

Microsoft CRM Provides 360 Degree View of ClubLink Members

Solution Summary

ClubLink Corporation owns and operates 35 golf clubs in Ontario and Quebec with a total of over 15,000 members. They are a unique company that requires non-standard software applications to manage the various aspects of their business. ClubLink has to concern itself with standard golf course management, however due to its large membership and unique multi-course play feature also have unique requirements for member billing and the tracking of revenue across multiple locations, banquet and wedding co-ordination across their clubhouse facilities and event management. Managing a single member's interaction with the company across all of these various interaction points is a challenge. Working with LegendCorp, ClubLink built the foundation for their Member Services practice using Microsoft CRM. Using the Service module as the core piece of the solution, LegendCorp integrated Microsoft CRM to the existing Dynamics SL accounting system to enable Member Services staff to view all of a member's information with one click of the mouse. CRM is also integrated to MOSS 2007 to store member documents and future integration will include Office Communications Server to expedite collaboration around a member issue.

Environment before Microsoft CRM

ClubLink Corporation is a unique business in the Canadian market in that they operate 37 golf courses throughout Ontario and Quebec, many of which are the highest rated courses in the country. The flagship course is Glen Abbey which is home to the PGA Tour's Canadian Open. Due to the unique nature of their membership management requirements, they were unable to find a satisfactory software application to meet these requirements. Having standardized on Microsoft Dynamics SL as their ERP system, ClubLink decided to work with their long term Microsoft

partner, LegendCorp to custom develop the application. The problems being encountered with the old 'off the shelf' membership system included extensive amounts of manual effort in areas such as member billing and new member application processing. Also, members endured frustrations by having to place numerous calls to the member services staff who would not always have accurate information available to them regarding an issue's status. Tracking down information regarding a particular member would involve emails or phone calls to staff in other departments who would have to investigate and get back to Member Services. This resulted in lengthy delays returning calls to the member. Club members would have two or sometimes three separate membership numbers attached to them which made it difficult for client services staff to provide combined member information and also made accurate membership reporting very difficult.

The logo for ClubLink, featuring the word "CLUBLINK" in a large, blue, serif font.

Technical Solution Overview

LegendCorp specializes in CRM solutions that require customization, integration to back office systems and/or other products in the Microsoft stack such as Sharepoint or Office Communications Server. ClubLink's solution required customized integration to their Membership accounting system, based in Microsoft Dynamics SL as well as some custom workflow oriented at notifying various levels of management when a case is reported of a specific severity level. The solution also required a central area to store all documents relating to an individual member. This was achieved by placing a Sharepoint document library link on each member's contact information page. Several customized reports were developed using SQL Reporting Services to ensure Senior Management receives the most up to date

information regarding member cases – opened and closed.

A future phase will see Office Communications Server linked to a member issue so that anyone viewing a case can see other team members who are involved and quickly connect with them for an update on the situation.

Benefits to ClubLink and their Members

Through the implementation of Microsoft CRM, ClubLink is realizing the value of the 360 degree view of their membership. It used to take up to several days for a member's issue to be resolved – information needed to be gathered from several sources including the accounting department and the facility where the issue originated. With the integration of CRM to the Dynamics SL accounting system, all of the member's transactions are available through a custom dashboard along with notes made by any staff member that may have had contact with that member.

It is important that members feel appreciated by the staff at ClubLink's head office and they can achieve that by tracking details about each member. LegendCorp worked with ClubLink to develop an ideal member profile which included key information about the individual (home course, number of rounds played, family members, corporate affiliation) and their preferences (brand of clubs played, brand of golf balls, culinary likes/dislikes). That way, when a member calls, any ClubLink staff member can be prepared for the conversation just by looking at the CRM contact card.

Next Steps

In the upcoming year, ClubLink will add their new member sales team onto the CRM platform. Future enhancements will also include integration to Office Communications Server and development of an events management application.

For more information regarding the ClubLink CRM implementation or to discuss other capabilities of our CRM team, please call Kevin Oakes at LegendCorp. 416-477-5712 or email

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