LEADERSHIP IMMERSION FOR EXCELLENCE

Sales Support Immersion Guide

LIFE
LEADERSHIP FOUNDATIONS
Your Leadership Journey Starts Here

WELCOME

This document is the step-by-step procedure and worksheet for completing a LIFE department immersion from start to finish: planning, approvals, execution, reflection, and completion credit.

Participants use it to schedule and complete an on-the-clock immersion, follow the on-the-job training checklist to observe/practice key tasks, and confirm competency.

It also guides a leadership-focused reflection conversation with the department leader and provides the final verification fields needed to submit the completed form to Learning & Development.

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WESTGATE RESORTS
LEARNING & DEVELOPMENT

LIFE Immersion Procedure

Planning & Approvals

- **LIFE Participant:** Select **five (5)** departments to complete immersions.
- **Learning & Development Manager:** Coordinate with departments and provide the **Immersion Training Point of Contact (POC)** for each immersion.
- **LIFE Participant**: Email the **Immersion Training POC** to request an immersion date/time and **tentatively schedule** the session(s).
  - Immersions are typically **½ day to full day**, and time may be **split across multiple sessions/days** as needed.
- **Immersion Training POC:** Align the participant with an appropriate trainer/leader and confirm logistics for the session(s).
- **LIFE Participant:** Obtain **manager written approval via email** before finalizing/attending (include department, date/time, estimated duration, and note it is **on the clock**).
- **Manager:** Reply with written approval (required).

Immersion Execution

- **LIFE Participant:** Complete the immersion **on the clock** (paid working time).
- **Trainer/Leader (CFT, Supervisor, Manager, or Department Head):** Train/shadow the participant using the **on-the-job training checklist** and learning objectives.
- **LIFE Participant:** Follow the checklist and demonstrate understanding.

Reflection & Completion

- **LIFE Participant:** Schedule a reflection discussion with the **Department Head** or **Department Manager** (during the immersion, immediately after, or on a separate day).
- **Department Head / Manager:** Review the reflection questions with the participant and discuss key takeaways.
- **LIFE Participant:** Complete the immersion form and submit it to the **Learning & Development Manager** to receive completion credit.

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Sales Support OJT Checklist

All checklist items should be trained on, observed, and practiced (where appropriate and as time allows).

- [ ] Observed the end-to-end workflow for a sales tour or appointment, from lead or tour generation through check-in, assignment to a sales representative, and post-tour processing, noting which steps are owned by Sales Support versus the sales team.

- [ ] Explained how Sales Support manages scheduling, rotation, and capacity (e.g., tour flow, breaks, rotations, no-shows, re-books) to support fair allocation of tours and a smooth experience for guests and sales representatives.

- [ ] Reviewed how Sales Support handles documentation and compliance requirements related to contracts and closings (e.g., forms, signatures, IDs, disclosures), including how they verify completeness and escalate discrepancies or red flags.

- [ ] Observed how Sales Support coordinates with other departments (Front Desk, Contact Center, Transportation, Marketing/OPC, Gifting, Finance) to ensure guests are in the right place at the right time and that all non-sales touchpoints (transport, gifting, refreshments, room usage) are delivered as planned.

- [ ] Discussed how Sales Support uses systems and data (e.g., CRM, tour tracking tools, reporting dashboards) to monitor volume, show rates, close rates, and other key metrics—and how timely, accurate data entry supports decision-making and overall sales performance.

- [ ] Supported a live Sales Support activity (as appropriate) by assisting with at least one of the following: check-in/verification, rotation assignment support, rebook/no-show handling, document packet prep/quality check, tour status updates in the system, or coordination with a partner department—and identified at least one quality checkpoint that prevents guest friction or downstream closing issues.

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Leadership Reflection Questions

Please answer the questions below based on your OJT and meeting with the department head or manager.

Department Role & Goals

In your own words, what are the main goals and day-to-day responsibilities of the Sales Support team within our timeshare sales operation?

