Strategic Planning from the Club Manager’s Perspective

John R. “Jack” Sullivan, CCM
Kurt D. Kuebler, CCM
Strategic Planning

- What club executives are coming to realize about strategic planning that those in the ‘other’ business world have known for some time.
- A strategic plan can be one of the most important items in a club executive’s tool box!
Are You Thinking Strategically?

The cat said to Alice as she hesitated along the path to Wonderland,

“If you don’t know where you are going, any road will take you there”

--- Lewis Carroll
Alice’s Adventures in Wonderland
Are You Thinking Strategically?

“Even if you are on the right track, you’ll get run over if you just sit there.”

--- Will Rogers
We visit a lot of clubs each year......
We get a first hand view of.....

- The good!
- The bad!
- And, the highly dysfunctional in the club world!!
Hit The Ground Running
by Jason Jennings

Strategies and tactics used by many of today’s successful CEOs in the non-club world have been used by club executives in the past few years in response to the economic and changing lifestyle challenges that have greatly impacted club life as we knew it.
Strategic Planning

One of the two most important Committees in the Club!

- The Board needs to carefully consider the constitution of the Committee and provide a means of continuity without cronyism!
- This is NOT simply a means of identifying capital projects to undertake or consider!
- Go back to the Mission Statement --- and to the Action Plan --- MODEL CLUBS use their Committees effectively and wisely to consider issues and make recommendations to the Board
- NEEDS TO START WITH A S.W.O.T.
In Today’s Club World...

Strategic Planning is Global Thinking

- Too often, the Strategic Planning Committee languishes or is inactive and ineffective. For the Club to be viable in the future, this Committee and Plan must be fluid, visited continually and communicated on a regular basis to the Membership!
- Model Clubs make Strategic Planning a Priority and normal order of business!
Strategic Planning Committee

What should the Committee be considering?
- Governance issues
- Board and Committee job descriptions
- Mission and Vision Statements
- Membership issues and categories
- Capital programs
- Competitive analysis of the competition
- Feasibility studies
- 3 to 5 years out, 5 to 7 years out, and so on...
Strategic Planning
Things to Consider

- It’s a road map for the future (beyond just tomorrow!) in an environment where often-times the ‘players’ change (Board and Committee members, etc.)

- It’s NOT just a capital plan to determine facility needs, but the strategic plan helps to determine and support capital decisions that MAY be needed, amongst many other things that will help to keep the club vibrant and perpetuating
Strategic Planning

It determines *who and what you are* and *what purpose you serve*, or serves to reiterate same in an environment (club industry recession) where many clubs have to do ‘extreme makeovers’ just to stay alive! In effect, it establishes or, more likely in this case, re-establishes your ‘brand’ so that all constituencies, internal and external, are clearly aware of who and what you are and provide
Strategic Planning

- It helps to *prepare for* and *manage* change (and yet deter “change” for the sake of “change” each year by new Boards), which has become an increasingly more ‘normal’ part of the club world
- It’s about being PROACTIVE rather than REACTIVE, especially in this economic environment and while the club is still outperforming others in the local market
- It provides the club management team with clear and measurable goals and objectives
- It’s *strategic* in nature, but sets the tone and annual direction for operational decisions and efforts
Benefits of Strategic Planning

- Helps your club understand and clarify its objectives and set goals accordingly (attainment of common goals)
- Defines short-term actions and avoids deviating from “The Bronze Plaque on the Wall” (forces decisions/actions)
- Gets member and employee buy-in early in the process to facilitate positive (politically supportive) change
Benefits of Strategic Planning

- Lends a greater degree of confidence of long-term success and improves long-range performance (helps the club remain economically viable while at the same time attempting to become recession proof)
- Unites the membership and staff through consensus building!
- Creates a healthy disciplined methodology for decision making (laser-like)
- It is one of the common denominators found in today’s top performing clubs
Strategic Planning

- The Purpose of such planning is NOT to produce a Plan...
- It’s to produce RESULTS!
Strategic Planning

