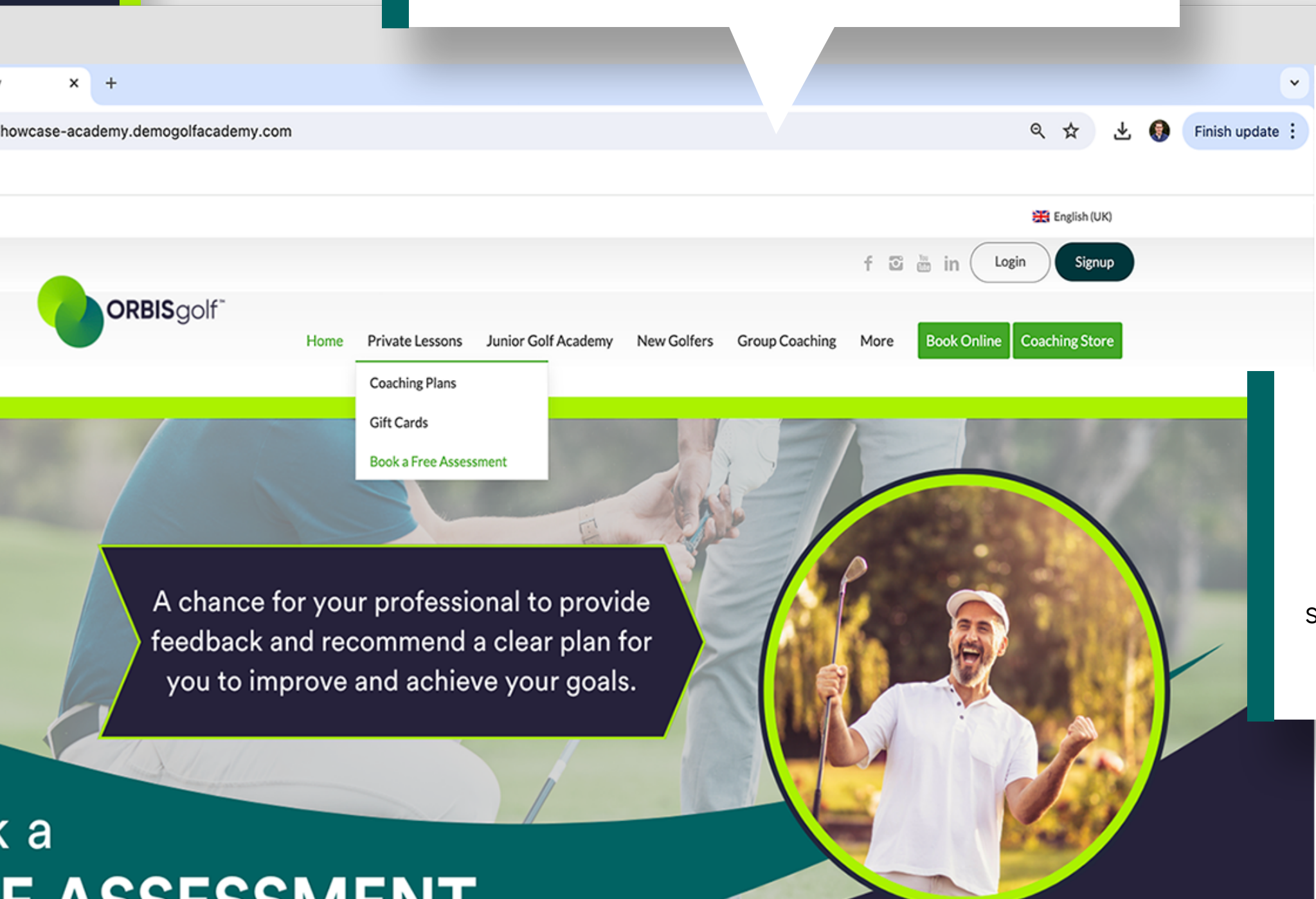
You should prioritise proactively following up with the student after the Assessment. This might be to gather feedback, communicate coaching program information or any specific information related to the Assessment content.

Capturing Leads into your Assessment

In order to deliver an Assessment, you of course need new students and the processes you put in place to capture leads is vital. This exact ways in which you do this will be specific to your coaching business however we recommend that you put in place some of the following ideas based on the success of the program in clients around the world that we have worked with...

Capture Via Web Page and Forms

If you have a business website, you should capture leads through specific web pages and contact forms. This will allow you to showcase the Assessment information and capture crucial information.



