

# Member Relationship Management Plan

## Romancing Your Members



**Ed Rehkopf**



## **Member Relationship Management Plan**

Consistently providing personalized service to members is the pinnacle and ultimate challenge of club service. Such service rests on the foundation of Service-Based Leadership, organizational structure and efficiency, consistent management disciplines, and employee training and empowerment.

At its root, personalized service comes from knowing your members, what they like and dislike, and constant ongoing communication that builds rapport and trust – in other words building strong relationships with the membership. But this doesn't happen by accident – like any other discipline of business success it must be carefully planned and consistently executed in its detail by all employees.

The starting point for this is a Member Relationship Management Plan – a plan that describes and sets standards for all aspects of a club's relationship with its members and their guests. The logical person to create and implement the plan is the club's Membership Director or more accurately, the director of member sales and relationships, working in conjunction with the club's department heads.

## **Member Relationship Standards**

What standards should be described in such a plan? Here is my list, though other general managers may add or subtract items as desired:

- The general manager's Statement of Intent for Service and level of engagement for staff interaction with members.
- The director of member sales and relationships' role and expectations for performance.
- Club department heads' role and involvement in Member Relationship Management planning.
- The makeup and function of the club's Member Relationship Committee. Key individuals to participate would be the director of member sales and relationships serving as the chair, and the clubhouse manager, F&B director, head golf professional, and activity director. Other department heads and the general manager would also attend meetings on a periodic basis as necessary.
- The vital and reinforcing role of club's organizational values and culture of service in all interactions with members; suggest enhancements to these as necessary.

## **Other Material Covered in the Plan**

- Synopsis of the membership sales and marketing effort.
- New member onboarding process and the general manager's welcome to new members.



- Member profiles database and member privacy, (see Appendix - Getting to Know Your Members below).
  - Member profiles data collection, archiving of information, and methods to distribute information to employees.
  - Description and examples of the ways that employees can use the member profiles information to provide personalized service.
- Member communications, both initial and ongoing:
  - Initial communications to include welcome letter; club rules, dress code, club governance and committees; new member handbook; frequently asked questions; and who to contact information
  - Ongoing communications to include club newsletter; website content; and general manager's and department heads' letters to the membership.
- List and describe all the club's major touch points with members, department by department.
- Wow factors – how they are developed and used to surprise and impress members.
- Member appreciation events and actions.
- Calling programs and ongoing member surveys, describing purpose, methods, and uses.
- Use of Member Preference/Feedback forms to build and enhance member profiles.
- Wowing member guests – explains and describes the special efforts and methods the club will take to impress members' guests.
- What actions the club will take in extraordinary circumstances such as when a member has a family tragedy, golfers errant shots damage member's course-side property, member accidents at the club, etc.
- Congratulating members for accomplishments/promotions/new jobs/business or community awards & recognition.
- Preparing the general manager's routine member correspondence for signature, such as birthday wishes, recognition of honors and awards, anniversary recognition, thanking members for club service and patronage, etc.
- The use of photographs at club events and activities and providing members digital copies of photos on request.

## **Responsibilities Related to Staff Training**

Describes and assigns responsibilities for developing and delivering the following employee training:

- Member focus and club etiquette
- Organizational values and culture of service



- Touch points
- Daily huddles
- Member engagement
- Rendering assistance
- Service recovery
- Problem solving
- Employee empowerment

As can be seen from the above, the Member Relationship Management Plan describes all elements of the club's efforts to build stronger relationships with its members and their guests. As such it is a living document that will change with the evolving nature of those relationships and the innovations and ideas of club management and employees to continually improve the program and render higher and better personalized service to its members.

