



# Introducing... Summit

The essential club operating system to support  
data-driven leadership across every aspect of your club





## Summit positions club leaders at the highest vantage point, where clarity and direction align and the path to long-term success is in sight

**Summit** is a comprehensive operating system for private clubs—delivered through the Club Benchmarking VISTA platform—that unifies data, voices, and vision to drive consistent outcomes and long-term alignment of all club stakeholders. It aggregates and analyzes feedback from member-owners, volunteer leaders, and staff, using a common set of Key Performance Indicators that apply to every club. With Summit, clubs cut through opinion and “the cult of personality” that too often rules in clubs to set clear objectives, define a shared vision, and continuously elevate the member experience.

The name is intentional: The Cambridge Dictionary defines “summit” as the highest, most successful, or most important point in something—the place where clarity and direction align.

This level of clarity and cohesion is urgently needed. Private clubs may be relatively modest in revenue, but they are among the most complex businesses, especially when member-owners each bring their own perspective and priorities to the mix. Alignment across boards, committees, and management is mission-critical—and notoriously fragile. Volunteer leadership turnover and competing viewpoints often cause visions to drift, creating operational friction and strategic inconsistency.

The consequences are measurable. Nearly half of clubs have experienced negative real-dollar asset growth over the past two decades, while another quarter has grown, but not fast enough to fund required capital needs without debt or assessments. Meanwhile, every club wrestles with balancing dues levels against the cost of delivering an experience that satisfies a supermajority of members. And consistently, based on Club Benchmarking research, ten percent of members in every club remain deeply dissatisfied—and highly vocal—fueling misalignment and distracting from shared vision and long-term priorities.

Well-governed clubs counter this instability with disciplined processes grounded in accurate financial reporting and continuous feedback. Summit delivers those best practices at scale. It measures what truly drives financial performance, not legacy myths like food-and-beverage surplus/deficit, and provides the data foundation needed to stabilize direction, strengthen governance, and chart a shared path forward.

# The Summit Club Operating System

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## **DYNAMIC DASHBOARDS**

- Executive Overview
- Net Worth & Balance Sheet
- Finance
- Staffing & Compensation
- Membership
- Food & Beverage
- Golf
- Sports & Rec
- Governance
- Strategic Monthly Dashboards

## **FINANCE & OPERATIONS**

- Executive Dashboard
- F&B Report
- Labor Report
- Detailed Department Reports
- Trend Reports
- Financial Forecasting/Budgets

## **COMPENSATION & BENEFITS**

- Compensation Benchmarks for 150+ Positions
- All Salaried & Hourly Staff
- Health Insurance & Retirement Plan Benchmarks
- Report by Position or Department
- Advanced Workforce Analysis Reporting

## **BOARD PORTAL**

- Meeting Management
- Objectives & Performance
- Document Library
- Board Dashboard & Reports
- Committee Management Tools
- Secure Data Storage

## **VIEWPOINT SURVEYS**

### **MEMBERS**

- Cumulative Annual Member Survey
- Transactional Survey
- NPS Survey
- Snap Surveys

### **STAFF**

- Cumulative Annual Staff Survey
- Staff NPS
- Snap Survey
- Staff 360

### **BOARD & VOLUNTEER LEADERS**

- Board Self-Evaluation
- Beacon Governance Survey

## **FILTERING CAPABILITY**

- Club Type, Attributes & Location
- Club Size (Operating Revenue)
- Peer Cluster Filtering

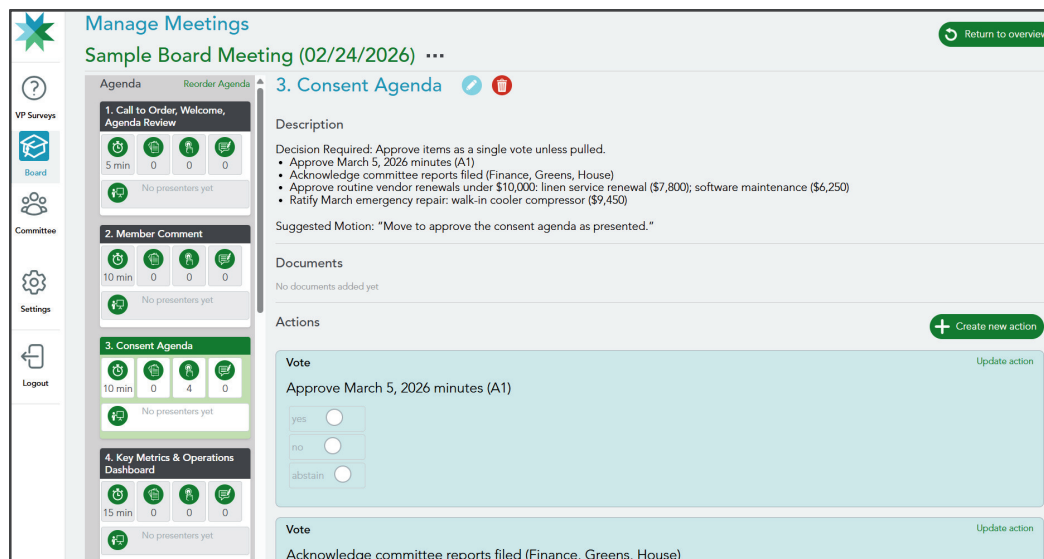
*\*Support for all VISTA subscriptions includes annual online analysis session, unlimited phone support, unlimited users, administrative access control and free data management services.*

# Board Portal - Features & Benefits

Empower your board, align committees, and manage club initiatives all from a single source of truth in the Board Portal. It's a robust suite of tools that ensure transparency, accountability, and value. The Club Benchmarking Board Portal serves as a secure central hub for club business planning, board, committee and department goals, special projects, performance reviews, meeting details, surveys and votes.