- Strategic Planning - The Long-Term Vision (3-5, 5-10, 10-15 years out)
- Business and Operational Planning – The Day-to-Day Activities within a fiscal year (each year’s budget)
- Strategy Evaluation – Constant monitoring and review (a “living” document)
1. Conduct Surveys or Hold Focus Group Meetings
   0 Include membership and key staff – utilize other club’s and industry data
   0 Create a database of member preferences and utilization
   0 Identify any “controversial”, “divisive” or other sensitive issues – keep in mind that all goals and objectives will be effected by these
How, Where and When

2. Key Strategic Questions
3. Prepare Historical and Prospective Financial Analysis
4. Perform an Operational Analysis
5. Seek Census Information
6. Perform a Physical Plant and Capital Needs Assessment
7. Develop a realistic timeline – three to six months
8. Hold Off-site Retreats and/or monthly meetings
Focus Groups

- Focus groups provide valuable information that can be used to "drill-down" for more detail on specific issues.
- May be used to develop specific questions for surveys on club issues.
### SWOT Analysis

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<thead>
<tr>
<th></th>
<th>Strengths</th>
<th>Weaknesses</th>
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<tbody>
<tr>
<td>Internal</td>
<td></td>
<td></td>
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<tr>
<td>External</td>
<td>Opportunities</td>
<td>Threats</td>
</tr>
</tbody>
</table>

- **Strengths**
- **Weaknesses**
- **Opportunities**
- **Threats**
SWOT Factors

- Strengths and Weaknesses are internal factors

- Opportunities and Threats are external factors
Simple SWOT Rules

- Be realistic about the strengths and weaknesses of your club
- Analysis should distinguish between where your club is today, and where it could be in the future
- Be specific, avoid grey areas
- Always analyze in context to your competition
- Keep your SWOT short and simple
- SWOT is subjective
Strengths Could Be

- Location of your club
- Facilities
- A new innovative service
- Quality processes and procedures
- Any other aspect of your club that adds value to your services
Weaknesses Could Be

- Lack of marketing expertise
- Undifferentiated services (i.e. in relation to your competitors)
- Location of your club
- Damaged reputation
- Facilities
Opportunities

- Opportunity to define the future and mission of the club
- More open communications with members
- Increase number of members using the club
- Development of a general marketing strategy
- Unity of purpose between the Club and HOA
- General Improvements to Club Facilities
- Appropriate balance of exclusivity and community involvement
Threats

- Competition / Overbuilding of Clubs
- Inflated cost structure of your club
- Community built-out and no longer promoting a strong marketing plan
- Lack of sale of properties within the community
- Resignation list
Mission and Vision Statements
Basic Questions to Establish Values

- Who are you?
- What do you do?
- Who do you do it for?
- These answers will help you develop your mission statement.
**MISSION STATEMENT:**
Ballantyne Country Club is dedicated to the consistent delivery of high quality personal service and excellent value, in a warm atmosphere of camaraderie, for the enjoyment of its Members, their families and guests.

**VALUE STATEMENT:**
Charlotte’s premier family oriented private club we value excellence, integrity, teamwork, personal relationships and environmental and social responsibility.

**CORE VALUES:**
Values that are truly important direct the decisions we make, define our character and preserve what is special about Ballantyne Country Club. They are:

**Service:**
We go to extraordinary lengths to satisfy and delight our customers. We are passionate about the service we provide and the opportunity we are given to do so.

**Excellence:**
We strive to be the very best we can be in everything we do.

**Integrity:**
We engender trust and respect; acting ethically and encouraging honest and open communication.

**Diversity:**
We ensure an interesting and inclusive environment and treating people, as we would like to be treated.

**Social Responsibility:**
We are active members of the greater Ballantyne and Charlotte area communities. We pay forward both financially and through the works of our members.

**Shared Purpose:**
Our success is dependent upon the collective energy and work of all our members and staff.

**Environmental Responsibility:**
We respect our environment and recycle, reuse and reduce waste wherever and whenever we can.
Mission Statement

- Describes the overall purpose of the organization.
- Must “work” not only today but for the intended life of your strategic plan.
- Should be broad enough to allow for diversity, but specific enough to provide the focus necessary to the success of your club.
Sample Mission Statements

The Kansas City Country Club is a traditional, private, family-oriented Country Club dedicated to providing year-round dining, social and athletic activities to its members and their guests through superior service, staff and facilities.”