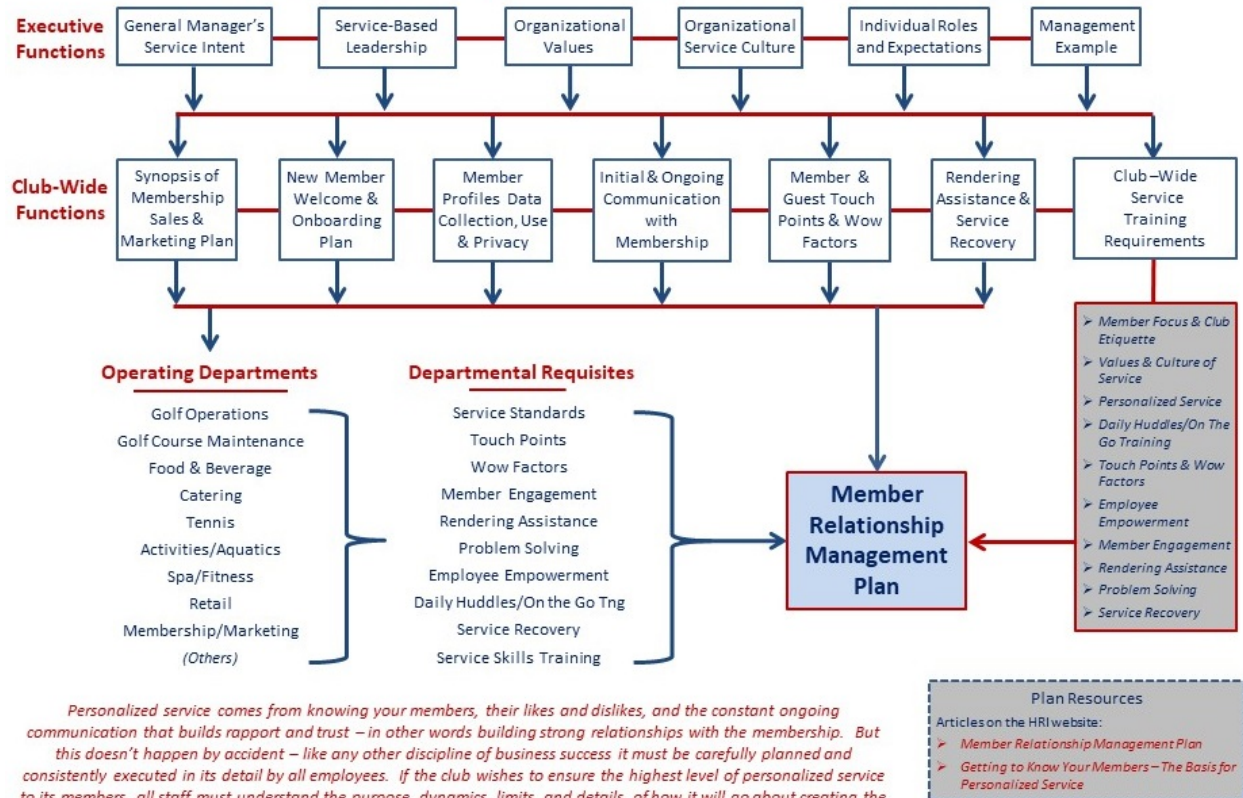
The Member Relationship Management Plan should be reviewed annually by the general manager, the director of member sales and relationships, and all department heads in a joint meeting; the purpose being a never-ending quest to provide higher and more innovative levels of member service and engagement.

Bottom line: If the club wishes to ensure the highest level of personalized service to its members, all staff must understand the purpose, dynamics, limits, and details of how it will go about creating the necessary relationships with its members.



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## The Club Membership Director and Member Relationship Management Program

A typical club mission statement says that the club must “exceed the expectations” of members. But how can employees exceed expectations if they don’t know what those expectations are? A more realistic mission statement would be to “understand and exceed the expectations” of members.

This need to understand the changing expectations of members requires that management continually “take the pulse” of the membership by any means available. This includes intensive personal contacts, management calling programs, membership meetings, various member or advisory boards, surveys, comment cards, analysis of members’ club usage and spending habits, as well as ongoing feedback from employees about the receptivity of members to the club’s offerings and individual member preferences.

