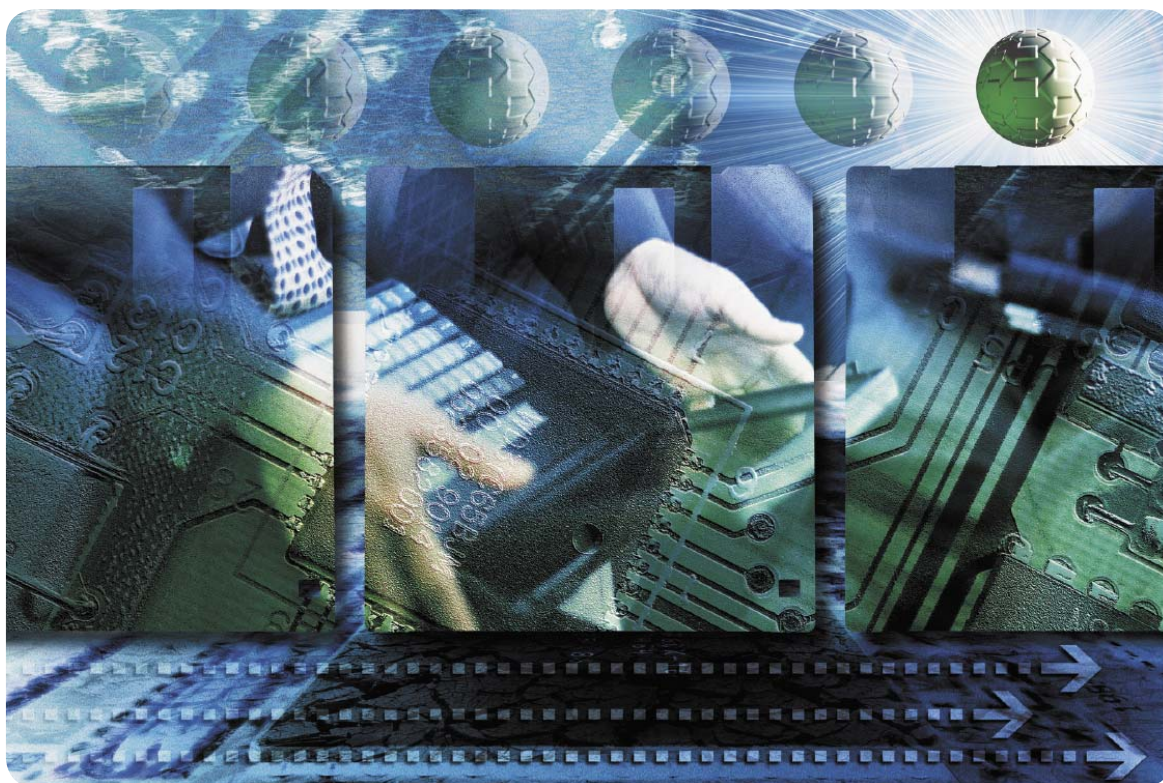


A Front-Burner Approach to **SUCCESSFUL CLUB SOFTWARE CHANGE**



By Bill Boothe

Which would you rather have: great software that offers the most advanced functionality available for private club operations, or very basic software that gets the job done — but lacks the more advanced features available with the top club solutions? Silly question, you say — of course I want the good stuff — with Customer Relationship Management, an advanced relational database with an ad hoc report writer, data mining and warehousing, forecasting and projections, real-time operations and financial information, web site integration and lots more valuable functionality. And


of course, you're right. You should have the good stuff. Only problem is, if yours is like most private clubs, your organization isn't adequately prepared to take full advantage of advanced technology.

Here's a personal story of how advanced technology can be underutilized. About a year ago my wife and I bought our first digital camera. After much analysis and comparison shopping, we chose a model with an extensive features list, high user satisfaction ratings and a good price. Along with the camera came a user's manual — over a hundred pages of instructions and explanations on how to get the most out of our new camera. And where are we a year later with this incredibly versatile instrument? You guessed it — we take basic pictures, use the zoom lens, make minor adjustments for lighting and download photos to our home computer. We spent the better part of a day deciding on which camera to buy

and about 20 minutes learning how to use it. Once we got the basics down, it was on to other things.