“The Ritz-Carlton is a place where the genuine care and comfort of our guests is our highest mission. We pledge to provide the finest personal service and facilities for our guest who will always enjoy a warm, relaxed, yet refined ambience. The Ritz-Carlton experience enlivens the senses, instills well-being, and fulfills even the unexpressed wishes and needs of our guests.”
Sample Mission and Vision Statements

Star Trek Mission: To seek out new life and new civilizations. To boldly go where no one has gone before.

Star Trek Vision: Space . . . the final frontier.
Sample Mission Statement

The vision of Southwest Airlines is dedication to the highest quality of Customer Service delivered with a sense of warmth, friendliness, individual pride, and Company spirit.
Sample Mission Statement

To maximize satisfaction, desirability, value and distinction of Membership in Ocean Reef Club by providing unsurpassed value, excellence and quality in all services and facilities.
Oakmont's Mission Statement

The mission of OAKMONT COUNTRY CLUB is to provide its Members with a premier golf and country club experience that includes a well-maintained, highly respected and competitive golf course; an attractively designed and efficiently operated Clubhouse that meets the membership's requirements for excellent and uncompromising service, exceptional and intimate dining with the finest quality food and beverage, ample meeting and banquet facilities; and the maintenance of the Club’s unique atmosphere of a strong and friendly family orientation.
Short-Term Objectives and Action Items
Naples Golf Club Mission

The mission of the Naples Golf Club, as one of the most distinctive private clubs in Florida, is to provide all members, family and guests premier golf, dining and social experiences in a relaxed and comfortable environment. The Club will operate in a transparent and responsive manner with members and will treat each member and employee with dignity and respect. The Club will maintain the highest ethical standards and, as a corporate citizen of Naples, will actively support local civic and charitable organizations.
Appropriate Balance of Exclusivity and Community Involvement Golf Committee & Management (Opportunity)

- Scholarship Fund for more than employees
- Employee Participation in Community Organizations and Activities
- Board will consider golf & social charity events recommended by the appropriate committees that will be beneficial to our community without negative impact to the membership
- Golf outing to raise funds for scholars
More Open Communication with Membership Communication Committee & Management

- Weekly email updates
- Quarterly financial updates
- Mail annual audited statement
- Bi-monthly membership information meetings
Grosse Pointe Yacht Club
Mission Statement

Continue to be a premier private yacht club, among the finest in North America, also providing high-quality family and social programs to its members.
2000 Strategic Direction
Extend 1993 Objectives with Initiatives

1. Maintain strong financial viability -- Board and Finance Committee
2. Encourage and develop yachting (sailing and boating) and other family activities through programs of the Club -- Social/Athletic Committees
3. Maintain highest quality harbor -- Harbor and Engineering Committees
4. Provide high-quality services which achieve a high level of member satisfaction -- Social/Athletic and Harbor Committees
5. Keep Clubhouse and facilities in very attractive manner -- Facilities and Engineering Committees, Staff
Grosse Pointe Yacht Club

2000 Strategic Direction
Extend 1993 Objectives with Initiatives

6. Maintain adequate membership levels while assuring the highest caliber of members -- Board and Membership Committee
7. Attract and retain high quality staff -- Board and staff
8. Obtain community respect for the value the club provides its neighbors
9. Attract and retain forward thinking, creative leadership
Grosse Pointe Yacht Club

2. Encourage and Develop Yachting (sailing and power boating) & other family activities through programs of the Club

Major Strategies

2.1 Develop and Implement Strong Educational Programs
2.2 Maintain Active Social Programs
2.3 Sponsor competitive events
2.4 Continue developing a premier sailing program - jr. sailing, yachting
2.5 Develop a premier power boating program - yachting
2.6 Develop a premier swimming program - swimming
2.7 Develop high quality tennis program - tennis
2.8 Develop a high quality member fitness center - engineering
2.9 Develop a high quality golfing program - strategic planning
2.10 Develop high quality equestrian sports - strategic planning
Grosse Pointe Yacht Club

2.4 Continue developing a premier sailing program, among the finest in North America

Level I: Among the finest on lake St. Clair (DRYA)

