

Getting Started on Your Operations Plan

Getting started on writing a club operations plan requires a long-range vision for improving your club, the will to make it happen, and the tenacity to overcome all obstacles to its successful completion. The effort will require the active involvement of all club department heads so convincing them of its importance and the benefits to them personally and their department's performance as a whole is paramount.

Note: While it may be advisable to make the club's board aware of the project, ultimately preparing an operations plan is a matter for the general manager and the club's management team. I personally would not seek their permission; only inform them of what I am doing. There is no great outlay of cost involved; possibly some purchased resources. The main effort is one of time and effort on the part of the club department heads. They may claim they don't have the time, but I don't buy it. It's a matter of priorities, discipline, and time management.

1. The first step is to call a meeting to explain the purpose and [*Elements of an Operations Plan*](#), what it contains, and its benefits to members, management, and staff:

- Improves organization and performance of the club.
- Lessens constant reaction to daily crises.
- Clearly identifies training requirements.
- Gets everybody in a department on the same page.
- Improves inter-departmental cooperation and efficiency.
- Lessens mistakes and rework.
- Allows routine aspects of operation to function routinely, thereby freeing management for strategic initiatives and enhanced member engagement.
- Improves efficiency and performance.
- Increases staff pride and morale in working for a well-organized and efficient operation. As Jim Collins said in his groundbreaking book, *Good to Great*:

“What do the right people want more than anything else? They want to be part of a winning team. They want to contribute to producing visible, tangible results. They want to feel the excitement of being involved in something that just flat-out works.”

2. At the same time, department heads must understand the short-term challenges for everyone involved:

- Requires focus, attention, and careful consideration of what each department does and how it does it. While this sounds difficult and complex, it is founded on the simple premise of describing what it is they do by breaking tasks and desired outcomes down into their basic elements – the standards, policies, and procedures (SPPs) by which they operate – and putting these in writing.

- Requires some degree of writing ability, though those who lack the necessary skills can be aided by using a standard format and provided with assistance where necessary. If a department head can describe a basic sequence of steps in a process, some other designated individual with more appropriate writing skills can draft the SPPs. Literary skills are not required; only the ability to logically and accurately describe standards, policies, and procedures.
- 3. Explain and encourage the concept of incremental progress to overcome objections that “they are too busy” to work on the project. See [Implementing New Initiatives with Incremental Progress](#) for more information. More than anything writing an operations plan requires self-discipline and knowledge. In some cases you may discover that a department head doesn’t fully understand his or her business or the dependency and interplay among departments.
- 4. Assign responsibilities and establish a tentative timeline for progress on the project. Recognize that while most department heads will be able to meet the established deadlines, a few will struggle with the project. In these cases, the general manager will need to make allowances, commit other resources, or seek alternative ways to proceed depending on circumstances.
- 5. Require all department heads to prepare outlines of SPP topics for their functional areas. Provide a sample of topical outlines as a guide. See sample outline of [Golf Course Maintenance SPP topics](#). Initial outlines will naturally be expanded as the project progresses and new topics are perceived or identified. The general manager should carefully review the outlines for any essential topics that may have been missed.

Note: All departments with member interfaces must start with an inventory of their touch points and a thorough description of how employees interact with members, including all policies pertaining to members. Placing top priority on documenting service standards, policies, and procedures, and techniques places the appropriate emphasis on the purpose of the club and its employees. Further, how members are treated will be a significant driver of the substance of other departmental operating SPPs.

The member service SPPs of all departments, when taken together, become a significant portion of the [Member Relationship Management Plan](#) – a crucial element to providing consistent club-wide service. For this reason it’s important that the general manager has previously established the club’s [Organizational Values](#) and culture of service, thereby establishing the standards for member service.