## MEETING MANAGEMENT

- Create meetings with agendas, documents, actions, and voting items quickly
- Manage and track all aspects of voting and poll any size group
- Export meeting-ready agendas with club branding, presenters, participants and documents
- Customizable meeting calendar
- Generate post-meeting minutes with one click including follow up for individual assignments



## OBJECTIVES & PERFORMANCE

- Organizes strategic, board and committee objectives
- Features include timelines, progress tracking with automatic roll-up to higher-level goals and overview of task assignments
- Monitor workload, progress, and accomplishments
- Balanced Scorecard performance tracking covers member satisfaction, staff development, financial performance and operational goals

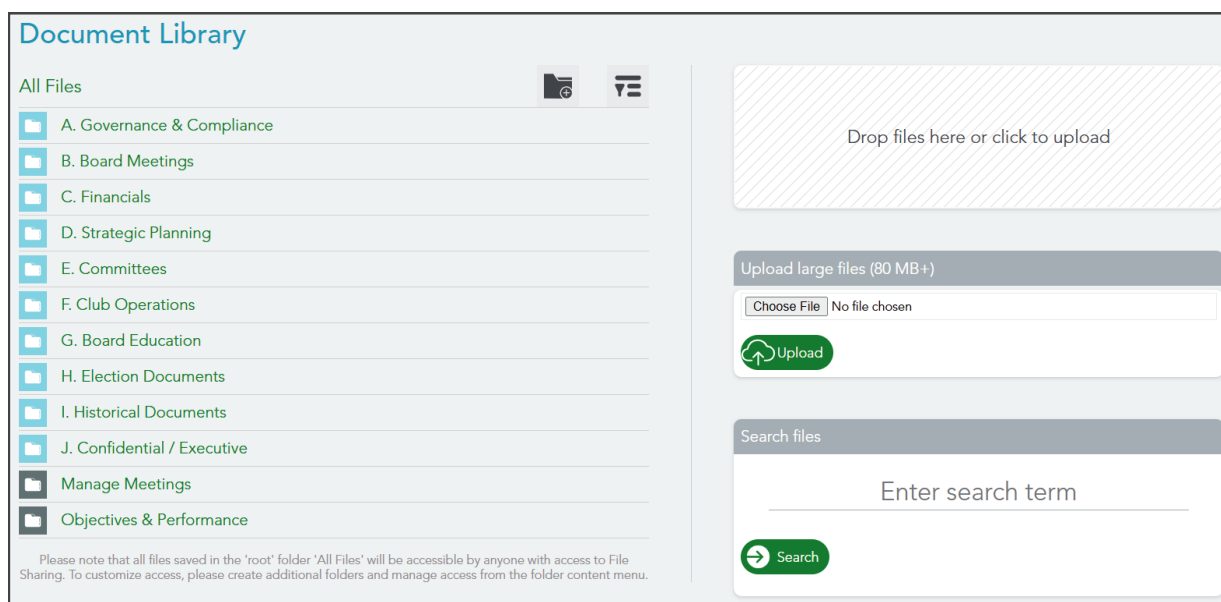


# Board Portal - Features & Benefits

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## DOCUMENT LIBRARY

- Drag-and-drop, secure, customizable file management system, houses board folders, bylaws, and other materials
- Powerful search engine locates files by title or content
- Robust administrative controls support flexible sharing permissions



## BOARD DASHBOARD & REPORTS

- Balanced Scorecards
- KPI templates are customizable and available for various roles
- Organizational KPIs integrate with databases for real-time benchmarking of critical metrics (e.g., Net Promoter Score)
- Dynamic survey reporting
  - Tailored survey reporting based on user

## COMMITTEE MANAGEMENT SECTION

- Committee-specific tools and resources
- Manage meetings and access calendars
- Document library access
- Objectives and performance section organizes committee objectives including timelines, progress tracking with automatic roll-up to higher-level goals and overview of task assignments

# Viewpoints - Features & Benefits

## MAKE STAKEHOLDER INSIGHTS YOUR STRATEGIC ADVANTAGE

Viewpoints is a next-generation survey intelligence solution, purpose-built to give club leaders fast, clear insight into the experiences and expectations of the people who matter most. By unifying three essential feedback streams — members, staff, and board — into one intuitive environment, Viewpoints delivers a holistic, connected view of your club’s performance and culture. With real-time dashboards, dynamic filters, integrated benchmarks, and secure sentiment analysis, Viewpoints translates raw feedback into strategic, immediately usable intelligence.