A chance for your professional to provide feedback and recommend a clear plan for you to improve and achieve your goals.



Marketing Campaigns

You should market your Assessments through digital campaigns and in house marketing materials. You can utilise the resources in our marketing toolbox to do this!

Claim a FREE Assessment with... 

Demo Coach
PGA Professional

demo@demoacademy.com
01234 567891

"Demo has helped my gain enormously. I started with an assessment to help me understand ways in improve."

"In 6 months I have reduced my handicap by 3 shots. Highly recommended"

Demo Member, Demo Golf Club


SCAN ME

To Book a Free Assessment Lesson please email: info@demogolfacademy.co.uk

Demo Golf Club, Demo Street, Demo City 01923 9433462
https://www.demogolfacademy.golfconnect.com

Word of Mouth

Of course their is no better tool to capture new leads than word of mouth. You should clearly outline the role of an Assessment to your students and on site staff to drive word of mouth referrals.

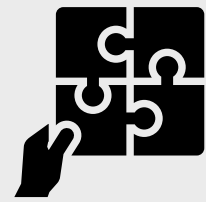


Delivering an Assessment



Scheduling Overview

The exact way in which you operate your Assessments will be up to you. However, there are some crucial scheduling actions and recommendations you should take to make this program a success within your coaching business and this includes...



Decide on the Duration

- It is up to you to decide on the durations of Assessment you would like to offer depending on your needs and the further programming opportunities available. However, we recommend that Assessments should be a minimum of 30 minutes to allow enough time to build a strong relationship with the customer.



Customize your Booking / Reminder Emails

- Via GLF. Connect, you have the ability to customise your Booking Confirmations and Reminders linked to your Assessments. You can use this to include important information such as the pre-Assessment profile questions.



Decide on Student or Coach Led Booking

- You should decide if you would like to generate leads into your Assessment and handle the booking process yourself or allow students to book their Assessments directly. You can customise how this is setup within GLF. Connect.



Decide on Pricing

- We recommend that you offer Assessment free of charge, however you may decide you would like to charge for them and you should ensure this is setup accurately on your GLF. Connect system.



Ensure All Booking is Via GLF. Connect

- Regardless as to whether the booking process is led by you or the student, we recommend all Assessments are booked into the GLF. Connect system. This will drive the customer experience, ensure you collect vital student data and allow you track key insights.

Access Support Via the Coaches Toolbox

Through the Coaches Toolbox on the GLF. Connect system, you can access a variety of support resources that are specifically tailored to the Assessments. We recommend you utilise the resources for each step of implementation...

