

Hospitality Financial Leadership

Creating Greater Influence and Increasing
Your Impact as a Financial Manager



David Lund
The Hotel Financial Coach



Hospitality Financial Leadership - For the Financial Manager

Online Hospitality Financial Leadership Workshops For Financial Managers Menu

1. Your Higher Mission
2. What Your Leaders Really Want
3. Service – Yes. That’s right.....
4. Give the Numbers the Right Voice
5. What to Teach Your Leaders
6. The Monthly Financial Circle
7. More Leadership
8. Teaching Productivity & Labor Controls
9. Teaching How to Manage Expenses
10. Your Power Tools

Upwardly mobile hospitality financial leaders today want to have more influence and greater development opportunities. Reporting the numbers is your day job, the real career opportunity is developing a cohesive operations team that follows your lead.



SCOPE, REACH AND EXPERIENCE



YOUR TEAM NEEDS PROVEN TECHNIQUES



YOU NEED PROGRAMS THAT WORK AND LAST



YOU NEED A PROGRAM CUSTOMIZED FOR YOUR BUSINESS

**AN INVESTMENT
IN KNOWLEDGE
ALWAYS PAYS
THE BEST INTEREST.**

- BENJAMIN FRANKLIN

HOTEL
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FINANCIAL COACH

Workshop – Series Outcomes

- Individuals will complete training in all essential facets of hospitality financial leadership for the financial leader.
- Training is designed for upwardly mobile and senior hospitality financial leaders who want to grow their role and influence in they're organization.
- Be confident and ready for more success leading non-financial managers in the business of hotels.
- Feel the limitless possibilities that comes from reaching for your full leadership potential.

Module One – Your Higher Mission

- Shift Your Thinking
- Begin With The End In Mind – Creating a Financially Engaged Leadership Team In Your Hotel
 - Why Don't Directors of Finance Step Up?
 - Who Inspired You?
- What Do Peter Pan and Your Leaders Hotel Careers Have in Common?
 - Two Lies You Need to Stop Telling Yourself
 - Ego is Not Part of the Recipe
 - Creating Hospitality Financial Leadership – A "RelationShift"



Module Two – What Your Leaders Really Want

- Getting Close to the Engine Room
 - What to Avoid
 - Is Your Hotel Culture Blame or Appreciation
- Why Does it Take So Bloody Long to Do the Hotel Budget?
 - Teach Flow Thru
- What Is “Hospitality Financial Leadership Anyway”
 - Share the Financials in Your Hotel or NOT



Module Three – Service – Yes that’s right...

- I Was a Miserable Failure
- Educating Our Leaders Is The Highest Form of Service
 - Engage Their Hearts and Minds First
 - Nobody Gets to be Wrong
- Not Flying-by-The-Seat-of-Your-Pants – AKA – No Hospitality Financial Leadership
- Financial Leadership - How can we create it every day in our hotel?
 - Look for Owners Not Victims



Module Four – Give the Money the Right Voice

- The Paper Can't Talk
 - The Forecast Disconnect and How to Correct It
 - Teach the Concept of Owner Spend
 - Teach REVPAR Index
 - Teach Them What Owners are Looking For
 - Why Teaching Accounting in Hotel School is a Waste of Time
 - Do Your Hotel Financial Statements Pass The Test?



Module Five – What Hotel Financial Leaders Need to Know

- Welcoming Imperfection
- If You Know How to Do Something
 - Only 2% Better
- The Top 10 Forecasting Secrets
- Top 10 Hotel Budget Review Tips
 - Teach the Basic Principles
- Teach Assets, Liabilities and Equity



Module Six – The Monthly Financial Circle

- A Curse or a Blessing?
- The System to Follow to Create Financial Leadership in Your Hotel
 - Your Leaders Really Want to Do Their Forecast
 - Teach - How to Read the Hotel Financial Statements and The Link
 - The Monthly Financial Circle
 - F T A R W



Module Seven – More Leadership

- Why Don't Your Leaders Want to Step Up?
 - The Third Pillar
 - Nobody Gets to be Wrong
- What Everyone Needs to Know About Hotel Financial Skills
- Why Financial Acumen is So Important to Their Hospitality Career
 - Agreements Not Expectations
 - A Bit About You Sally



Module Eight – Teaching Productivity and Labor Controls

- Creating and Using Staffing Guides
 - Using EFTE's
- Creating and Using Your Own Labor Productivity Tools
- EFTE's and Productivity Measurements & Why You Need to Use Both
- What's Missing with Labor Planning Tools?



Module Nine – Teaching Your Leaders How to Manage Expenses

- Zero Based Expenses – How to Plan and Manage
 - Using Expense Check Books
 - Beverage Cost or Contribution Margin?
- Fixed/Variable Costs and Room Revenue Management
 - Every Line Needs an Owner

Financial Statement Analysis and Their Hotel Career

- The 80/20 Rule and Food Cost

Equip leaders of tomorrow
with industry business-savvy
concepts and experiences
...they will love it!