And so it goes with club technology. Most clubs invest a significant amount of time and effort in documenting their software requirements, analyzing alternative solutions, reviewing vendor proposals, visiting other clubs using the systems, checking vendor references, negotiating contracts — all in an effort to assure that the club purchases the best system, at the right price. Then, like my wife and I with our digital camera, most clubs get the basics up and running — and move on. For my wife and I, the lost potential from our camera is no big deal — after all, it's just amateur photography. But for private clubs, spending large sums of money on computer technology, it's a very big deal.

So how does all of that up-front effort — and financial investment — become so quickly marginalized after the purchase of

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new club technology? The answer is actually quite simple: Most private clubs are not properly structured to take advantage of the advanced technology they purchase. Being properly structured includes:

- Adopting a “front burner” mindset about computer technology — acknowledging its importance to the club’s overall success.
- Management commitment to using advanced functionality in all club departments.
- Financial commitment to an adequate technology budget — year in and year out.
- Human resources commitment to technology skill levels — ingrained within the club’s hiring, evaluation, promotion and compensation system.

During the past 15 years we’ve had the opportunity to work with more than 300 private clubs, assisting them with the planning and execution of their technology strategies. Although we are extensively involved with the software evaluation and selection process during these projects, our consulting role during implementation is usually more limited to high level oversight. In essence, we depend on the clubs (and the vendors) to make it happen once a final solution is chosen. Based on our direct experience with those clients, and the many implementation “horror stories” we’ve heard over the years from other clubs, we’ve learned the following about club software implementations:

- An effective implementation is critical to the ultimate success of the new software.
- Implementations at private clubs are not usually well-planned or executed.
- Clubs don’t generally take firm control of implementations.
- Clubs often make unrealistic assumptions about vendor responsibilities.
- The new software is often implemented at a “minimal” level.
- The advanced functionality offered by the new software, and its expected value, are often never realized by clubs.

Not a pretty picture, but one that can be easily repainted with a well organized, focused approach to software implementation. The most important element of success is simply recognizing that choosing the right software is only the first of

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many steps in the change process. In fact, our experience has shown that the evaluation and selection work represents less than 10 percent of the total effort needed to successfully transition to new software. Here are some tools that can help your club with the other 90 percent.

Software Product Champions

One of the most difficult challenges in managing technology change is providing adequate user support during the transition. Traditionally, clubs have looked to the software vendors to provide support — in the form of on-site training, telephone assistance, printed or online manuals, online diagnostics, user-group meetings, and most recently, web-based support and training. The common ingredient in all of these approaches is the same: the assistance and expertise are provided by the software vendor.

But that’s not nearly enough. For years we’ve been encouraging our clients to

add a critical ingredient to the traditional support recipe — support and expertise provided internally by club employees. This approach has proven extremely effective in clubs that have adopted it and kept it alive over a number of seasons. The key players in the approach are called software product champions. These champions are existing club employees (not technical specialists) from each club department, with primary responsibility for the core application software (accounting, membership, POS, inventory, reservations) used within their home departments.

Champions can dramatically improve the club’s success in implementing and maintaining today’s complex application software. Yet most clubs do not support a formal champions program. Instead, clubs depend on a few “computer literate” individuals to surface and “volunteer” for the champion duties. We recommend that clubs create a formal champions program to assure that new systems are implemented properly, and continue to function at optimal efficiency. Software champions are responsible for a number of important tasks:

Master the software applications.

First and foremost, champions are responsible for becoming experts at using their appointed software application(s). Champions receive complete and thorough training from the vendor on each application, and become familiar with all available documentation for those applications.