2.4.1 Continue to upgrade current coaching compensation and number

2.4.2 Continue to upgrade boats and equipment

2.4.3 Maintain high level of team spirit, including parents, by participation and compensation

2.4.4 Empower sailing master and coaches to manage team without parental interference

2.4.5 Continue to promote Yachtsmen’s Day activities and Yachtsman’s fund to support programs

2.4.6 Build an endowment to facilitate club Jr. sailing and facilitate High School racing programs

2.4.7 Continue to support local High School racing programs

2.4.8 Promote a leadership role in the DRYA
2.4 Continue developing a premier sailing program, among the finest in North America

Level II: Among the finest on the Great Lakes

2.4.9 Sponsor/Host regional sailing competitions
2.4.10 Develop relationships with regional competitive sailing programs including clubs, schools, colleges, and universities
2.4.11 Continue to enhance funding sources for the Endowment fund and Yachtsmen’s Day
2.4.12 Financially support the travel expenses for Jr. sailors and coaches to regional competitive sailing events
2.4.13 Continue to maintain and enhance equipment and boats
2.4 Continue developing a premier sailing program, among the finest in North America

Level III: Among the finest in North America

2.4.14 Promote year-round competitive sailing opportunities
2.4.15 Develop relationship with national colleges and university sailing programs and coaches
2.4.16 Host/sponsor national and international sailing events at GPYC
2.4.17 Fund travel expenses for sailors and coaches to national and international regattas
2.4.18 Continue to promote additional fund sources for the endowment and Yachtsmen’s Day
2.4.19 Olympic Sailor from GPYC!
Grosse Pointe Yacht Club
2010 Vision & Updates

- Provide excellent facilities and programs for sailors and boaters of all generations.
- Be an outstanding family-oriented club that fosters camaraderie, fellowship and sportsmanship among the members.
- Be recognized for its warm and hospitable treatment of its members and guests and for welcoming new members into the Club.
Grosse Pointe Yacht Club
2010 Vision & Updates

- Ensure the Club has premier, well-maintained facilities and programs to meet the needs and expectations of the membership.
- Provide for the acquisition and retention of high caliber employees to render services desired by the membership.
- Have effective leadership that performs in a fiscally responsible manner.
- Preserve and protect the reputation and traditions of the Club, while welcoming change to insure the Club’s future prosperity.
Sawgrass Country Club’s Strategic Plan End Product 2004

- A five year Financial Projection was created
- Starts with Club-wide assumptions regarding the general economy, membership changes, salaries and benefits and general operating expenses
- Both operating and capital budgetary needs are addressed
Sawgrass Country Club’s Strategic Plan End Product 2004

- Each department includes final consensus position regarding the following:

  - Assumptions – utilization/resources/staffing/Price points
  - Strengths – internal/external/political/logistical
  - Weaknesses - same
  - Objectives – specific to each department/DH and Committee tie-in
  - Strategies – each department’s clear vision to achieving objectives
Sawgrass Current Mission

To provide an exceptional Sawgrass Experience by combining the uniqueness of our oceanfront location with excellent golf, tennis, fitness, dining and social activities for the enjoyment of Members, their families and guests. We are committed to our Members’ satisfaction and warmly welcome new members into our community.
Sawgrass Current Vision

- To enhance the Sawgrass Experience by continuously improving amenities and service to achieve a high level of Member satisfaction.
- We will strive to make our golf, tennis, fitness and beach facilities comparable with the best in our area and ensure that our facilities are inviting, functional and well maintained.
Sawgass Current Vision

- We will offer a variety of enjoyable dining and maintain a level of service throughout the Club where every Member and guest is treated as a preferred customer.

- The long-term success of our Club will be further assured through our financial soundness and fiscal responsibility, securely establishing Sawgrass as the first choice for those seeking the best private club experience and value in our area.
The most important part of the plan!