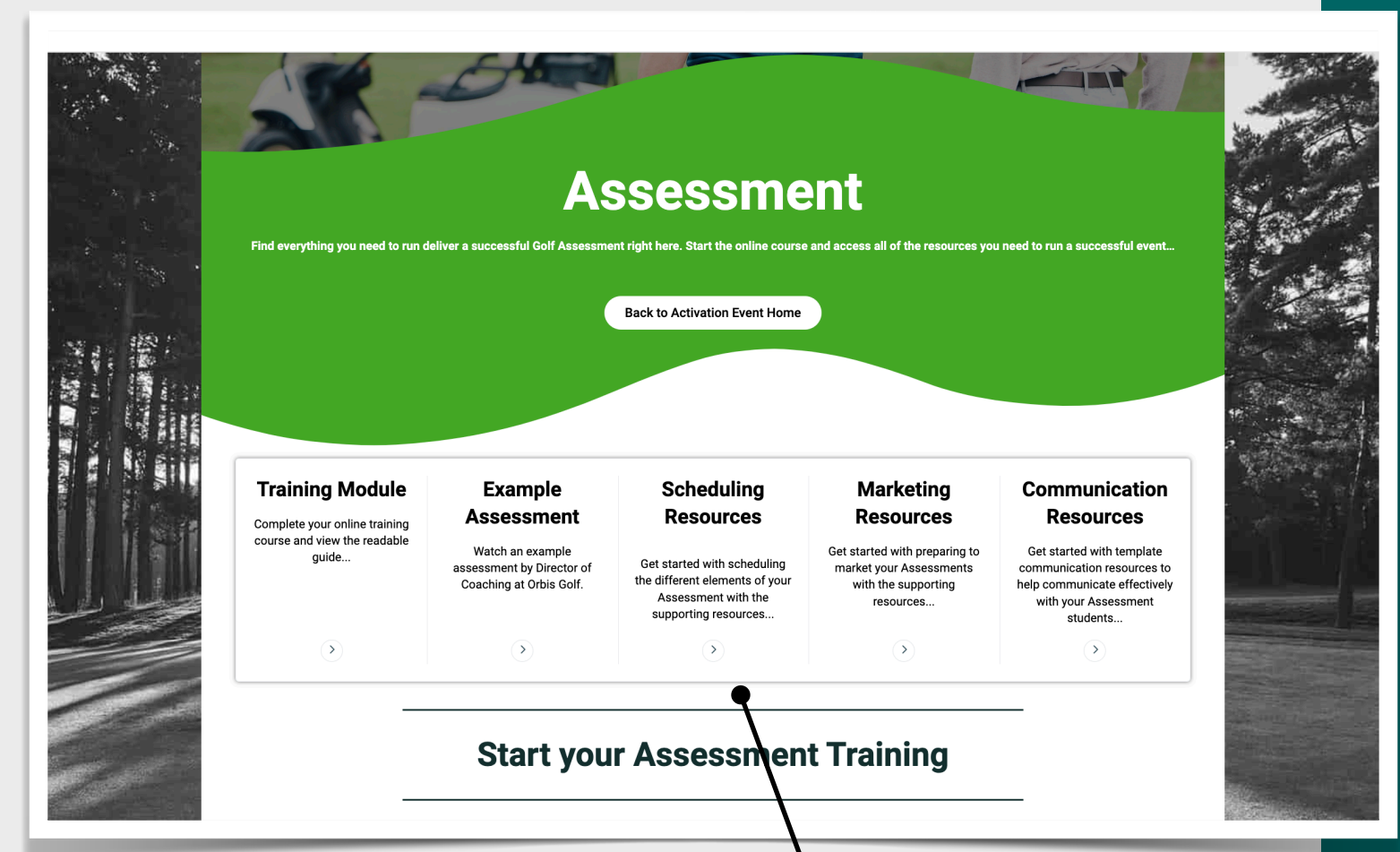
1 Select the Activation Event option from the Adult Academy page:



2 Select Assessments on the Selection Page...

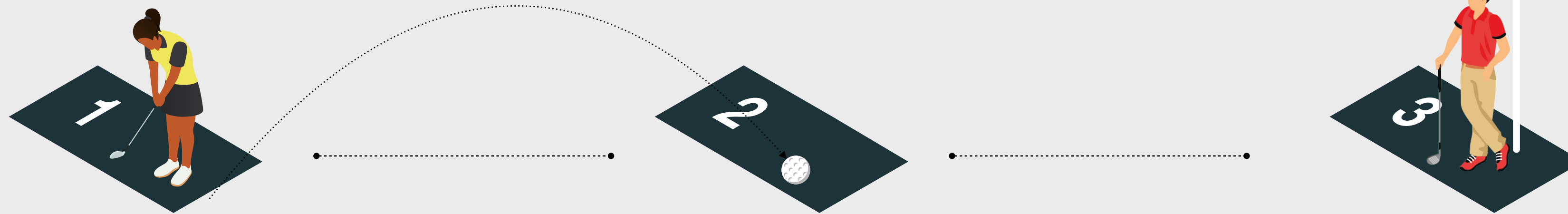


3 Access the supporting resources...



Prior to an Assessment

It is vital that you are organized for your Assessment and there are a number of actions we recommend you take after you receive a new Assessment lead or booking. This will drive the experience of the students within your coaching business and ensure you have important information prior to delivering the Assessment. This includes the following...



Quick Response to an Enquiry

If you receive an enquiry for an Assessment you should respond as quickly as possible.

This will help to drive a professional experience and ultimately capitalise on the engagement of the student.

You should then book the student into your schedule on GLF. Connect and this will automatically trigger a Booking Confirmation.

Send Pre-Assessment Profile Questions

In preparation for the Assessment you should ask the student to provide you with a brief overview of their golfing experience and take the time to answer three simple questions:

1. *What do you want to achieve with your golf?*
2. *When do you want to achieve this by?*
3. *What would it mean to you to achieve this?*

This should be sent back by the student ideally 24 hours before your Assessment date.

Appointment Reminder

Your GLF. Connect system will automatically send a Booking Reminder to your student with key information but you can also follow with a short personalised email or message via the GLF. Connect App or GLF. Connect web based system.

