



Case Study

“This has made my life easier.”

XLerant Case Study A Smarter and Faster Way to Budget for Clubs using BudgetPak

Managing a club's finances isn't just about balancing the books—it's about preparing for an unpredictable, seasonal business while keeping operations running smoothly. Many clubs have long relied on spreadsheets to manage their budgets, but as club finances grow more complex, Excel simply can't keep up.

This case study explores how several clubs across the U.S. made the switch to BudgetPak, moving away from frustrating, error-prone spreadsheets to a system that saves time, improves accuracy, and makes budgeting easier for everyone involved.

Clubs like Philadelphia Cricket Club, Cincinnati Country Club, Sawgrass Country Club, Eagle Creek Golf and Country Club, and Elevate Technology face a unique financial challenge: balancing a mix of full-time, part-time, and seasonal employees while managing fixed and variable expenses, and revenue streams from memberships, dining, events, and golf operations.

With so many moving parts, financial planning must be precise, flexible, and easy to update. However, for years, clubs relied on traditional spreadsheets that made budgeting more difficult than it needed to be.

The Problem – Why Excel Wasn't Enough

For most clubs, budgeting with Excel was a tedious, manual process that left too much room for error. Finance teams spent hours creating and distributing spreadsheets, tracking down broken formulas, verifying numbers, and consolidating multiple spreadsheets for reporting. Even the smallest mistake—like a deleted formula—could throw off an entire budget.

In addition to being inefficient, spreadsheets made it difficult to get department heads engaged in the budgeting process. Many weren't comfortable using Excel, and without an easy way to collaborate, budgeting often became the sole responsibility of the finance team.

“I spent the majority of my time during our 4-month budget process checking and rechecking and making sure the numbers are correct and rolling up properly. I couldn't do any analysis because I spent so much time on the spreadsheets.”

Handling payroll was another challenge. It is very difficult or impossible to budget by individual employee using a spreadsheet. Clubs needed to account for fluctuating seasonal staff, multiple pay rates, different benefit structures, and taxes. Excel isn't designed to offer a simple way to manage these variables. Forecasting was equally difficult, as running multiple budget scenarios required manually adjusting figures in multiple files.

The Evaluation – Searching for a Better Approach

Recognizing the need for a better system, club finance teams began evaluating budgeting solutions.

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I was looking for a system that I didn't have to worry about...with the service that we expect.

”

Generic financial software programs failed to meet the needs of a club. They either lacked flexibility, required extensive customization, or were too complex for non-financial managers to use effectively. BudgetPak stood out because it was designed with the club industry in mind. It

offered an intuitive interface, easy driver and calculation setup, built-in forecasting tools, and seamless payroll budgeting—all backed by a support team that understood the unique financial challenges clubs face.

The Solution – How BudgetPak Made a Difference

After switching to BudgetPak, these clubs quickly saw major improvements in their budgeting processes. The biggest changes were time savings and accuracy. With all budgeting data centralized in one platform, finance teams no longer had to worry about formulas breaking or numbers failing to add up correctly.

“ The knowledge of the club industry and drivers--that was a big component of getting collaboration among the departments. This time around, doing the budgets with BudgetPak was much easier. Department heads were engaged. ”

Headcount planning also became much more efficient. BudgetPak allowed clubs to accurately plan labor costs by tracking headcount allocations, seasonal staff fluctuations, multiple pay rates, benefits, and taxes. Instead of relying on estimates or applying a blanket percentage increase to wages, clubs could now plan staffing budgets with precision.

Department heads, many of whom had struggled with Excel, found BudgetPak easy to use. They could enter their own budget information directly into the system without needing extensive training, which led to greater accountability and a more collaborative approach to budgeting.

The ability to run multiple budget scenarios in real time was another game-changer. Instead of spending hours manually adjusting spreadsheets, finance teams could quickly create and compare different financial models and make informed decisions about everything from membership levels and fees to their workforce balance, pay increases, and benefit changes.

The Results – Time Saved, Better Accuracy, and More Confident Decisions

The impact of BudgetPak was immediate. Budgeting cycles that once took months were cut by 66%, allowing finance teams to spend less time consolidating spreadsheets and more time analyzing financial trends.

Accuracy improved as automation eliminated formula errors and manual entry mistakes. With reliable data, club leaders felt more confident in their financial decisions.

Department heads became more engaged in the budgeting process, leading to better collaboration and stronger

accountability across all departments. By providing a system that was easy to navigate, BudgetPak encouraged participation from every level of the organization.

“ The staff has embraced the change. They said it was easier to use than Excel. ”

Forecasting also became more reliable. Clubs were able to anticipate financial shifts and adjust budgets accordingly, giving them a clearer picture of both short-term and long-term financial health.

“ The number one thing for me was the scenarios--the ability to basically, in the blink of an eye, create a different scenario without having to take 8 hours to rebuild the ship. That really was a selling point for me. ”

Conclusion

For clubs, budgeting isn't just about numbers—it's about making informed decisions that keep operations running smoothly while planning for the future.

BudgetPak has helped clubs replace the stress and inefficiencies of Excel with a system that is accurate, easy to use, and designed specifically for their needs. By eliminating spreadsheet errors, improving collaboration, and simplifying headcount planning, clubs can now focus on strategic financial planning instead of suffering with spreadsheets.

As one finance leader described it:

“ I don't have to worry about whether everything's flowing the way it's supposed to, because it just does. This has made my life easier. ”

BudgetPak™
by XLERANT

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