

The Advantages of Hiring
The Boothe Group...

To Manage Your Club's
Evaluation, Selection and
Implementation of *New Club
Management Software!*

Proven Process

We have conducted hundreds of these projects for private clubs. That experience has helped us develop a thorough and effective process that **assures your club will make the proper selection decision.**

Your Staff has limited experience in evaluating, selecting and implementing club management systems.

Project Management

This is what we do for a living. We stay focused on your project and make sure that all steps of the process are carried out **properly and on time.**

Your Staff has limited time available to focus on a project of this magnitude.

Specialized Tools

We have developed specialized assessment tools that assure your club's **special needs are identified and documented** in a personalized software specification.

Clubs have a difficult time creating a proper specification. In most cases they use a very limited list of features, or no list at all.

Club Master - Software Functional Specification

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Club Master Software Specification - 1-18-17.xlsx

Our
specification
includes 20+
applications and
more than
1,500 items.

TBG The Boothe Group, LLC	
1	
2	Club Master - Software Functional Specification
3	
4	Website
5	Feature # Description
11	6.00 Sort member roster by member category, interests, groups, etc. Include a flexible events calendar feature that allows members to make
12	7.00 reservations from the calendar.
13	8.00 Maintain multiple calendars.
14	9.00 Allow a calendar event to be added to multiple calendars.
15	10.00 Ability to display the club calendar.
16	11.00 Include a robust and attractive photo gallery. Provide a user-friendly photo gallery that
17	12.00 allows batch uploading and downloading.
18	13.00 Document management: Provide document archiving, document search, document
19	13.10 publication start and end dates, and document approval by administrator.
20	13.20 Search on document content.
21	14.00 Provide "message board" and notification to administrator when new messages are posted.

Each application includes a detailed list of specifications.

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1	
2	Club Master - Software Functional Specification
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4	Food & Beverage POS
5	Feature # Description
14	3.10 Allow entry of menu preferences and allergies. Membership.
15	3.20 Automatically generate menu item preferences. include prep instructions.
16	3.30 Allow server to display menu item descriptions. common allergic items such as flour, peanuts, etc.
17	3.40 Warn server if menu item ordered contains allergen.
18	4.00 Order Entry: Allow checks to be opened without assigning a server. easily access these checks by table number.
19	4.10 server.
20	4.20 Allow order entry by course, with the ability to add or delete items.
21	4.30 Allow entry of gender for each seat, and print seating chart.
22	4.40 Allow order line items to be edited or deleted.
23	4.50 Allow a previously entered item to be modified.
24	4.60 Provide "ekin seat" feature during order entry.

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1	
2	Club Master - Software Functional Specification
3	
4	Member Billing & Accounts Receivable
5	Feature # Description
13	5.00 Billing responsibility - include the following elements: Consolidated billing - combine all amounts due from all family members into a single statement.
14	5.10 Single statement with breakout of individual billing information - include all charges from all family members, segregated by individual family member.
15	5.20 Individual billing - allow individual family members to receive a statement with only their amounts due.
16	5.30 3rd Party billing - allow a 3rd party to receive a consolidated or individual statement (i.e. corporation paying member statement).
17	5.40 Member account inquiry - include the following elements: Easy access to current and past month statements. Display of statement details as presented on the original statement sent to the member.
18	6.00 Drill-down to POS check detail for each applicable transaction.
19	6.20 Email statement to member.
20	6.30 Email all or individual POS check detail to member.
21	6.40 Dues and Recurring Charges - include the following elements: Default dues and recurring charges assigned by member category; automatically assigned at new member set-up.
22	6.50 Unlimited user-maintained dues and charge types.
23	6.60 Assignment of unlimited dues and charge types to an individual member or family member.
24	7.00
25	7.10
26	7.20
27	7.30

Structured Evaluation

We use your personalized software specification to structure the vendor software demonstrations. That **helps reveal** whether each special requirement can – or cannot – be satisfied by each vendor.

With a limited list created by your Staff, they will be hard-pressed to differentiate between the systems they evaluate.

Software Enhancements

If custom enhancements are required for your club, we will create a specification for each, negotiate pricing, monitor the design and development, and test each enhancement to **assure it meets your club's specific requirements.**

Your Staff has limited experience with software development and will be challenged to manage this process successfully.

Contract Negotiations

We are thoroughly familiar with the pricing of all club management software systems and services, and can **accurately determine a fair price** for your club to pay. We also know which contract terms and conditions are acceptable and **which ones should not be accepted by your club.**

Pricing information for club management software is not published, and your Staff will have difficulty in determining a fair price.

