

01 · PROGRAMME BRIEF

Start with the business objective, not the tee time.

Use this worksheet to decide where golf can move a relationship forward, select the right guests and connect every activity to a deliberate next step. Type directly into the fields, then print or save your completed copy.

COMPANY

PROGRAMME OWNER

PLANNING PERIOD

EXECUTIVE SPONSOR

PRIMARY PROGRAMME OBJECTIVES

- ☐ Win a new client
- ☐ Expand an existing account
- ☐ Strengthen executive relationships
- ☐ Accelerate a live opportunity
- ☐ Re-engage a dormant account
- ☐ Reward advocacy or partnership

TOTAL ANNUAL INVESTMENT

CONCIERGE FEE

DEPLOYABLE PROGRAMME FUND

£

£20,000

£

INITIAL PROGRAMME FUND ALLOCATION

USE	PURPOSE	TARGET ALLOCATION	OWNER
Client golf days		£ / %	
Large events (20+)		£ / %	
Teams & leadership		£ / %	
Inclusive pathways		£ / %	
Merchandise & gifting		£ / %	

HOSPITALITY, GIFTING OR BUDGET GUARDRAILS

WHAT MUST BE TRUE IN 12 MONTHS FOR THIS PROGRAMME TO BE SUCCESSFUL?

02 · ACCOUNT PORTFOLIO

Who earns a place in the programme?

Prioritise accounts where access, time and the right shared experience can unlock a meaningful next step.

#	ACCOUNT	RELATIONSHIP	COMMERCIAL PRIORITY	KEY PEOPLE	NEXT MOVE
01					
02					
03					
04					
05					
06					
07					
08					
09					
10					

Relationship: New / Developing / Established / At risk Priority: Win / Grow / Retain / Re-engage

Do not invite by seniority alone. Invite the people whose trust, perspective or involvement can move the account forward.

03 · ACCOUNT PORTFOLIO

Build depth beyond the obvious accounts.

Use the second half of the portfolio to create a balanced pipeline across immediate opportunities, strategic relationships and long-term potential.

#	ACCOUNT	RELATIONSHIP	COMMERCIAL PRIORITY	KEY PEOPLE	NEXT MOVE
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					

Portfolio check: Are you over-investing in comfortable relationships? **Coverage check:** Is every account owned by a named person?

Review the Top 20 quarterly. Move accounts in or out when the commercial rationale changes.

04 · PLAN ONE PURPOSEFUL EXPERIENCE

Define the next move before selecting the format.

PRIORITY ACCOUNT

INTERNAL OWNER

TARGET WINDOW

RELATIONSHIP OBJECTIVE

What should be different after this experience?

COMMERCIAL CONTEXT

Opportunity, renewal, expansion or strategic issue

RIGHT PEOPLE

Hosts, guests, roles and relationship dynamics

RIGHT FORMAT

Championship, Flagship, large event or another format, and why

GUEST EXPERIENCE

Golf confidence, accessibility, dietary, travel or gifting needs

COMPLIANCE CHECK

Hospitality limits, approvals, conflicts or gifting policy

CONVERSATION PLAN

What do we need to learn, understand or agree while we have quality time together?

NEXT COMMERCIAL ACTION

OWNER

DUE DATE