

## Private Country Club Admits GlobalSearch®

For The Patterson Club in Fairfield, Connecticut, the GlobalSearch Enterprise Content Management (ECM) Suite from Square 9 Softworks has proven itself to be a most desirable new member.

Nestled among gently rolling hills and green fields, The Patterson Club enjoys a sterling reputation and a distinguished history. Over time, however, the business of running this country club had grown more complex, and several problems were begging for an effective remedy, among them managing a steadily growing volume of employment documents and maintaining long-term membership records. The Patterson Club's senior management team chose GlobalSearch from among several prospective solutions, and has been delighted with its choice.

Founded in 1946, The Patterson Club is a private, family-oriented country club that provides its nearly 500 members with outstanding recreation and dining facilities, including a magnificent 18-hole golf course, 50-meter Olympic-size swimming pool, seven Har-Tru tennis courts for summer play and four paddle tennis courts for winter. Even in an affluent region widely known for its world-class golf courses, the Robert Trent Jones-designed course at The Patterson Club is a standout, regarded as one of the most challenging and finest conditioned golf courses in New England. "We believe it to be the premiere golf course in all of Fairfield County," said Dan Dombal, the country club's chief financial officer.

After more than 60 very successful years in operation, The Patterson Club was seeking an affordable, effective solution that would address the organization's evolving needs in three key areas:

- Managing employee documentation—including the records of many seasonal employees—from diversified departments around the country club's campus;
- Maintaining member records for memberships sometimes lasting up to 50 years or more; and
- Capturing expense data associated with a \$24 million clubhouse renovation project.

Pressing human resources challenges in particular had prompted The Patterson Club to consider a document management solution. Employing a permanent, year-round staff of 30, The Patterson Club's seasonal hiring requirements cause this

### Snapshot

**Industry:**

Leisure Services

**Departments Impacted:**

Human Resources, Accounts Payable, Records Management

**Featured Products:**

GlobalSearch

**Objectives:**

Manage employee, member and other critical records more efficiently

number to swell to between 100 and 125 employees, including golf and tennis pros, certified lifeguards and swimming instructors, grounds keepers and others. Quick and easy access to prior years' employment records for these individuals was a must.

Prior to adopting the GlobalSearch solution, The Patterson Club had been using a completely manual system to manage employee and member documentation. "With any manual system," Dombal said, "it's easy when you start the process, but as you add records and try to share the information with others, it can open up a hornets' nest in terms of the possibility of losing or misplacing files that are very difficult if not impossible to recreate." Contributing to the difficulty are state and federal laws requiring long-term retention of employment records, and the large number of hand-written documents. The Patterson Club evaluated several solutions, including those offered by its computer systems provider—a developer of software designed specifically for country clubs—and its copier vendor.

"While it appeared that the result of each solution would be similar," Dombal explained, "GlobalSearch was the simplest to implement and was extremely cost effective. Cost-wise, it beat every other solution—hands down—and GlobalSearch is remarkably easy to use, while understanding and operating the other solutions was far more complex. We were also quite pleased to find that GlobalSearch is supported very effectively by the Professional Services Team at Square 9 Softworks. We got answers fast, which was important to us."

With GlobalSearch, The Patterson Club retains no paper records when a new hire comes aboard. All relevant employment documents—from health exam reports and application forms to copies of personal identification items—are scanned directly into GlobalSearch. Once indexed into GlobalSearch, they can be retrieved easily by the department manager or general manager. “The real beauty of GlobalSearch,” Dombal said, “is that this information is accessible to our managers at any time, whether they’re in their office or at home or at another remote location.”

Records for The Patterson Club's existing members have been scanned into GlobalSearch, making a complete history of each member available to committee members and other authorized individuals. Invoices and critical records associated with the renovation project are being entered into GlobalSearch also. “All of this important data is now being backed up offsite through the Internet on a daily basis,” Dombal explained, “so there is literally no chance of it ever being lost.”

“In sum,” Dombal said, “GlobalSearch allows us to conduct business more easily, reliably and securely. Safeguarding our employee records helps us avoid the potential for an adverse judgment that could cost us perhaps tens of thousands of dollars. We have undertaken a multi-million-dollar renovation without having to hire an additional employee, which we had not thought possible. And GlobalSearch has dramatically reduced the amount of space needed for document storage in our new building.”

“We are considering other uses for GlobalSearch, as well,” Dombal added. “I would recommend the GlobalSearch Enterprise Content Management Suite without hesitation to organizations with challenges similar to those we had. It's such a perfect fit for a business operation like ours.”