



## **VISIONARY FINANCE - A 3-Part Webinar Series**

### **Session 1: *Building the Financial Foundation* [June 4th – 2 – 3pm]}**

The Session:

Financial credibility begins with the language you use and your understanding of it in the boardroom. Just as no one would claim credibility in a kitchen by saying they'll sauté onions and then drop them into boiling water, credibility in finance depends on a clear command of terminology and the ability to apply it correctly. When you're asked to review the income statement and balance sheet, what should you actually be looking for? In this session, participants will focus on interpreting income statement performance, with an introduction to the balance sheet, followed by a deeper dive in Session 2 with Eric Gregory of Club Benchmarking. Session 1 takeaways will center on the actions you can take to strengthen your financial credibility.

Speaker: Steve Badenoch, CFO Eugene Country Club

A career Chief Financial Officer and former General Manager known for exceptional financial leadership—building financial infrastructures where knowledge becomes power through application

Session 1 Agenda:

- Session introduction and objectives
- A practical look inside the boardroom
- Key financial terminology and why it matters
- Understanding the income statement and leadership's role in performance
- Translating insights into actionable impact for you and your organization

### **Session 2: *Financial Insights That Shape Strategy* [June 11th – 2 – 3pm]**

The Session:

This session opens the door to the boardroom for department leaders who rarely have visibility into the conversations between strategic consultants and board members; and how those discussions shape the organization's strategic direction and operational expectations. Led by Eric Gregory, the session brings clarity to the most important financial metrics, best practices, and processes that guide decision-making, helping translate high-level strategy into actionable insight. Participants will gain a clearer understanding of how effective governance is defined and how best-in-class organizations align leadership, finance, and operations to drive results.

Speaker: Eric Gregory, CCM Club Benchmarking Executive Director; West Coast

Eric is a recognized club industry expert on the subject of capital planning and capital strategies. His club career spans more than two decades including 10 years as GM/COO and an adjunct professorship teaching Advanced Club Management at Cal Poly - Pomona. As a regional CB Partner, he supports the entire range of Club Benchmarking Solutions for clubs in the Western US and Western Canada from his home base in Pasadena, CA.

Session 2 Agenda:

- Session introduction and objectives
- A practical look inside boardroom strategic planning
- Key Performance Indicators that belong to the Board of Directors

- Key Performance Indicators that belong to the Senior Management Team
- Translating strategic insights into strategic direction

**Session 3: *The Application of Knowledge* [June 18th – 2-3pm]**

The Session:

Session 3 brings together the key insights from the first two sessions, with a clear focus on application. It emphasizes the leader's responsibility to operate both tactically and strategically, regardless of competing demands on their time. While some roles naturally lean more toward strategy than others, all leadership positions require a strategic mindset. More importantly, the ability to apply it effectively within their specific area of responsibility. Participants will leave with the practical knowledge to translate what they've learned into consistent, meaningful action.

Speakers: Steve Badenoch, CFO Eugene Country Club and Scott Julien CCM, CCE; Beacon Executive Consultant Club Benchmarking

Session 3 Agenda:

- Session introduction and objectives
- The leader's role in both executive and operational strategy
- Accountability for driving and aligning strategic direction
- Leadership responsibility for the income statement and balance sheet
- Translating financial insights into actionable impact for you and your organization

CMAA Members who attend all 3 sessions can earn 3 Education Credits. Sessions must be attended with video on. Single Sessions attended will yield 1 Association Activity Credit/

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