Scheduling via GLF. Connect

All Assessments should be scheduled and bookings processed through your GLF. Connect system. An Assessment program booking filter has been created for you on your system and the GLF. Connect Support Team has built a range of training material to help you get this setup correctly scheduled correctly...

Further training is available from the GLF. Connect support team to help you learn how to setup the Assessment booking filter and how to book an Assessment within the Scheduling section on the Coaches Toolbox Assessment page.

Assessments are categorised under the Assessment Program filter with the various durations options available which can be customised for each coach.

The screenshot shows the 'CHOOSE YOUR PROGRAM' section of the ORBISgolf interface. It features a 'FREE' icon and a 'Schedule' button. Below this, there are options for 'Assessments' and 'Junior Private Lessons'. A dropdown menu for 'CHOOSE PROGRAM' is open, showing options for 30 Mins, 45 Mins, 60 Mins (selected), and 90 Mins. Below the dropdown, three PGA Professionals are listed: Mike Fields, Amy Stevenson, and Andrew Evans.

The screenshot shows the 'Scheduling Resources' page. It includes a header 'Scheduling Resources' and a sub-header 'Get started with scheduling the different elements of your Assessment with the support videos below built from the GLF. Connect Support Team!'. A list of five training videos is provided, each with a 'Watch' button:

- Customizing your Email Templates
- Assessment Filter Private View Setting
- Activating your Assessment Duration
- Setting your Assessment Price
- Generating a Short Link

Structure of an Assessment

Delivering an assessment effectively is essential to achieving a successful experience for the student and ultimately conversion into further programming with you at your club. We have provided below some of the crucial elements of an assessments delivered over a recommend 30 minute duration...

25-30 Mins

Re-Book and Provide Feedback

Finalise the assessment by getting the next session booked and if signing up to a coaching plan this should be the On Course Discovery session. You should be prepared to deal with any objections and be flexible with your recommendations to suit their needs.

Crucially, provide lesson feedback after the assessment via GLF. Connect and spent this time educating the student about it's importance and ensure they have GLF. Connect access.

20 - 25 Mins

Recommend a Plan

During the later stage of the assessment discuss the lesson programs you offer including the options, payment structure and make a confident recommendation.

Outline the plan of how the time will be spent within that recommendation.

0-10 Mins

Build a Relationship

At the start of the assessment provide a friendly welcome. Begin with an informal discussion covering the following points:

- Confirm and find out WHY they have booked the assessment
- Find out who they play with
- Find out about scoring ability
- Listen to main points of feedback about their game
- Find out about previous lesson experience
- Check suitability of equipment
- Find out what their motivators are
- Review any information from the pre-assessment questions

10 - 20 Mins

Gain their Trust

After the initial discussion is complete observe them hitting some shots in the chosen practice environment and ask further questions. Determine their knowledge of their own game and any tips or thoughts they have that may prohibit improvement. Confirm that what you are observing is what happens on the course.

You should built trust by confirming that you will help them achieve their goals and build their confidence in your abilities by telling them about your coaching style.

During this time provide them with an small intervention that will help their game and allow them to feel they have left the session with information that they can act on to improve.