Basic Implementation

Implementation – we make sure the implementation of your club's software is done **properly and on time** by the selected vendor. We **know the personnel** from each vendor and will choose their best performers for your project. We monitor their performance and **demand their best.**

Your Staff must carry out their full-time jobs during the software implementation. Typically implementation creates plenty of additional hours – without the added responsibility of managing the implementation process.

Advanced Implementation

We require the vendor to **perform additional work**, such as pilot testing, to assure that your implementation goes smoothly.

Your Staff has no access to these proprietary tools or processes.

Testing Activity	Number of Repetitions	Date Completed	Initials	Comments/Issues
Order Entry				
1. Order entry including: a. search for member account by partial last name. b. search for member account by member number. c. confirm that family member names are available on lookup screen. d. review member information available including name, account number, member class, dependent names and ages, member photo and signature, account charge status, preferences. e. open checks for members using seat numbers. f. enter basic check with 2-8 covers, food and beverage items, modifiers. g. confirm that modifiers operate properly and test pop-up keyboard entry. h. close check to member account. i. review check for completeness and accuracy including sales tax and gratuity.	100			
2. Open checks to multiple member accounts up front (if applicable).	5			
3. Enter member preferences from POS.	5			

Sample Pilot Testing Checklist for F&B POS – entire checklist is 8 pages. We have developed Testing Checklists for all of the key software modules. **This is an exclusive TBG tool.**

Data Conversion

We will determine which data from your existing system is converted electronically and **assure that the data converted is correct and useful**. We will also monitor the manual entry of data by your staff.

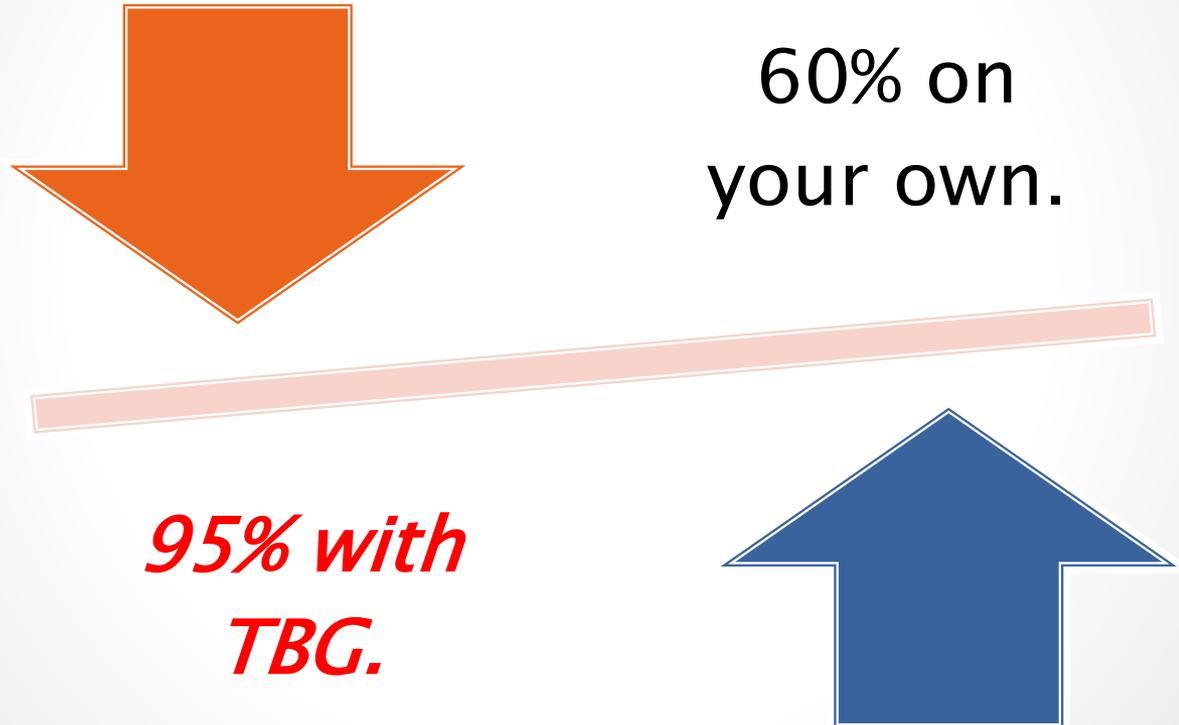
Your Staff has limited time and experience to carry out this task.