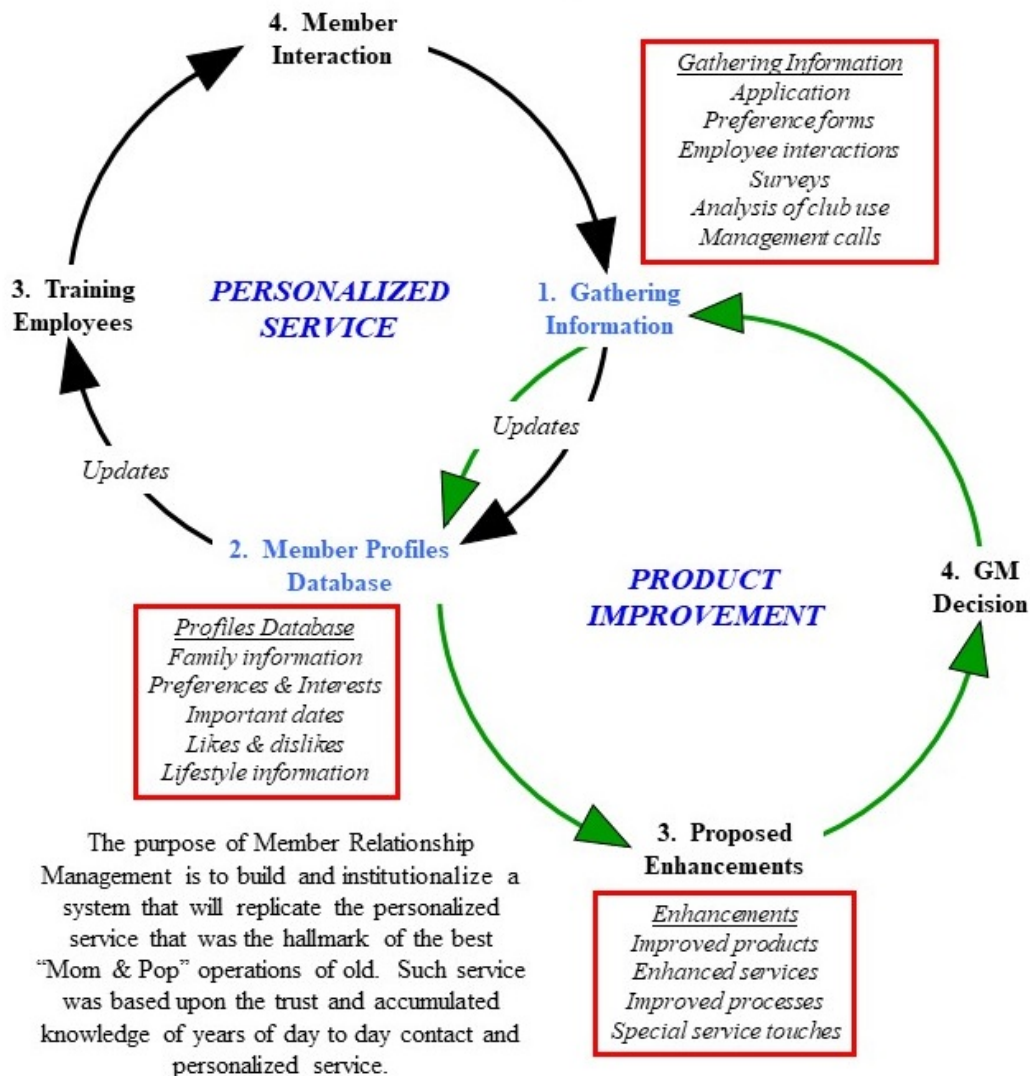
Not only must this information be obtained, but it must be processed and analyzed. Only then can management and employees effectively exceed the expectations of the club’s membership.



This process of understanding members' expectations is achieved by building strong member relationships. What is being attempted is to build and institutionalize a system that will replicate the personalized service that was the hallmark of the best "Mom & Pop" operations of old. Such service was based upon the trust and accumulated knowledge of years of day-to-day interaction with customers.

**MEMBER RELATIONSHIP MANAGEMENT**

**"Romancing the Member"**



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To ensure that the strongest member relationships are built and maintained, it is necessary to place as much focus on member relations as on other critical areas of the club's operations. This can be done by expanding the membership sales position to that of a director of



membership sales and relationships – a single director who oversees all areas of member relations.

Over the years I have often heard that the role of “selling” memberships is so critical that membership directors cannot be burdened with extraneous duties – they must focus solely on the challenge and disciplines of selling. While recognizing the importance of the sales effort, I would argue for a broader interpretation of successful selling.

In any community there is no greater or more effective sales pitch than the recommendation of satisfied club members. After all, they move freely and interact frequently with just the demographic any club seeks – the successful and affluent members of the community. Despite a club’s comprehensive marketing plan and the focused execution of that plan by a competent membership director, the reputation and word of mouth endorsement of your club will sway far more prospects than any amount of cold calling and repeated sales contacts.

Recognizing the paramount importance of the club experience in attracting new members, I expect the membership director to be just as involved in the club’s efforts to provide value and service as the rest of the management team. In addition to working with the membership committee, engaging prospects, and signing up new members, I want the membership director to create and implement a robust member relationship management program.

To encompass these larger responsibilities, I would add the following duties to the membership director’s position description:

- Develop a Member Relationship Management plan describing all steps the club will take to foster stronger relationships with members.
- Establish and maintain the Member Profiles database.
- Create and conduct specific training for the club’s management and staff to include member focus training to describe the club’s absolute commitment to member service and satisfaction, as well as club etiquette training for all employees.
- Analyze members’ club use data to better understand members’ wants and needs.
- Benchmark, analyze, and report the top and bottom 20% spenders at the club on a monthly basis.
- Create and implement a rewards program for top 20% spenders. Develop and implement plans to encourage more use of the club by the bottom 20%.
- Regularly distribute member profile information to staff to help foster enhanced personalized service to members.
- Manage and prepare routine general manager’s member correspondence for birthday wishes, recognition of honors and awards, anniversary recognition, thanking members for club service and patronage, etc.
- Chair Member Relationship Committee of key club department heads which meets monthly to discuss and resolve member relationship and service issues while continually improving the details of the Member Relationship Management Plan.