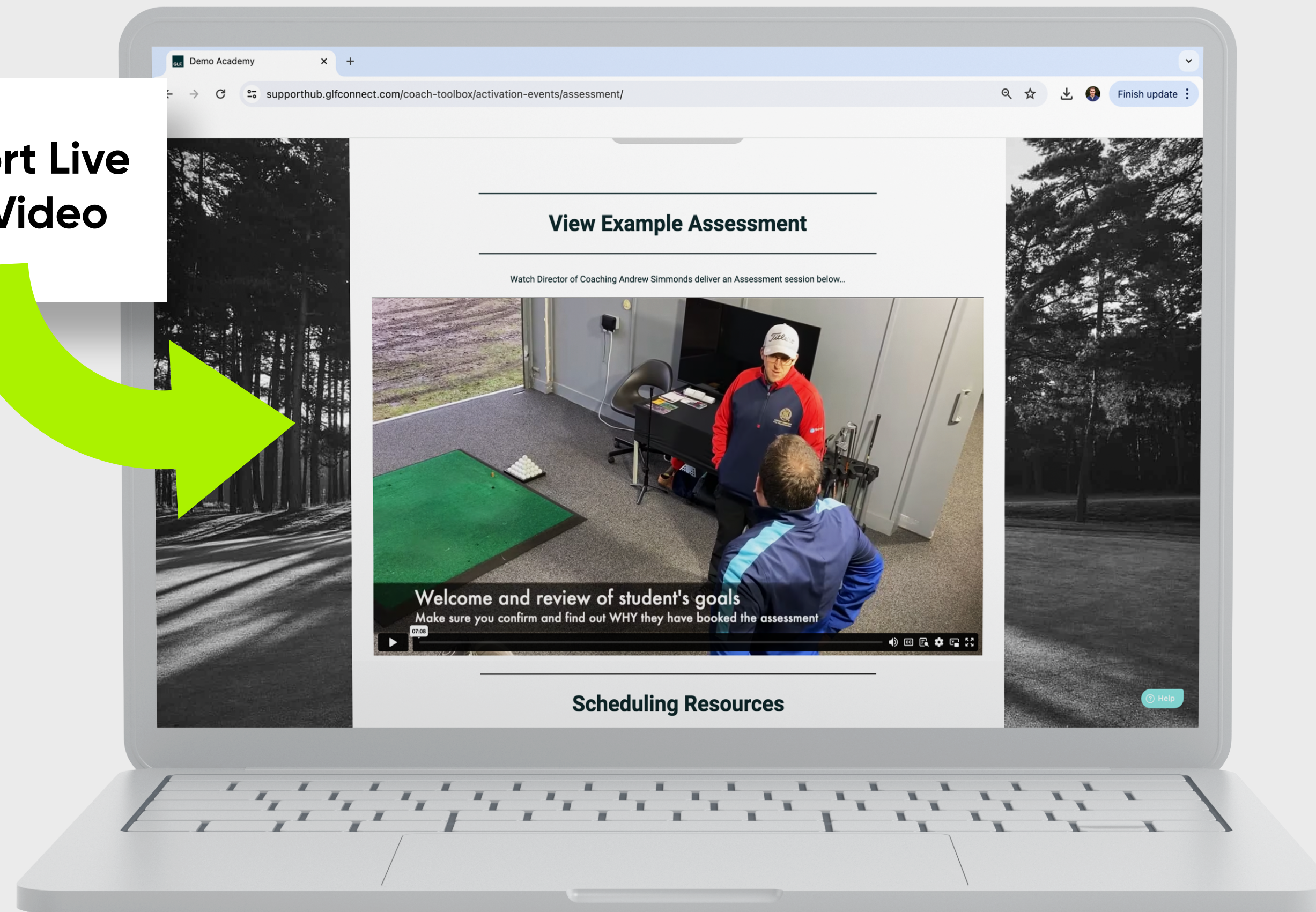


Example Assessment

Via the Assessment page on the Coaches Toolbox you can view an example Assessment conducted by Andrew Simmonds, the Director of Coaching at Orbis Golf. This short 6-minute video will show you an example of how to effectively structure each step of the assessment as outlined previously...



View the Short Live Assessment Video



At the End of the Assessment

A successful Assessment doesn't just end with delivering the assessment itself. Providing post assessment communication is vital and this will help you to gather feedback, communicate coaching program information or share any specific information related to the Assessment content. We recommend that after the assessment you prioritise the following...