Model Ten – Your Power Tools

- A Boring Routine Secretly Equals Power
 - The Morning Meeting
- Never More Than Two Degrees of Separation
 - Applying Constraints To Your Work
 - Management Incentive Plans
- Creating Property Performance Commentaries
 - How to Turn \$250 Dollars Into a Million



Online Workshop Series FAQ's

- Online workshops can be delivered via your online platform on a schedule to be determined with HFTP
- Online workshops are 50- 60 minutes each
- Copies of the deck are supplied to the organizer for distribution after each session
- Each webinar is live, and participants can contribute & ask questions
- Pricing – available upon request
- Recordings can be arranged with an additional end user license and revenue split agreement
- Additional workshops are available as well as 1-1 mentorship



Why Hire David Lund

You Need a Return on Your Training Investment and Real Expertise



Your investment will pay off right away because you will be able to show your managers how they can increase their effectiveness with their departmental finances in your hotel. David will make it easier for your team's managers to engage in the financial piece by getting them to see what's in it for them. Greater career prosperity and success is directly linked to their financial leadership abilities. It's not accounting, it's business thinking! Your managers will see that developing a deeper interest and responsibility for their department finances will take them on the fast track to greater hotel profits and individual career success.

David is not just a speaker, coach and workshop facilitator, **he has over 30 years of hands-on experience including hotel operations, finance, corporate and executive leadership in more than 10 different hotels throughout North America.** In addition to his hotel expertise, he has held regional and corporate positions that have given him enormous exposure to hundreds of hotels and their financial processes.

David Lund
Author and Hotel
Financial Coach



YOU NEED A PROGRAM CUSTOMIZED FOR YOUR BUSINESS

Even though David has given hundreds of programs he has never delivered the same one twice. **He always customizes his talks and strategic working sessions to match the customer's needs,** including using their financial information so participants see and feel how this applies to their role. This makes a huge impact and benefits the learning process to your team. There is no cookie-cutter. YOU are no cookie!

For example, David gives each client a workshop menu to select their event content, and like any great server, **he provides guidance and explanation to create a unique and profound experience for each one of his events for all his guests.**



YOUR TEAM NEEDS PROVEN TECHNIQUES

For many people in our industry, they see the numbers as the hard part of hospitality, and they really don't want to feel embarrassed by their lack of understanding. It doesn't need to be that way. **David presents relevant information and tailors it for non-financial people. It is accessible to anyone who wants to learn.**

David slows things down and creates a knowledge base for his audience. Once this foundation is in place, he puts relevant and hotel specific concepts to work. Doing this gives your team the confidence to get more involved. **With a more empowered attitude, your team will see that the numbers are approachable and that financial control over their department is achievable.**



YOU NEED SUBSTANCE AND RELEVANCE – NOT JUST “MOTIVATION”

Your managers want to be confident and master their finances because they know it's the **fast track to higher earnings and career success.** Being a leader and master of your numbers is not a cliché, it is a proven strategy for career growth. You can earn more for your business by investing in your manager's financial education.

When you invest in your team you will earn their respect because it shows that you value them. You see their potential for success. With David's proven method of teaching you forward-looking enterprise and leadership skills, your managers will feel more fulfilled in their role and have more pride in their performance. **All of which makes you more profit.**



SCOPE, REACH AND EXPERIENCE

You're busy. David gets that and **he works tirelessly to deliver the results you need.** With his experience, he knows how business levels, turnover and the never-ending to-do's affect both your time and that of your leadership team. His financial leadership system is designed to keep everyone on track with a simple 5 step formula that repeats month after month. A simple to follow routine and a straightforward system are the key to getting your team on board.

David knows the challenges you face in running your hotel and partners with you to deliver superior operating results. **He knows that creating engagement with the financials at the departmental manager level is the key to financial stability.**



YOU NEED PROGRAMS THAT WORK AND LAST

You want to make sure your teams implement the tools and systems that David delivers. You won't be left without support for the program. Hotels don't easily change their financial culture so David is there to reinforce those changes, month after month. **His system is specifically designed to address the challenges of hotel department managers and the finance leaders face.** His no-nonsense approach takes into account the service they provide and business levels that department managers experience every month.

How can he continue to help you? First, you have access to David via email or phone to answer any questions your team might have after the event. He also adds all your leaders onto his weekly financial leadership blog so they can be updated when new educational content is produced. If you haven't seen the blog than you've got to check it out, it's a wealth of information.

Second, David has a series of workshops that compound the learning and the impact. Each month the window opens and closes for your team and he helps you focus on exactly what each member needs to do with 1-1 coaching and follow up. Each member has their own actionable plan. No blanket approach here. No one gets excused from their financial responsibilities! He also has available a series of over 120 video classes for self and team learning.

Third, he helps the team establish a system to measure and communicate the effectiveness at each level of the system. This ensures that no one gets left behind. Month by month you will see permanent financial progress and results.

HOTEL
★★★★★
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Book David Lund To Create Hotel Teams
That Know How to Increase Profit

Call 415-696-9593 or
Email david@hotelfinancialcoach.com

I cannot recommend working with David enough! I was at a pivotal time in my career and knew that I needed to improve my financial leadership skills when I came across one of David's articles online. It turned out that one of my colleagues on the West coast had coincidentally been recently coached by David and raved about the success she had working with him. Learning how to be more effective as a financial leader has allowed me to grow my career and effectiveness with my management team.

TESTIMONIAL



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