- 6. Review format for SPP presentation. See [Creating Standards, Policies and Procedures](#) for an example. Unless you have some compelling reason to create your own format, use the example – no sense in reinventing the wheel.
- 7. Focus particularly on Accounting and Personnel SPPs because of their club-wide application and significance to the entire operation. See [Two Critical Areas for Policies and Procedures](#) for more information. Other club-wide SPPs include safety, security, administration, training, and large parts of facility management, particularly the standards for maintenance and housekeeping.
- 8. Designate a project manager to oversee and coordinate departmental tasks. I personally feel this project is so important to the club that the general manager should act in this capacity, aided by an administrative assistant. After all, the general manager is the person with widest experience and knowledge and is most likely the best person to understand industry best practices, how various departments should work together, and, therefore, make the best decision when departmental SPPs conflict.

9. As SPPs are drafted they should be reviewed by the general manager and modified as necessary. The review and redrafting process may take multiple iterations before approval. Keep in mind that the process of writing SPPs is a cumulative effort, particularly when they involve multiple departments, that may entail significant modification and enhancement as the many processes of the operation are refined and honed into an even more useful product.
10. Once approved, the individual SPPs should be set up in a Linked Policies Database on the club server. When the project is finished all SPPs and related forms will be available in a digital format in one location, easily accessible by all who have a need to see them. Setting up such a database is easy to do and flows naturally from the original departmental outline of SPP topics. For more information see [*Setting Up a Linked Policies and Information Database at Your Hospitality Operation*](#).
11. Once the original project is completed, the operations plan should be reviewed and updated in its entirety at minimum on an annual basis or more frequently as part of Continual Process Improvement. As each cycle of review and enhancement takes place, the task becomes easier. As more and more of the operation's process are documented, more and more of the operation becomes formalized and in sync with other portions. In this respect everyone must understand that an operations plan is a living document, describing in detail a living organization that continues to change and evolve in a never ending quest to provide better value and service to members.

Prior to starting on this significant project, I would strongly recommend you check out the many operational resources on the Hospitality Resources International (HRI) website.

- HRI has written a series of 175 Accounting Standards, Policies, and Procedures (SPPs), along with 47 related forms, which it sells for \$495 on a CD. Each individual file is provided in MS-Word or Excel, allowing for customization by each club.
- HRI also offers a CD with 157 Personnel Standards Policies and Procedures and 45 related forms for \$495. As with the Accounting SPPs, these can be customized by each organization.
- For those operations that have neither the time nor expertise to customize the SPPs, HRI offers writing and editing services for \$40 per hour. Most operations using this service find that after purchasing either accounting or personnel CD, they will spend an additional \$2,000 to \$3,000 for the customization depending upon the extent of the revisions – with the total cost in the range of \$4,000 to \$5,000 – certainly a small price to pay for professionally written SPPs formalizing your operation's specific HR or Accounting functions.
- Clubs interested in purchasing either CD can view samples of each by following these links:
[Sample Accounting Standards, Policies, and Procedures](#)
[Sample Personnel Standards, Policies, and Procedures](#)
Contact us at <mailto:info@hospitalityresourcesinternational.com> to find out more about HRI's writing/editing services.
- Lastly, HRI has a number of no-cost downloadable SPPs for Golf Operations, Food and Beverage, Club Organization, Activities and Aquatics, and Safety, along with their respective outline of SPP topics. These free resources will be a most helpful starting point for those department heads.

Creating a fully-integrated club-wide operations plan is a major undertaking. Though finishing the project will give you an invaluable resource for your club for the remainder of its life and make every

person involved a far stronger manager, there is significant value in whatever portion you do complete. As Jim Muehlhausen says,

“The power of an operations plan is that you most likely do NOT understand your business systems at the beginning of the process, but you WILL understand them by the time you are done . . . Doing an operations plan will force you to refine and tighten your processes. It will also point out your ‘holes’.”

I encourage all those general managers who are serious about creating an operations plan to “damn the torpedoes and full speed ahead.” It will be one of the more important and meaningful things you will do in your professional career.

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