Updated Campaign Data and Profile Information

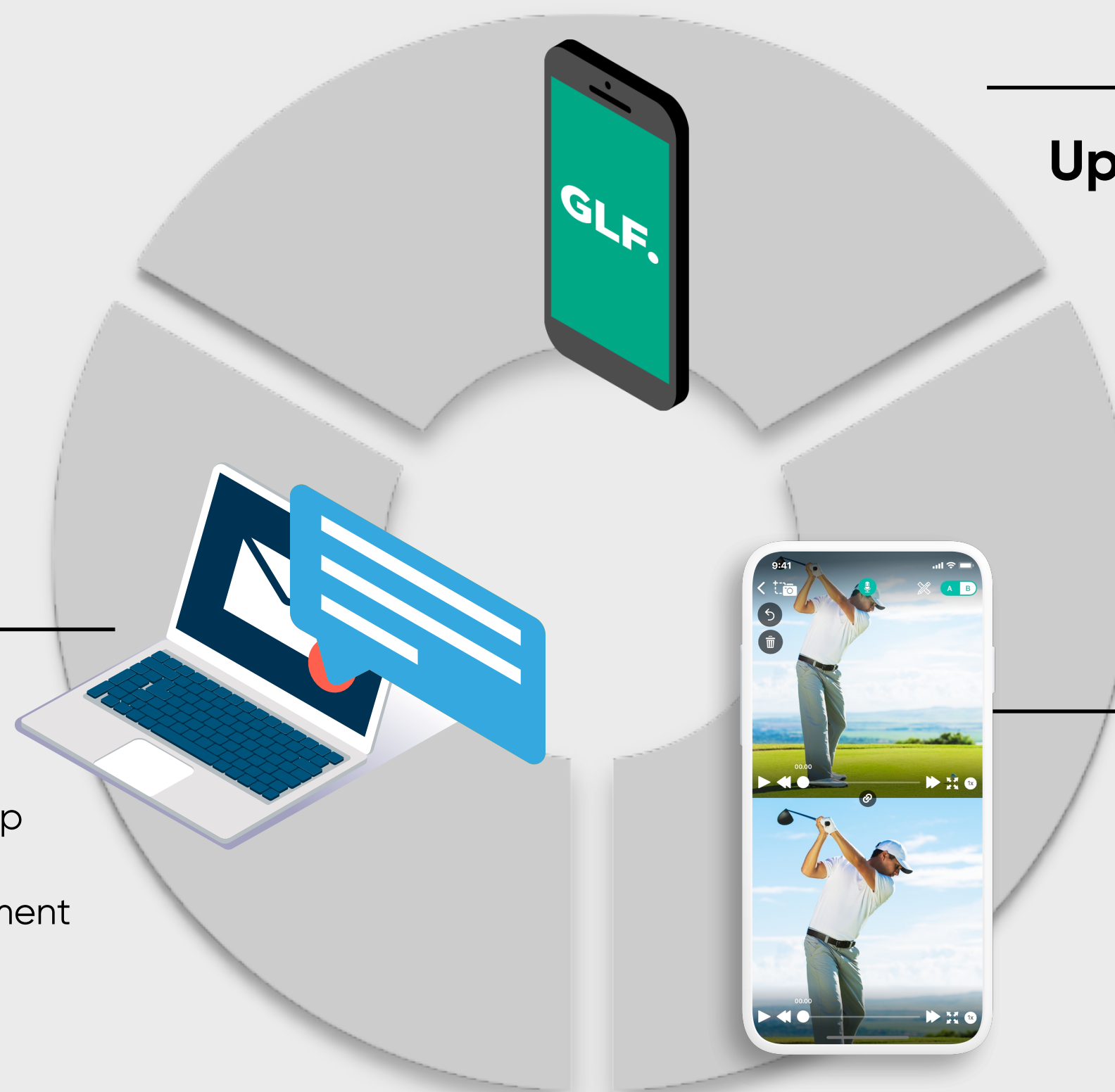
You should ensure that your student is added to any digital campaigns that are sent out on a regular basis as well as make notes in the students profile on GLF. Connect so you can review this at a later date.

Post Assessment Communication

A day or two after the assessment you should follow up with the student on the phone or via email. You can communicate the learning outcomes from the assessment and make a recommendation to a further coaching program such as a Private Coaching Plan as well as ensuring the next engagement is booked in.

Recording and Sharing Progress on GLF.Connect

To record the students learning outcomes from the Assessment the GLF.Connect Media feature can be used. You can share lesson notes, images and videos directly to the student.

