



10-PROMPT STARTER PACK








Country Club Finance AI Prompts

From the HFTP Presentation

"From Spreadsheets to Smart Prompts"

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How to Use This Progressive Toolkit

- 1** Select your comfort level, then advance when ready:
 -  **BEGINNER** - Build confidence with simple, quick wins
 -  **INTERMEDIATE** - More detailed analysis when you're comfortable
 -  **ADVANCED** - Sophisticated insights for power users
- 2** Consider the 4 Pillars of your framework. (See page 6 for examples.)
 -  **PERSONA** - Give AI a specific role
 -  **PURPOSE** - Define the task clearly
 -  **PARAMETERS** - Specify format & constraints
 -  **PROCESS** - Guide the thinking steps
- 3** Go to your comfort level section and follow these Instructions:
 1. Copy the prompt template
 2. Replace [bracketed items] with your specific details
 3. Attach relevant reports from your club management software
 4. Paste into ChatGPT, Claude, or your preferred AI platform
 5. Refine based on the initial response

BEGINNER LEVEL

Perfect for getting started - simple and confidence-building

1. Quick P&L Review

★ Great first prompt to try

Act as a financial analyst. Review this P&L statement and tell me the 3 most important things I should discuss with my General Manager.

Attached report: [Upload your monthly P&L statement]

2. Budget Variance Spotter

★ Simple Variance identification

You are my financial controller. Look at this budget vs. actual report and highlight anything that looks unusual or concerning.

Attached report: [Upload your budget vs. actual report]

Focus on: Variances over \$[amount] or [%]

3. Member-Friendly Explanation

★ Great for communication practice

Act as a club communications expert. Explain our current financial situation in simple terms that I could share with members or board members who aren't financial experts.

Attached report: [Upload your monthly financial summary]

4. Quick Cost Check

★ Fast operational insights

You are a club operations consultant. Based on this report, what's the one cost area I should focus on reducing this month?

Attached report: [Upload your departmental expense report]

● INTERMEDIATE LEVEL

When you're comfortable with basics and want more depth

5. Comprehensive Variance Analysis

Act as a country club financial analyst with 15 years of experience. Analyze our monthly performance and provide insights.

Attached report: [Upload your monthly P&L with budget vs. actual]

Please provide:

- Top 3 favorable and unfavorable variances (amount and % of budget)
- Likely causes for each significant variance
- Recommended actions for unfavorable variances
- Executive summary suitable for board presentation

Focus on variances greater than \$5,000 or 10% of budget.

6. F&B Optimization Analysis

You are a restaurant operations expert specializing in club F&B. Help me improve our food & beverage profitability.

Attached report: [Upload your F&B departmental P&L]

Additional context:

- Covers served this month: [number]
- Special events/circumstances: [describe any unusual activity]

Analyze:

- Cost percentages vs. industry standards for clubs
- Cost per cover analysis
- 3 specific improvement strategies that won't hurt member experience
- Potential savings from each strategy
- Implementation difficulty (Easy/Medium/Hard)

● INTERMEDIATE LEVEL CONTINUED

When you're comfortable with basics and want more depth

7. Member Retention Insights

You are a member experience analyst. Help me understand our member retention and develop improvement strategies.

Attached reports: [Upload membership report with retention data]

Additional context:

- Common resignation reasons: [list if known]
- Member satisfaction scores: [if available]

Provide analysis on:

- How our retention compares to industry standards
- Early warning indicators of at-risk members
- 3 specific retention improvement strategies
- ROI estimate for retention investments

8. Board-Ready Financial Summary

You are an executive communications specialist. Create a compelling financial report for our board meeting.

Attached reports: [Upload monthly/quarterly financial statements and membership report]

Create a board-ready summary including:

- Executive summary (3-4 sentences on overall financial health)
- Key metrics in dashboard format
- Variance explanations in business terms (not accounting jargon)
- Action items requiring board attention
- Forward-looking outlook for next quarter

Keep tone professional but accessible, focus on strategic implications.



