

# Strategic Planning

## A PLAN OR A PROCESS?



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**Strategic planning in the private club industry is a best practice that has long been used in corporate and other businesses. It determines who you are, what you do and who you do it for.**

It is the road map for the club's future, providing consistency in direction, particularly in an environment where those in leadership positions are continuously changing.

While 25 years ago, very few private club took advantage of this common business tool, today the majority of successful clubs have some form of a strategic plan. However, this is where the process is as important as the document.

Most anyone involved in the strategic planning process will tell you that a strategic plan must be a "living document," one that is constantly reviewed, evaluated and updated as necessary. When this is not done on a regular basis, it can often find a home on a dusty shelf or in a computer file, especially when there is a change in leadership.

I've actually had a few meetings with past presidents who presented a document to me and asked me if I had seen it before, to which I responded no. "Well, this is the strategic plan from the year I was president. I hope that you have more success than I did."

*So what is the true value of a strategic plan and how do we ensure that we have a process that will provide the board and management a tool that remains relevant, while guiding their fiduciary responsibilities?*

First let's address the value and importance. Today's club environment, no different than the rest of the world we live in, is constantly changing and so is our club membership. The good news is that our senior members are living longer, yet they are often satisfied with the status quo.

The younger generation – the senior generation's children and grandchildren – are looking for many different things from their club. A strategic plan will guide the club's leadership in providing facilities, programs and services that will continue to meet the needs of multiple generations.

One club, a multi-cultural and international membership and in making it a living document and process, has established its guiding principles and overall action plan that reflects the needs and desires of a diverse populous, by obtaining the input and buy-in of their membership, board, management and staff.

Ed Ronan, general manager of Bretton Woods in Germantown, Maryland has framed copies of their core values, mission and vision displayed throughout the club. He also takes a copy to every board, committee and staff meeting to reinforce these values, ensuring that they play a vital role in all decisions that are made.

At the historic Atlanta Athletic Club, GM/COO Kevin Carroll pushed the original draft of the club's strategic plan down to all committees and management staff for their input and buy-in. This has led to their being held accountable for all goals and objectives of their plan.

Club President Pat Ford has taken it a step further by establishing the process that requires the strategic action plan to be reviewed once a quarter at a board meeting. During that review, if a strategy or tactic being employed is not meeting a goal or objective, management and committees are required to bring a revised strategy back to the next board meeting for approval.

To ensure accountability, the annual goals and objectives for both management and committees are a direct by-product of the strategic plan.

So, the most successful clubs that we see blend the strategic plan and process by living their core values, mission and vision. They are constantly reviewing and updating their action plans, tying accountability to agreed upon metrics, ensuring that the plan and the process prevail, despite the normal changes in leadership. **BR**

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