How does a Sales Support leader translate those goals into clear priorities and daily execution (tour flow, fairness in rotation, compliance, guest experience), especially when volume shifts unexpectedly?

Impact on Guest Experience

How does Sales Support directly and indirectly impact the experience of guests, sales representatives, and leaders, and ultimately the overall guest/Owner experience?

What leadership behaviors help ensure Sales Support delivers a consistent guest-ready experience (clear service standards, calm communication, rapid issue resolution) even during peak volume and last-minute changes?

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Peak Times & Challenges

What are the busiest times of day, week, or season for Sales Support, and what common challenges show up during those periods (e.g., overbooking, no-shows, last-minute changes)?

What does a strong Sales Support leader do during peak periods to reduce bottlenecks and protect tour start times (capacity planning, staffing, escalation paths, proactive communication)?

Measures of Success

What metrics or measures (e.g., tour show rates, on-time starts, documentation accuracy, data entry timeliness) are used to define success for Sales Support, and why do they matter?

How does a leader use these measures to coach performance and improve operations (daily huddles, trend review, root-cause follow-up) rather than treating them as reporting only?

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Cross-Department Collaboration

Which departments does Sales Support interact with most frequently (e.g., Sales, Marketing/OPC, Front Desk, Transportation, Gifting, Finance), and how does effective collaboration help deliver a better guest and Team Member experience?

How does a Sales Support leader set shared expectations with partner leaders (timelines, handoffs, service recovery, communication cadence) so guests stay on track and teams stay aligned?

Example of Great Collaboration or Service

Describe an example you observed or heard about where cross-department collaboration or Sales Support went especially well. What made it successful?

What leadership behaviors contributed to the success (pre-alignment, clear ownership, empowerment, follow-up), and how could those behaviors be replicated consistently?

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Handling Needs & Issues

How does Sales Support typically handle issues such as late arrivals, overbooked tours, missing paperwork, or system downtime, and what did you notice about how they communicate during these situations?

When escalation is needed, how does a leader decide what to prioritize (guest impact, compliance risk, revenue risk), how to allocate resources, and how to maintain clear communication with Sales, OPC/Marketing, and resort leadership?

Opportunities to Improve

If you could recommend one process or practice to improve efficiency, accuracy, or support within Sales Support, what would it be and why?

What role should the Sales Support leader play in evaluating the idea, removing barriers, and implementing it in a way that sticks (process clarity, training, reinforcement, measurement)?

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Skills for Success

Based on your immersion, what skills or qualities make someone especially successful working in Sales Support?

Which of those skills are most influenced by leadership (hiring, training, coaching, culture), and how does a leader develop them across the team?

Service Standards & Consistency

What service standards or behaviors seem most important for Sales Support to deliver consistently (professional check-in, clarity, confidentiality, speed, calm under pressure)?

How does a leader reinforce these standards day-to-day (huddles, observation/coaching, scripts/job aids, recognition, corrective action) to maintain a consistent experience across shifts?

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Compliance, Documentation Quality, & Risk Controls

1. What documentation or compliance controls are most critical in Sales Support (IDs, disclosures, signatures, required forms, audit readiness), and where do errors most commonly occur?

How does a leader ensure the team stays compliant and confident in these controls during peak volume and urgent requests (checklists, quality checks, escalation triggers, training refreshers)?

Data Integrity & Systems Discipline

1. What system/data entry practices are most important for Sales Support (timely tour status updates, accurate dispositioning, documentation tracking), and how do they affect sales performance and leadership decision-making?

How does a leader maintain systems discipline (standards, audits, coaching, consequences) while still keeping the team guest-facing and efficient during high volume?

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Training Verification

Please fill out the information below and submit the entire document back to your Learning & Development Program Manager.

Training Confirmation:

Please submit the name(s) of the trainers that facilitated your immersion along with their job title. (i.e. John Reinaldo, Sales Manager).