### Member Surveys: Understand Your Members







Viewpoints makes it simple to run ongoing, seasonal, or event-based surveys that capture point-in-time insights as members interact with your amenities, programs, and services. Leaders gain immediate visibility into what’s working, what’s changing, and where targeted improvements can drive satisfaction, loyalty, and long-term engagement. A secure, built-in sentiment analysis engine identifies recurring themes, measures tone, and connects open-ended comments to quantitative data—all without exposing sensitive information to public AI platforms.

### Staff Surveys: Measure Staff Engagement

Employees shape the member experience every day. Viewpoints tracks staff sentiment, strengths, and actionable opportunities, helping you retain top talent, reduce friction, and build a well-aligned service culture. Clear, practical data becomes a roadmap for operational improvements that benefit both staff and members.

### Board Surveys: Track Leadership Perception

Board-focused surveys illuminate leadership performance with clarity. Viewpoints benchmarks perception, alignment, and progress over time—strengthening governance, improving communication, and supporting more confident, informed strategic decision-making.

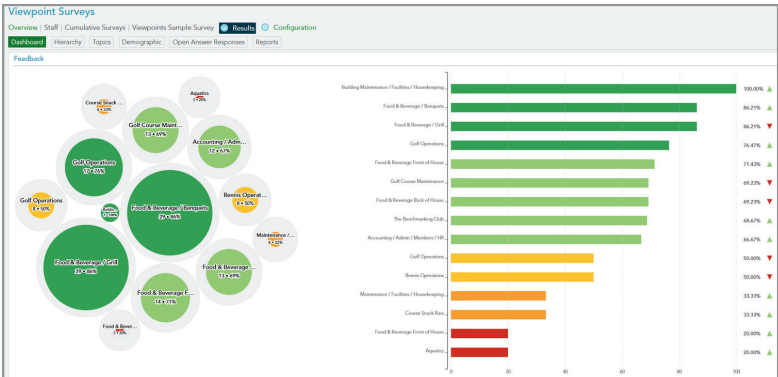
	<b>Viewpoint Surveys</b>
	<b>Member Surveys</b>
	Annual Cumulative Member Survey
	Transactional Survey
	Interval Survey
	NPS Survey
	Snapshot Survey
	
<b>Board</b>	
	<b>Staff Surveys</b>
<b>Committee</b>	Annual Cumulative Staff Survey
	Snapshot Survey
	NPS Survey
	360 Feedback Config
	
<b>BMS</b>	
	<b>Board / Volunteer Leadership</b>
<b>Settings</b>	Board Self Evaluation
	Beacon Governance Survey

# Viewpoints - Features & Benefits

Viewpoints delivers the insight club leaders need to elevate the member experience, strengthen organizational alignment, and make confident, data-driven decisions every day.

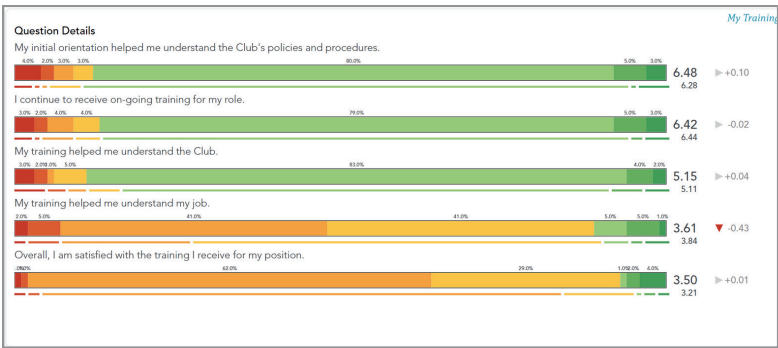
## MEMBER SURVEYS

- Cumulative Annual Member Survey
- Transactional Survey
- Member Net Promoter Score
- Snap Surveys



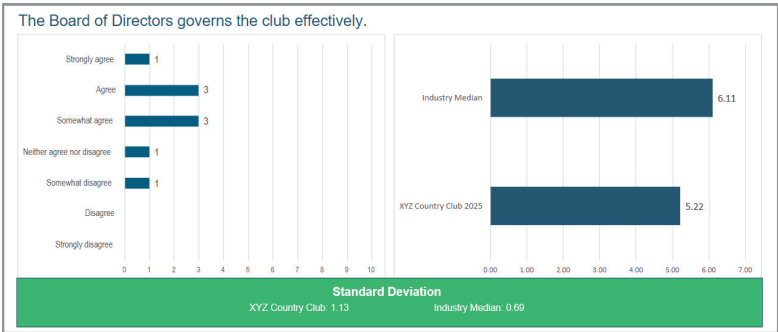
## STAFF SURVEYS

- Cumulative Annual Staff Survey
- Staff Net Promoter Score
- Snap Surveys
- Staff 360



## BOARD/VOLUNTEER LEADER SURVEYS

- Board Self-Evaluation
- Beacon Governance Survey







Learn more about the Summit club operating system

**[www.clubbenchmarking.com/summit](http://www.clubbenchmarking.com/summit)**