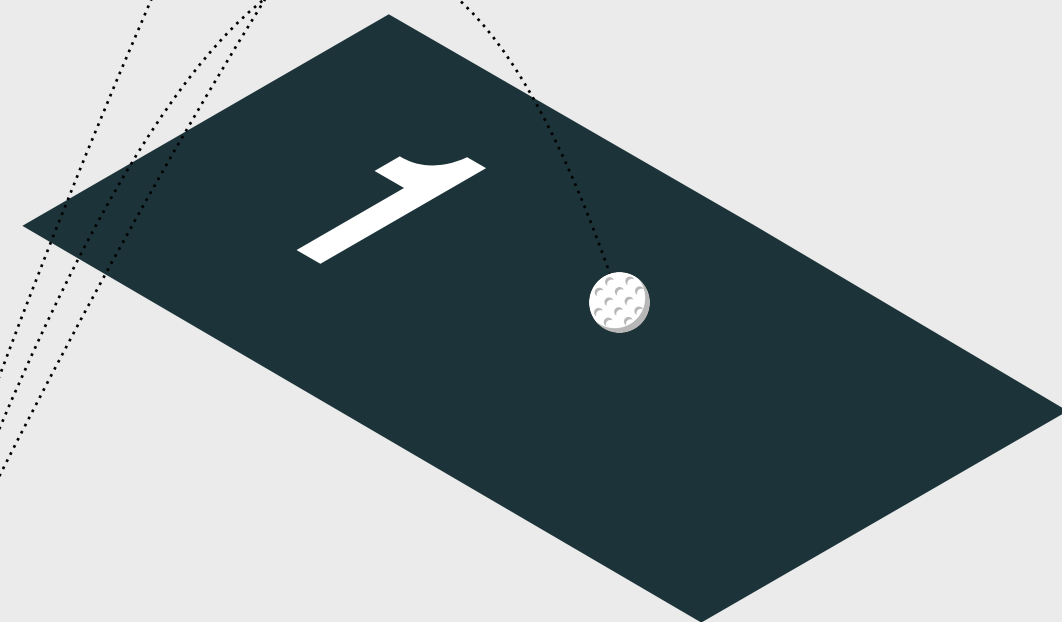
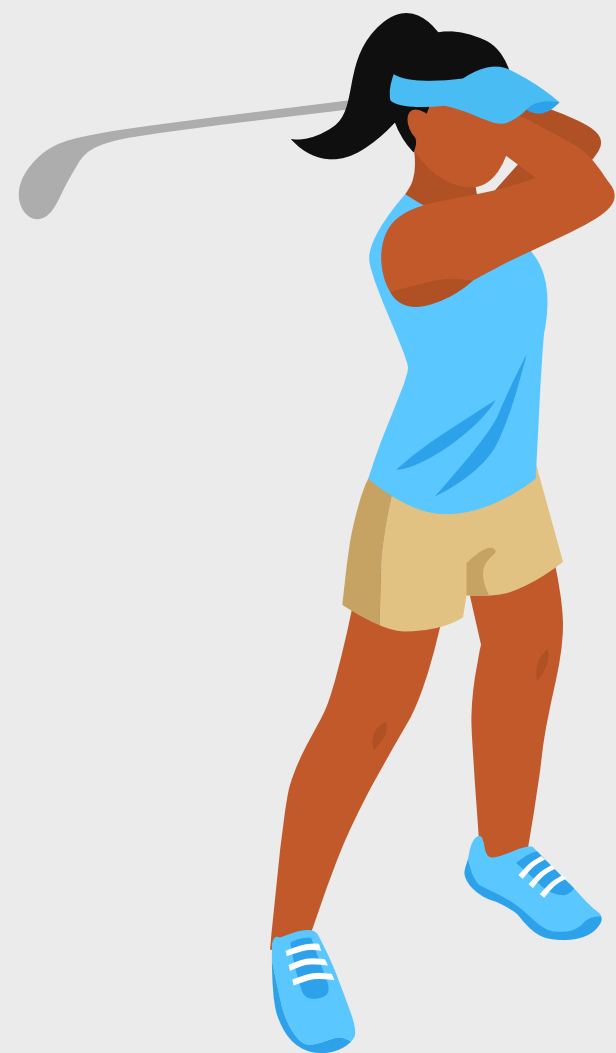


