



River Oaks Country Club

“My advice to any club CFO still on Excel: just take a look. It costs nothing to explore, but the time, labor, and money you save could be significant.”

Trading Spreadsheet Chaos for Accuracy and Confidence

Founded in 1923 and originally designed by Donald Ross, River Oaks Country Club is one of Texas’ most storied private clubs. Set on 183 acres in the heart of Houston, it ranks #14 in the Platinum Club of America and #64 globally among the world’s top golf and country clubs — and was recently inducted into the Texas Golf Hall of Fame as its historic course honoree. The Club operates year-round, serving approximately 1,650 members.

LaRanda Burke, CPA joined River Oaks as CFO in April 2024, bringing accounting experience across corporate and nonprofit sectors. Her arrival came at a pivotal moment — budget season was approaching, and the financial infrastructure she inherited was overdue for transformation.

The Problem – A Spreadsheet Inherited, a Process Undefined

When LaRanda arrived at River Oaks, she inherited an Excel-based budgeting process built and maintained entirely by her predecessor. A massive multi-tab workbook was distributed to department heads for the 16 different departments each August, then manually consolidated into a master file — and only the previous CFO knew how it was all supposed to flow together.

The risks were clear: broken links, formulas with hard coded numbers, missing data, and no institutional knowledge to fall back on. LaRanda faced three choices—scrub and fix the existing workbooks, build one from scratch, or find an automated solution. She evaluated all three not by what would save time immediately, but by what would create lasting efficiency for her team, her department heads, and the Club.

“There were a bazillion tabs. I had already discovered sheets with errors. I thought— if there’s one, there’s more.”

With budget season scheduled to begin in August and no runway for delay, the pressure was real. But LaRanda was methodical: “Which one is going to be worth my investment of time and end up creating a better long-term solution?”

The Evaluation – Finding the Right Fit

LaRanda demoed multiple platforms and consulted peer CFOs before selecting BudgetPak. Four criteria drove her decision:

Ease of implementation. With a tight timeline—she identified the solution in July and needed to launch budgets in August—BudgetPak stood out for its speed to configure and its learning curve.

Employee-level headcount budgeting. A non-negotiable: the ability to budget at the individual employee level — with benefits and taxes — not just a blanket salary percentage increase. BudgetPak delivered.

Pricing. One competing solution was impressive but, in LaRanda’s words, carried an “extremely unattractive” enterprise price tag. BudgetPak fit the Club’s needs without overreach.

Support: Accurate and timely issue resolution is a blind spot many don’t think to ask about — until they need it.

She also advises any club leader evaluating software to involve their team early: “When you bring them into the process on the front end, they’re going to be more open-minded.”

“Planning is the phase people rush, but it’s the most critical step. Get it right, and implementation flows smoothly all the way through execution.”

The Solution – From Workbook to Workflow

Implementation kicked off in August and took approximately five weeks, with BudgetPak going live for managers in mid-September — right on schedule. The headcount planning process translated smoothly from Excel into a more structured, reliable environment.

The real-time capabilities changed how LaRanda worked with leadership:

“ I would make a change and the GM could quickly see what it would do to the bottom line. I didn't have to say, 'I'll go fix it in Excel and come back tomorrow.' It was right there. ”

The result: a preliminary budget presented to the audit and finance committee in November, and a final approved budget delivered in December — ahead of the timelines the Club had seen under the previous process. In year two, LaRanda collaborated with the BudgetPak team to refine drivers, tighten expense configurations, and plan for a major \$37 million renovation project.

“ The XLerant support team was very helpful in making recommendations, especially in year two when I understood more about the club and the product. ”

The Results

The impact has been multi-faceted.

“ The Department heads were excited to have something that was going to make their lives easier and make the process more efficient. ”

Greater confidence in financial output. *“Excel can still have errors no matter how diligent you are.”*

Faster, cleaner board presentations. Refreshable reports eliminated manual reconciliation, allowing the finance team to present polished, accurate results on a tighter timeline.

Department head accountability. Line-item detail has raised the bar on budget quality. *“You're at more risk of having your budget cut if you don't have detailed justification.”*

Institutional knowledge transfer. Perhaps the most underappreciated benefit: the budgeting process is no longer locked inside one person's head.

Budget approved on time—ahead of prior years. The Club achieved final budget approval in December ahead of schedule with considerably fewer versions than in previous years.

Conclusion

Adopting BudgetPak was not simply a technology upgrade — it was a strategic commitment to accuracy, accountability, and long-term efficiency. Stepping into a new organization with an inherited, undocumented process, LaRanda Burke made a deliberate choice to invest time on the front end to build something that would serve the Club for years.

The result is a budgeting process that is faster, more accurate, and no longer dependent on a single individual. Department heads are more engaged, leadership has greater confidence in the numbers, and the finance team has shifted from maintaining a process to delivering insight.

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BudgetPak™

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XLerant | 203.883.4380

info@xlerant.com | www.xlerant.com