Pilot test the software. Also known as “software simulation” or “scripted practice,” pilot testing calls for the club’s champions to perform detailed testing of all software functions prior to going live. See below for more on this topic.

Take on-going responsibility. Once the software is operational at the club, the champions take the lead role in operating their assigned application(s), teaching others and providing first line user support. The key to success is having champions responsible for assuring the on-going operational success of the club’s core software applications.

Interact with the software vendor.

Champions are in the best position to understand the club’s specific software problems/issues, and effectively communicate with the software vendor. In fact, the vendors are very supportive of

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the champions concept, knowing that well-trained club employees are far superior to untrained individuals in solving software issues.

Interact with the club's technology professional(s). For those clubs that employ their own professional(s), as well as those outsourcing that function to a local provider, champions act as their "eyes and ears" on the firing line to report equipment and network issues as they occur. Experienced champions can provide critical insights for determining the actual source of systems problems.

To make sure the champions approach takes hold and stays active, we strongly recommend that champion responsibilities be included in the club's human resources procedures. The following will help guarantee the on-going success of the champions program:

Add champion duties to job descriptions. By including specific champion responsibilities in the appropriate job descriptions, management can demonstrate its commitment to the program and emphasize the on-going importance of the champion role.

Conduct regular performance evaluations of champions. As part of the employee's regular performance evaluation, management should include performance criteria to cover the unique champion duties assigned.

Reflect champion duties in promotions and compensation. As with any special skills or responsibilities, champions should be rewarded for their efforts. In most cases, champions perform their special work in addition to their regular job, and should be recognized financially

for this important contribution to the club's success.

Pilot Testing

Pilot Testing is a way of simulating the live operation of the new software within your club. The methodology is designed to allow the club's champions to test the software in a "laboratory setting" by using realistic data and procedures. The actual testing takes place in a dedicated room or area of the club, where users run numerous transactions, procedures and reports as they simulate the software's functionality. Normally, pilot testing requires 2-3 weeks to complete.

The following elements are needed for successful pilot testing:

Pilot testing lab. Usually a small meeting room, the lab must be available for 4-6 weeks and offer security and privacy. The lab must be available before and after regular business hours, since testing will be scheduled based upon user availability. The room should be big enough to accommodate eight to 10 people at a time with the equipment listed below.

Pilot equipment and software. Equipment needs are dictated by the software applications being installed. Generally, you will need the following: connectivity to the club's existing or new network server (where the new software applications are installed), two to three desktop PC's, one high-speed laser printer, two touch screen POS PC's with check printers, two to three remote requisition printers, one bar code scanner and one bar code printer (all of this equipment will be reassigned to users in the club a week or so prior to going live).

Product champions. As discussed above.

Testing scripts. Are designed for each software application. The scripts consist of checklists of functions to be executed by the champions (i.e. "enter a new member — confirm that all information from the existing system can be accommodated by the new system," or "enter a restaurant check with four covers — split the check and assign to two accounts — tender one check to a member account and the other to a guest room...")

User training. Is provided to the champions before the testing begins. The software vendor comes on-site to deliver the training, which takes five to seven days depending on the number of new applications. (Additional training is provided to the champions and other users after the testing is completed.)

Issues tracking. The champions use an "issues report" to record the results of their testing. Each issue is described in detail and assigned a severity level. The report is maintained on the network in Word or Excel and is forwarded to the vendor every few days. Each issue is designated with an "open" status until it is resolved to the club's satisfaction.

Conclusion

Many clubs spend the first year or so after going live on new software just getting to a level of productivity equal to what they had with their old system. A front-burner approach to software implementation is a proven way to assure that your club gets the full and timely benefit of its technology investment. With such an approach, you dedicate the proper amount of financial and personnel resources needed to get "the good stuff" really working for your club. You reduce your risk of start-up problems by identifying issues well before you go live. You make on-going user support an integral part of your club's daily operations. And most importantly, you take firm control of your club's technology future. ■