



THE COUNTRY CLUB OF FAIRFAX

“BudgetPak just fits the way clubs actually work.”

From Manual to Modern: Faster, Accurate, and High User Adoption

Founded in 1947 as the Courthouse Country Club and later renamed The Country Club of Fairfax, is a private club located on the outskirts of Washington, D.C. With approximately 650 members, the club offers golf, dining, and recreational facilities in a competitive suburban market.

Leading financial operations is Controller Kelly Key, whose background spans corporate finance, financial reporting systems, and HR—bringing a process-improvement mindset to the club. When she arrived, she quickly identified budgeting as a key area where the club was falling behind.

The Problem - Fragile Spreadsheets and Manual Rework

Budgeting at Fairfax relied on a collection of department-level Excel spreadsheets built by the previous controller. The process was labor-intensive and prone to error. Preparing the annual budget required copying and pasting large sections of prior-year P&Ls into spreadsheets—a “crazy amount of work.” When accounts were added or changed, they were easily missed in the roll-up.

Department heads also submitted budget narratives through a separate Word document—updated manually each year,

then sent back to finance, where Kelly had to copy assumptions into the master Excel file. The process was disconnected and duplicative.

For Kelly, accustomed to enterprise-grade financial reporting tools—Oracle, PeopleSoft, Hyperion—the club’s budgeting process stood out as an area urgently in need of improvement. “I knew we needed something better,” she said. “I didn’t have a tool for it.”

The Evaluation - Recognizing the Right Fit Quickly

Kelly discovered BudgetPak through an email outreach and signed up for a demo. She quickly concluded that BudgetPak could address the club’s core needs: department-level budgeting with a guided, non-Excel interface that non-financial managers could actually use.

what doesn’t. I could look at it and see.” Having planned the purchase into the budget in advance, she moved forward.

One question clubs don’t always think about asking is: how responsive is the team after the sale? For Kelly, the answer—and the track record that followed—proved to be one of BudgetPak’s strongest differentiators.

The Solution - A Fast Implementation with Room to Grow

“We purchased BudgetPak in November and started implementation right away. We were able to present our budget and get it approved by the end of March.”

The club deployed BudgetPak across approximately 10 departments. Department heads were trained through a combination of live sessions and recorded follow-ups. The system’s step-by-step guided interface was key to adoption.

BudgetPak enabled individual employee-level compensation budgeting, including 401(k) and bonus allocations, which had not been possible in Excel. Budget narratives, previously scattered across Word documents and spreadsheets, were now entered directly within the system—available at a glance without hunting through files.

“Most managers took to it quickly, including those with little budgeting experience. I love that BudgetPak led them step-by-step and the system handled the rest. They couldn’t break anything.”

“BudgetPak allows us to enter notes and line-item detail for accounts. This is perfect for justifying expenses and easy to report on.”

The Results

The impact of BudgetPak at Fairfax Country Club has been felt most directly in three areas: time savings, accuracy, and user adoption.

“Time savings were immediate.”

The manual cycle of copy-pasting actuals, updating multiple spreadsheets, and consolidating data is a thing of the past. When department heads revise their budgets, Kelly can simply refresh the consolidated view.

Accuracy improved across the board. One standout improvement was in detailed employee-level payroll planning that was previously managed only at a department-wide level. The ability to have real-time updates mean that when assumptions change, the financial impact is visible immediately—without the risk of broken formula links or

missed roll-up entries.

User adoption exceeded expectations. Most department heads—including those with limited technology comfort—engaged with the system easily.

“My greens superintendent came to me saying he'd been thinking about the budget and was ready to go. I had to tell him — I'm not ready yet. That's when I knew we had real adoption.”

Support quality has been a consistent point of praise. Kelly frequently highlights her experience with her BudgetPak customer success contact. In an industry where vendor support often takes 24 to 48 hours, XLerant's responsiveness stands out.

Looking Ahead – Board Reporting & Forecasting

Kelly's near-term goal is to move BudgetPak beyond an annual budgeting tool and into the club's ongoing reporting workflow. Using the Excel add-in, myXL, she plans to rebuild the monthly 32-page board P&L in a format that refreshes automatically from BudgetPak data.

She also sees opportunity in forecasting. With actuals already loaded monthly, running forecasts would require minimal

additional effort. Getting the department heads involved would help them become more accountable and take more ownership of their budget throughout the year. Now in its second budget cycle, the club is beginning to expand its use of BudgetPak. As Kelly put it:

“There is so much potential I haven't tapped into yet.”

Conclusion

For The Country Club of Fairfax, BudgetPak solved a concrete problem: replacing a fragile, manual spreadsheet process with a system that department heads could actually use—and that finance could trust. The result has been fewer errors, less manual rework, and a meaningful shift in how the club approaches its annual budget.

For Kelly, who has worked with enterprise financial systems throughout her career, BudgetPak stands apart not just for what it does, but for the support behind it. And in an industry where technology investment has historically lagged, it represents a meaningful step forward.

“I tell my peers that this is the single best thing I've done for my job. And for the department heads? They just drop in a number, and the system does the rest. I don't know why anyone would stay in Excel.”

BudgetPak™
by **XLERANT**

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