Hardware Assessment (optional)

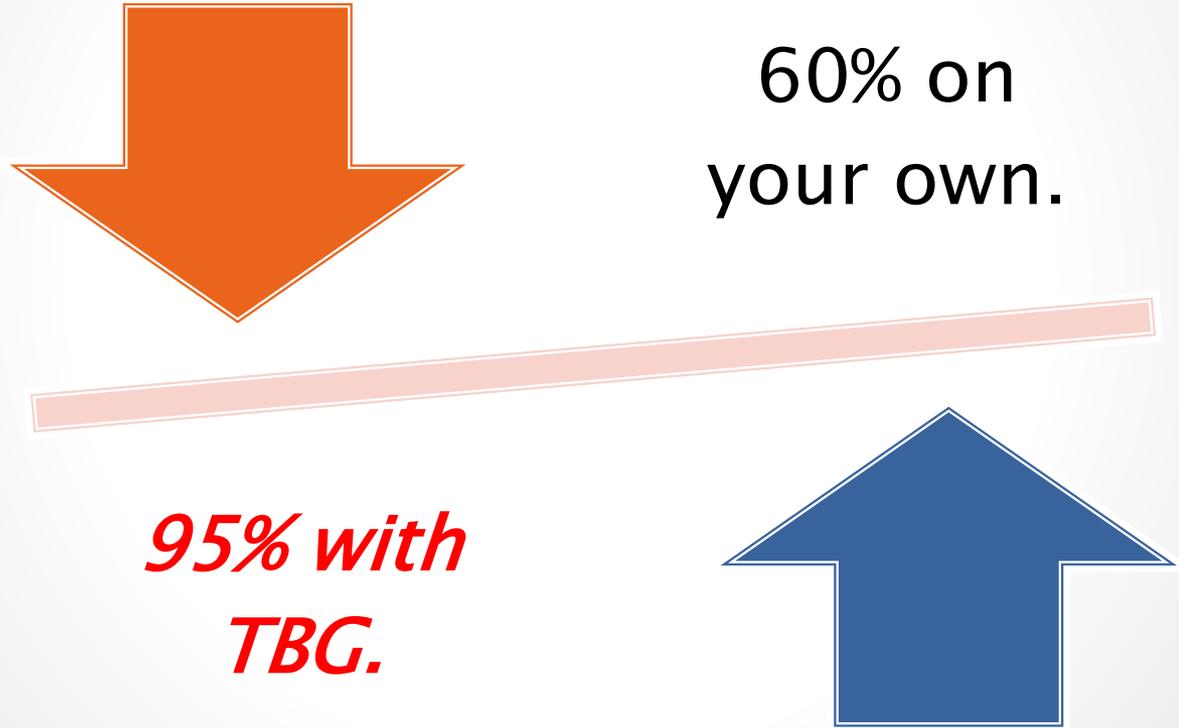
Our certified technicians will **evaluate the suitability of your existing hardware** for use with new club management software. We will work with your local IT support company to assure that any new hardware is priced, configured and installed properly and on time. (This is an optional service.)

Your Staff has limited time and experience to carry out this task.

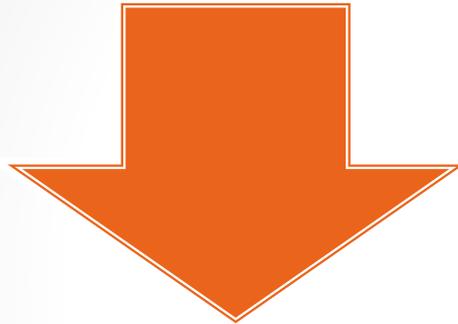
Percent of Key Software Requirements Identified and Evaluated...



Percent Utilization of the New Software...



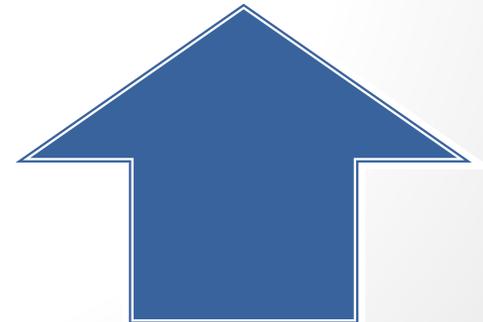
“Break-In” Time...



2 Years on
your own.



1 Year with
TBG.



TBG The Boothe Group, LLC

Helping Private Clubs Become
Educated Technology Consumers



We help private clubs understand computer technology, make good decisions...



and receive the highest value from their technology investment.