The member relationship management program is designed to foster more meaningful relationships with all club members, but this can only be accomplished thoroughly and efficiently when well-planned and implemented by a single responsible individual – the club’s director of member sales and relationship.

A final thought: Given that all club revenues come from members, shouldn’t as much effort be placed on encouraging their use of the club as any other discipline of club management?

## **Appendix - Getting to Know Your Members**

Gather specific data that will help the club provide personalized service to each member and family. Define the data to be collected and get the board’s approval and support in tracking this information.

Types of data to collect include:

- a. Names, titles, institutional or business positions, honorifics.
- b. Photo of each family member if possible.
- c. email addresses.
- d. Personal accomplishments - universities attended and degrees, awards and honors, promotions and assignments.
- e. Business, church, and professional association affiliations.
- f. Lifestyle interests such as specific sports and teams, activities, philanthropy and causes, hobbies, etc.
- g. Club leadership and committee positions held and dates of service.
- h. Celebratory dates - birthdays, wedding anniversaries, anniversary of club membership.
- i. Food and beverage preferences; dietary restrictions; food allergies.
- j. Pro shop preferences - brands, sizes, colors, equipment.

Collected data falls into two categories based upon its intended use:

1. Information to be used by the general manager and department heads to acknowledge and recognize members, as well as to foster meaningful member engagement and conversations - data a. through h. above.
2. Information to be used by line employees in providing personalized service - items a., b., and g. through j. above. The purpose is to provide staff with the information to recognize and address members by name and title, provide personalized service by anticipating needs, while avoiding inappropriate familiarity.

Collect as much information as possible on the membership application. The application should clearly state the reason for collecting the information - that is, to provide a more personalized service - and that completing this information is optional. Have a check off block for each of the data types above to allow members to designate what is OK to collect. The application should also provide a check-off block indicating that the member does not want any data collected.





Methods to data collection for existing members include:

- Using Member Preference and Feedback, PCPM Form 486, (available on PCPM Forms at the PCPM Marketplace Store) filled out by employees whenever they observe or note a member preference - such as how they take their coffee or their favorite beverage - or any feedback they receive or member comments overheard. These completed forms are then sent to the Member Profiles Manager - the person responsible for maintaining the member profiles database.
- Analyzing member purchases in pro shops or food venues. This should be done by the department heads for their own areas of the operation and provided to the Member Profiles Manager.
- Internet searches have the potential of yielding useful information as well as photos for those members with a significant Internet or social media presence. This can be done routinely as time permits by the club's administrative assistant, by some other designated individual such as a concierge, or as a summer project for an intern.

### **Cataloguing and Sharing Information**

Utilize your club management system software to record key information about your members if such a database is available. Each club will have to evaluate the availability, effectiveness, and ease of use of this feature.

As an alternative, build your own database using MS-Access or MS-Excel by setting up standardized files which can be replicated (Save As) and filled out for each member. Photos can also be inserted in these files and information aggregated by family member and type of data. As a convenience to properly share the information, the individual member file should be designed to segregate that information designated solely for use by line staff.

Recognize and protect the privacy of members by honoring their designated privacy wishes and controlling data collected by password protected access to the files by a limited number of designated individuals authorized to enter information in the database.

The responsibility for cataloging and sharing the member information collected will depend on the organizational makeup of individual clubs, though the following suggestions are offered:

- If workload and staffing permit, make the office of the club's membership director responsible for compiling member data. This works best when the membership director has an assistant who can handle the daily administrative task of entering collected data. In this situation, the membership director has ultimate say as to what information is and isn't appropriate to enter into the database.
- An alternative is to have the club's administrative assistant maintain the database and make ongoing entries under the supervision and discretion of the general manager.

Three tools are recommended to share data with those who need it.

1. The Member Profiles Manager sends out email alerts to department heads when a new member joins so that the member's data can be reviewed by all departments. Alerts can also be used to provide important or time-sensitive news or information relating to



existing members. Department heads can then access the individual member's file to review the information and share it with employees as appropriate.

2. Some sort of Daily Huddle or pre-shift meeting is an ideal time to share member information with line staff. Another tool to share data is by using a shift log to distribute information.
3. Department heads should direct their employees to check dining reservations and tee sheets on a daily basis and then refer to individual member profiles to remind and refresh themselves regarding member names and preferences.

*About the Author*

Ed Rehkopf is a graduate of the U.S. Military Academy and received a Master of Professional Studies degree in Hospitality Management from Cornell's School of Hotel Administration. During his long and varied career, he has managed two historic hotels, managed at a four-star desert resort, directed operations for a regional hotel chain, opened two golf and country clubs, worked in golf course development, and launched a portal web site for the club industry.