



Our goal is to have your data processed and review scheduled within 30 days of activation.

GETTING STARTED WITH VISTA

Timely data submission is the key to success. To ensure that you and your team get up and running quickly, our goal is to have your first round of data processed and a Benchmark Review session scheduled **within 30 days of activation**.

Data Submission:

Detailed instructions for your initial account population and for future annual updates is available at www.clubbenchmarking.com/onboard or visit the “Submit Data” section of our public website.

Additional Users:

Account administrators can register an unlimited number of users in the “Account Settings” section in the VISTA platform. Be sure to assign appropriate roles and permissions for each user. We recommend setting up two to three users to start – typically the GM and CFO/Controller plus the HR Director if you have one.

Training & Support:

Your subscription includes complimentary online training sessions for you and your team. Email kshea@clubbenchmarking.com with questions or training requests.

Annual Benchmark Review:

Once your initial data is loaded into the platform, we highly recommend scheduling a session with your CB Partner to review key benchmarks and discuss the findings. You will be sent a link to your partner’s schedule when your trial balance file has been processed.

ANNUAL ACCOUNT UPDATES

Your VISTA subscription includes data management services to simplify your annual updates. Instructions are at www.clubbenchmarking.com/onboard

Fiscal Year End

Financial and operational data should be updated at the end of your fiscal year.

Calendar Year End

Compensation and benefits data should be updated at the end of each calendar year.

Once a Year

Annual online benchmark review session with your regional CB Partner.

TIPS: SET YOUR CLUB UP FOR SUCCESS



Mark Your Calendar: Timely data submission is key. Include VISTA updates in your fiscal and calendar year end processes.



Get to Know Your CB Partner: We have a regional Executive Director assigned to every club we serve. Their role is to partner with you and provide insight and education for your leadership team. Talking to them about your goals and challenges will help them support you more effectively.



Build Your Team: Data-driven leadership is a team sport. Your subscription includes unlimited users so you can involve key members of your management team at no additional cost.



Engage and Learn: Take advantage of annual reviews and online training sessions to familiarize you and your team with the VISTA platform and its capabilities. Our data management team, analysts, CB Partners and support team are here to help. While self-paced learning is helpful, interactive sessions with our team can also help you utilize VISTA to its fullest potential.



Stay in Touch: Add the @clubbenchmarking.com email domain to your safe sender list to make sure you receive important notifications about account management, new reports, platform updates and webinar opportunities.



Leverage Free Resources: You'll find a curated collection of members-only resources in the "Club Resources" section of the platform including exclusive reports and board education materials.



Provide Feedback: We value your feedback. If something isn't working as expected or if you have suggestions for improvement, don't hesitate to let us know. (feedback@clubbenchmarking.com)