

LEADERSHIP IMMERSION FOR EXCELLENCE

Sourcing Immersion Guide



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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Purchasing 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 purchase, from initial request or forecast (requisition) through vendor selection, purchase order creation, and confirmation, including how specifications, quantities, and delivery locations (resorts, warehouses) are validated.
- Explained how buyers evaluate and work with vendors (pricing, quality standards, service levels, contract terms) and how preferred or approved vendors are selected and maintained for key categories (e.g., F&B, housekeeping supplies, engineering parts, retail).
- Observed how Sourcing coordinates with Logistics, Warehouse/Distribution, and resort Operations to plan deliveries, manage lead times, and resolve issues such as backorders, substitutions, or urgent/emergency needs.
- Discussed how Sourcing responds when there are product quality issues, vendor performance problems, or supply disruptions, including how issues are documented, escalated, and communicated back to resorts and other stakeholders.
- Explained how Sourcing uses data and metrics (e.g., cost savings, on-time delivery, fill rates, inventory levels, contract compliance) to make decisions and support both operational efficiency and a consistent guest experience across resorts.
- Supported a live sourcing/purchasing activity (as appropriate) by assisting with at least one of the following: reviewing a requisition for completeness, confirming specs/quantities/locations, validating a vendor selection rationale, or walking through a PO creation/approval step—and identified at least one risk or quality checkpoint that prevents downstream issues for resorts.

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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 Sourcing team at Westgate Resorts?

How does a Sourcing leader translate those goals into clear priorities, accountability, and daily execution (workload triage, stakeholder expectations, vendor standards, and urgency management)?

Impact on Guest Experience

How does the Sourcing department directly and indirectly impact resort operations and the overall guest experience?

How does a Sourcing leader influence consistency and service levels for the resorts (clear communication, fulfillment expectations, alternatives planning, and issue recovery) during both routine and high-stress situations?

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Peak Times & Challenges

What are the busiest times of year or typical “crunch periods” for Sourcing (e.g., openings, high season, large projects), and what common challenges show up during those periods?

What does a strong Sourcing leader do differently during peak periods to reduce bottlenecks and protect resort readiness (prioritization rules, escalation paths, vendor coordination, and stakeholder updates)?

Measures of Success

What metrics or measures (e.g., cost savings, on-time delivery, fill rates, contract compliance, quality issues) are used to define success for the Sourcing team, and why do they matter?

How does a leader use these measures to coach performance, recognize wins, and make operational adjustments (rather than treating metrics as “reporting only”)?

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Cross-Department Collaboration

Which departments does Sourcing interact with most frequently (e.g., F&B, Housekeeping, Engineering, Finance, Logistics), and how does effective collaboration with those teams help deliver a better guest and Team Member experience?

How does a Sourcing leader set shared expectations with other leaders (timelines, specifications, substitutions, guest-facing impact, and communication cadence) to ensure a consistent resort experience?

Example of Great Collaboration or Service

Describe an example you observed or heard about where cross-department collaboration or Sourcing 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 Guest Issues

How does Sourcing typically handle issues such as late deliveries, out-of-stock items, or product quality concerns, and what did you notice about how they communicate during escalated situations?

When escalation is needed, how does a leader decide what to authorize or prioritize (expedites, substitutions, alternate sourcing, partial fulfillment), how to support the team, and how to ensure stakeholders receive a consistent and professional resolution?

Opportunities to Improve

If you could recommend one process or practice to improve efficiency or support for resorts within Sourcing, what would it be and why?

What role should the Sourcing 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 Sourcing?

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 Sourcing to deliver consistently (responsiveness, clarity on timelines, documentation quality, substitution communication, stakeholder follow-through)?

How does a Sourcing leader reinforce these standards day-to-day (work intake norms, quality checks, coaching, recognition, corrective action) to maintain consistency across resorts and categories?

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Safety, Security, & Risk Awareness

What compliance, policy, or risk controls are most critical in Sourcing (approved vendors, contract compliance, segregation of duties, pricing controls, documentation standards)?

How does a leader ensure the team stays compliant and confident in these controls during peak business and urgent requests?

Incident Response & Escalation

If a major supply disruption or urgent need occurs (e.g., vendor outage, critical part shortage, emergency resort request), what is the typical escalation path and expected communication flow?

How does a Sourcing leader coordinate with Logistics, resort leadership, and other stakeholders to make timely decisions, document appropriately, and protect resort operations and the guest experience?

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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, Senior Buyer).