- Remember the purpose of the plan is not to produce a plan, but to produce results!
- To do so you must understand who is responsible and accountable for what
- Responsibility, Authority and Action Chart
## Board, Committee and Management Roles and Responsibilities

<table>
<thead>
<tr>
<th>Area/Department</th>
<th>Board/Committees</th>
<th>Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Long Term &amp; Strategic Goals</td>
<td>Determines/Approves</td>
<td>Provides Input</td>
</tr>
<tr>
<td>Short Term Goals</td>
<td>Monitors</td>
<td>Establishes and Executes</td>
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<tr>
<td>Day-To-Day Operations</td>
<td>Monitors</td>
<td>Makes All Management Decisions</td>
</tr>
<tr>
<td>Budget</td>
<td>No Role</td>
<td>Develops/Recommends</td>
</tr>
<tr>
<td>Capital Purchases</td>
<td>Approves</td>
<td>Prepares Requests</td>
</tr>
<tr>
<td>Decisions on Building Renovations and Expansions</td>
<td>Makes Decisions that are Responsible Considering MAJORITY of Members Best Interests</td>
<td></td>
</tr>
<tr>
<td>Supply Purchases</td>
<td>Sets Policy/Approves Budget</td>
<td>Provides Input, if Authorized Signs and Executes Contracts</td>
</tr>
<tr>
<td>Emergency Repairs</td>
<td>Works with GM and Acts with Concurrence from Chair</td>
<td>Purchases According to Policy</td>
</tr>
<tr>
<td>Fees</td>
<td>Adopts Policy</td>
<td>Notifies Board Chairs</td>
</tr>
<tr>
<td>Hiring of Staff</td>
<td>No Role</td>
<td>Develops Fee Schedule</td>
</tr>
<tr>
<td>Staff Deployment and Assignment</td>
<td>No Role</td>
<td>Approves all Hiring</td>
</tr>
<tr>
<td>Personnel Policies</td>
<td>Adopts Policy</td>
<td>Establishes and Executes</td>
</tr>
<tr>
<td>Staff Salaries</td>
<td>Allocates Line Item for Budget</td>
<td>Recommends/Administers</td>
</tr>
<tr>
<td>Staff Evaluations</td>
<td>Evaluates ONLY the GM</td>
<td>Approves Salaries and Recommendations from Supervisory Staff</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Evaluates all Other Staff</td>
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Addison Reserve’s Accountability Matrix
Michael McCarthy, Club Executive of the Year 2010
Fernando Leal, Club President of the Year 2010

**Clubhouse Project Accountability Matrix**

<table>
<thead>
<tr>
<th>Conceptual and schematic design phase</th>
<th>Owner’s Rep</th>
<th>General Manager</th>
<th>Executive Committee</th>
<th>Board</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review and approve schematics for design development</td>
<td>Analyze</td>
<td>Recommend</td>
<td>Review</td>
<td>Approve</td>
</tr>
<tr>
<td>Review and approve scope changes (ongoing)</td>
<td>Analyze</td>
<td>Recommend</td>
<td>Review</td>
<td>Approve</td>
</tr>
<tr>
<td>Discuss value engineering to meet budget guidelines (ongoing)</td>
<td>Recommend</td>
<td>Approve</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Establish legal review and contract signing process</td>
<td>Analyze</td>
<td>Review</td>
<td>--</td>
<td>Approve</td>
</tr>
<tr>
<td>Review / approve contracts for owner’s rep, architect and interior design</td>
<td>Analyze</td>
<td>Recommend</td>
<td>Approve</td>
<td>Be informed</td>
</tr>
<tr>
<td>Select a general contractor to serve as preconstruction advisor</td>
<td>Recommend</td>
<td>Review</td>
<td>Approve</td>
<td>Be informed</td>
</tr>
<tr>
<td>Approve loan agreements</td>
<td>--</td>
<td>Review</td>
<td>--</td>
<td>Approve</td>
</tr>
<tr>
<td>Review and approve budget changes/use of contingency (ongoing)</td>
<td>Recommend</td>
<td>Recommend</td>
<td>Review</td>
<td>Approve</td>
</tr>
<tr>
<td>Establish change order maximums</td>
<td>Recommend</td>
<td>Recommend</td>
<td>Review</td>
<td>Approve</td>
</tr>
<tr>
<td>Change order monitoring</td>
<td>Analyze</td>
<td>Approve</td>
<td>Be Informed</td>
<td>Be Informed</td>
</tr>
<tr>
<td>Set up insurance and legal needs</td>
<td>--</td>
<td>Review</td>
<td>Approve</td>
<td>Be Informed</td>
</tr>
<tr>
<td>Review staging plan to achieve minimal disruption to membership 5/10</td>
<td>Analyze</td>
<td>Recommend</td>
<td>Review</td>
<td>Approve</td>
</tr>
<tr>
<td>Preliminary construction budget</td>
<td>Analyze</td>
<td>Recommend</td>
<td>Review</td>
<td>Approve</td>
</tr>
<tr>
<td>Communicating to members</td>
<td>Analyze</td>
<td>Approve</td>
<td>Be Informed</td>
<td>Be Informed</td>
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Note: Scope change—Adding or deleting square footage or function not originally approved.
## Critical Success Factors – Preliminary Report
Lakewood Country Club