ADVANCED LEVEL

Sophisticated analysis for experienced users

9. Strategic Profitability Analysis

You are a club strategic financial consultant. Conduct a comprehensive profitability analysis across all our service lines and provide strategic recommendations for resource allocation and growth.

Attached reports: [Upload departmental P&L, membership analytics, and service utilization reports]

Additional context:

- Shared/allocated costs: \$[amount]
- Allocation methodology: [describe how costs are distributed]
- Strategic priorities: [list 2-3 key club objectives]

Provide comprehensive analysis including:

- Gross margin and contribution margin by service line
- Member lifetime value analysis by membership category
- Cross-subsidization analysis between profitable and loss-making areas
- ROI analysis of potential investments in each area
- Pricing optimization opportunities with member impact assessment
- 5-year strategic recommendations for portfolio optimization
- Resource reallocation suggestions with quantified impact projections

10. Integrated Financial Forecasting & Scenario Planning

Act as my senior financial planning consultant. Create a comprehensive financial model with scenario analysis that accounts for seasonal patterns, member behavior trends, and external economic factors.

Attached reports: [Upload 12-month financial history, membership trends, utilization patterns, and cash flow statements]

Additional context:

- Planned capital expenditures: [list major items and timing]
- Economic concerns: [list any external factors affecting your market]
- Strategic initiatives: [describe any major changes planned]

Develop:

- 18-month cash flow projection with monthly detail
- Three scenarios: Conservative, Most Likely, Optimistic
- Member behavior impact modeling (retention, spending, utilization)
- Seasonal adjustment factors based on historical patterns
- Sensitivity analysis for key variables (membership levels, F&B volume, external economic factors)
- Risk assessment with mitigation strategies
- Strategic recommendations for cash management and growth investments
- Board presentation summarizing key insights and decision points

QUICK REFERENCE: THE 4 PILLARS

PERSONA Examples:

- "Act as a financial analyst" (Beginner)
- "You are a club operations expert with 15 years experience" (Intermediate)
- "Act as my senior strategic consultant" (Advanced)

PURPOSE Examples:

- "Tell me the 3 most important things" (Beginner)
- "Analyze performance and provide insights" (Intermediate)
- "Conduct comprehensive analysis with strategic recommendations" (Advanced)

PARAMETERS Examples:

- "Focus on anything unusual" (Beginner)
- "Focus on variances over \$5,000" (Intermediate)
- "Provide 18-month projections with scenario analysis" (Advanced)

PROCESS Examples:

- "Review and highlight" (Beginner)
- "First analyze, then recommend, finally prioritize" (Intermediate)
- "Develop comprehensive framework, analyze scenarios, finally provide strategic recommendations" (Advanced)

Contact

Questions about these prompts or AI implementation?

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PRO TIPS FOR BETTER AI RESPONSES

For Manufacturing:

- Add production metrics, quality data, safety records
- Focus on efficiency, waste reduction, cycle time
- Include supply chain considerations

For Retail:

- Include sales data, inventory turnover, customer traffic
- Focus on conversion rates, basket size, seasonal patterns
- Add merchandising and staffing optimization

For Professional Services:

- Include utilization rates, project profitability, client satisfaction
- Focus on billable hours, resource allocation, pipeline management
- Add client retention and growth strategies

For Technology:

- Include sprint velocity, bug rates, deployment frequency
- Focus on technical debt, innovation metrics, time-to-market
- Add talent retention and skill development

INDUSTRY-SPECIFIC ADAPTATIONS

1. Be Specific with Context

- Industry, company size, team size
- Current challenges and constraints
- What success looks like

2. Provide Clean Data

- Remove sensitive information first
- Organize data logically
- Include relevant time periods

3. Iterate and Refine

- Start broad, then narrow focus
- Ask follow-up questions
- Request different perspectives

4. Validate Outputs

- Check against your experience
- Run ideas by your team
- Start with small tests