Next Steps



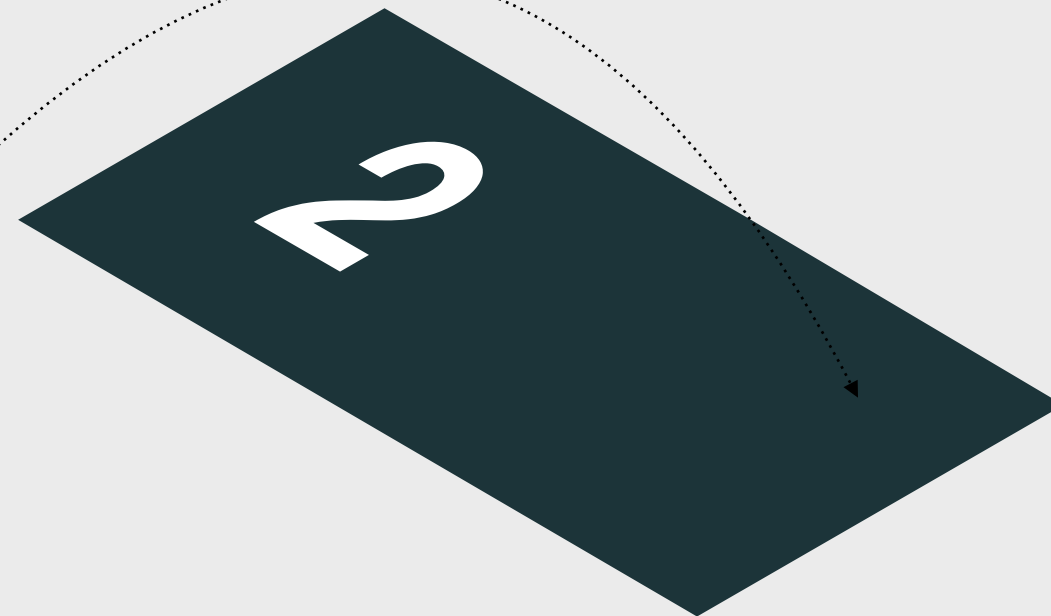
Next Steps

Take the next steps towards a launching Assessments by following the recommend next steps below...



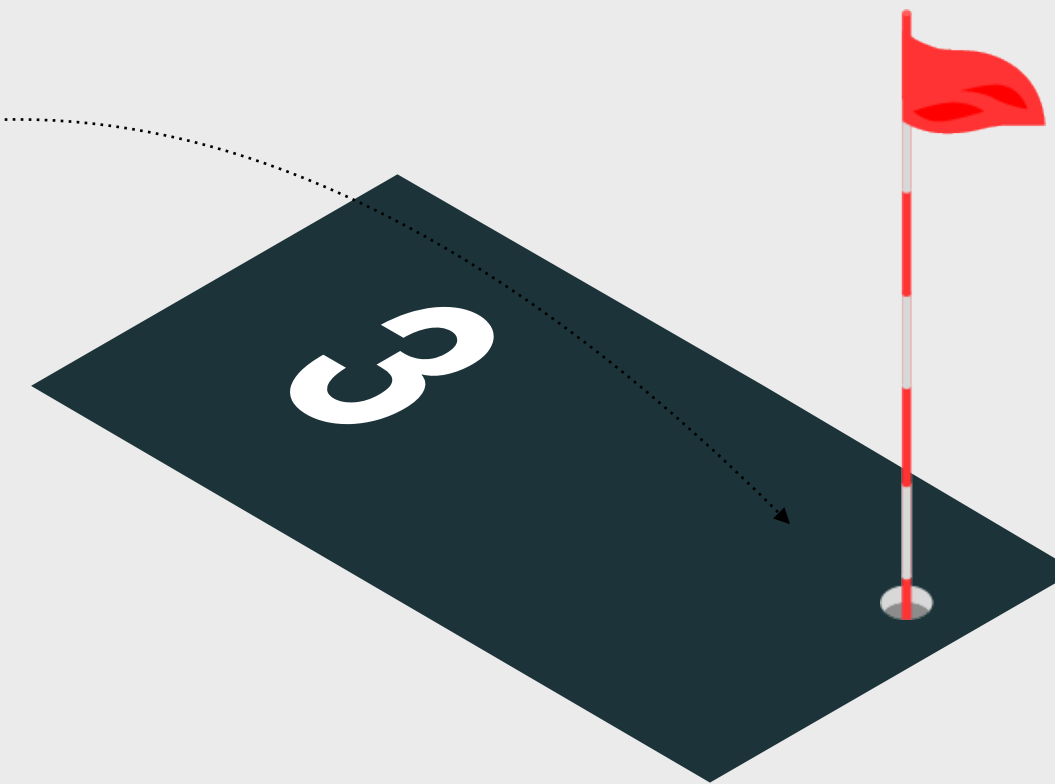
1. Decide on the Assessment Duration

- Decide on the duration of the Assessment you would like to offer and ensure your Assessment booking filter and duration is activated on your GLF. Connect system along with the correct pricing.



2. Create Your Marketing Content

- Create your marketing content including the flyers for your in house and digital campaigns and make any edits to your business website.



3. Complete your Pre-Assessment Actions

- As and when you generate Assessment leads you should complete the most important pre-Assessment actions including booking the student into GLF. And send the pre-assessment communication.

Thank you.

Please review the **Scheduling Resources** within the **Assessments** page of the **Coaches Toolbox**.