**ISSUE:** Restore/Enhance Volunteer Leadership Credibility to Membership

### OBJECTIVE:
**Responsive, membership-supported Leadership by Board, Committees and Management Team**

### STRATEGY:
Enhancement of communications on all levels; improved opportunities for member and staff input and responsiveness

<table>
<thead>
<tr>
<th>Tactics to Support the Action</th>
<th>Desired Outcome of Tactic</th>
<th>What's Needed to Make This Happen</th>
<th>Critical Success Factor</th>
<th>Target Date of Completion</th>
<th>Potential Hurdles</th>
<th>Updates (R/Y/G)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Board Meeting recap notes or 'briefs' to members following each Board meeting</td>
<td>Regular flow of Board discussion information to membership; overcoming 'politics as usual' sentiment of membership</td>
<td>President/GM to recap immediately after each meeting, place on line and post in both locker rooms</td>
<td>Leadership Credibility</td>
<td>October 1, 2010</td>
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</tbody>
</table>
| Robust and 'open' nominating process for new directors and committee members | Improving members' perception of 'self perpetuating' board and overall process to attract the 'best' people to serve on the Board and committee | - Review of the roles and responsibilities for all volunteer roles in conjunction with the Club's 'business plan' (Board/GM)  
- Review the nomination process and create a clear plan for future recruitment of volunteers (Board/GM) | Leadership Credibility | November 1, 2010 |  |  |
Who Should Take Charge of the Process

- The President or Chairman
- The Facilitator
- The General Manager/ COO
OPERATIONAL CHARTER
AND
GUIDING PRINCIPLES

Adopted: __________
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VISION STATEMENT

Charlotte Country Club will be among the premier family country clubs in the United States.

EMPLOYEE MISSION STATEMENT

Our mission is to provide a personal, unparalleled country club experience highlighted by superior facilities and highly skilled club professionals performing with gracious hospitality.
Keys to Operational Success

- Continued economic growth in the Charlotte area.
- Finding and initiating only the finest quality candidates for Membership in Charlotte.
- Continued improvement to our physical facilities to maintain our status as one of the premier clubs of choice in the United States.
- Maintain our quality staff members through continued low turnover. Provide a safe, healthy, positive work environment with competitive wages and opportunity for growth.
- Financial stability with break even operating budgets.
- Provide consistently superb service to our Members.
Charlotte Country Club
Business Plan
2007 - 2011

Employee Mission Statement
Our mission is to provide a personal, unparalleled country club experience highlighted by superior facilities and highly skilled Club professionals performing with gracious hospitality.

<table>
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<tr>
<th>Strategic Goals</th>
<th>Specific Expectations</th>
<th>Action Items</th>
<th>Responsible Person(s)</th>
<th>Due Date</th>
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“We have never had a failure at this club because of too much planning.”

Carol Stults, Club President
Meadow Springs Country Club
Related Articles

- Strategic Planning – The Common Denominator Found in Successful Clubs

- Strategic Planning in Private Clubs – Who Should Take Charge?
Related Articles

- Education and the Strategic Planning Process
- Private Clubs: To Be or Not To Be a Business
- Articles can be found at www.kopplinandkuebler.com under Newsletters
Strategic Planning
from the Club Manager’s Perspective

Thank you for allowing us to spend time with you today!

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