

Looking for direction?



THE NAVIGATOR

Volume 7, Issue 7

www.apicsgulf.org

April 2008

April PDM



CUSTOMER RELATIONSHIP MANAGEMENT

Hello? Hello? Is There Anyone There?

PRESENTED BY DAN MARINO

ROSEDALE GOLF & COUNTRY CLUB IN BRADENTON
WEDNESDAY, APRIL 9 - 6:00 PM

Many companies who begin to embrace Customer Relationship Management often have no one single strategy. They are pushed into CRM by a compelling business problem or by a series of customer relationship issues. This presentation will look at how to assess your current organization's CRM readiness and outline the information required to affect the appropriate CRM change. This presentation will look at implementation strategies and a modular approach rather than a "big bang" approach.

Companies that succeed in the implementation of CRM and change the way their companies manage customer relationships have not only invested in software, but they have embraced a strategy that re-engineered the company through-out the entire quote to cash value chain.

This upbeat and interactive talk will give insight and ideas on this subject, it will provide the attendees with practical solutions that they can bring back to their own companies and begin to use the next day.

CPIM designees will earn 1 point towards certification maintenance.

Registration begins at 5:30pm at the Rosedale Golf & Country Club in Bradenton. Directions to Rosedale Golf & Country Club can be found on Page 8 (last page) of this newsletter.

Reservations must be made by Monday, April 7 before 12 noon. Cost is \$25/Members, \$30/Non-members, \$10/Students. Make your reservation at reservations@apicsgulf.org or call Kevin Hauge, CPIM, at (727) 776-3950. Cancellations must be received by 12 noon on Tuesday, April 8th. Please note that no shows will be billed. Please note Rosedale's dress code is "No jeans or men's shirts without collars, please."

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About the Presenter: DANIEL A. MARINO is a Senior Partner of Marino Associates, LLC a manufacturing consulting firm specializing in ERP/MRP II, Lean/ Operations with Gerber Technology, Inc., Tolland, Connecticut, Director of Manufacturing and Materials, for a high tech CAD manufacturer, Vice President of Manufacturing for a large capital machine manufacturer, as well as Manufacturing Engineering Manager, and MRP II Project Manager for a large capital equipment manufacturer.

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THE NAVIGATOR is published monthly by the Florida Gulf Coast Chapter of APICS -- The Association for Operations Management. THE NAVIGATOR is sent each month to members of the APICS Florida Gulf Coast Chapter. Annual subscription is included in the APICS membership dues.

All material submitted for the March issue of THE NAVIGATOR is due by Friday, April 25th. Please address all correspondence to:

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Officer's Corner

Wende Huehn-Brown, Ph.D, CPIM
VP Education

Today's competitive marketplace requires people to continuously upgrade their skills and knowledge in order to better prepare and act on challenges and opportunities within it. But your ability to learn is more demand driven than you may think. The thing is, we learn in response to a need. If we cannot see the need for what is being taught (or what others feel we should learn), we ignore it, reject it, or fail to assimilate it in any meaningful way.

The knowledge and skills that may be deemed optional in today's workforce will be required in tomorrow's workplace, especially in our growing global competitive environment. Today's operating environment is far more complex than just 10 years ago and this requires greater skills to understand these more advanced systems. Some organizations don't seem to recognize that their strategic intent is not captured solely by their own business model, but it is by their supply chain model and this requires greater customer focus and supplier relationship management. This changing environment is basically why APICS has created the Certified Supply Chain Professional (CSCP) program.

Recognize that this competitive environment has accelerated the demand for change, but we have this inherent learning process that requires us to understand this need more behind this demand. If people do not recognize this need, they won't learn anything new, which is the vital link to seeing and sustaining improvement opportunities. This is not only a challenge individually, but also organizationally. Organizational learning is defined as an experienced-based process through which knowledge about action-outcome relationships develops. It is encoded in routines, embedded in organizational memory, and changes collective thinking and behavior. Now the quality of this organizational learning will primarily depend on:

- Organizational Culture - transparency, integrity, issue orientation, inquiry, and accountability
- Psychological Facets – safety, reluctance to take risk, organizational commitment
- Policies - procedures, budgets, decision rules, models
- Context - error criticality and consequences, environmental uncertainty, task structure, rewards, leadership commitment

These factors will either facilitate or inhibit learning and are prevalently used in a variety of applications. Understand that individual learning produces individual insights and changes in habits, skills, and actions. While organizational learning produces changes in norms, doctrines, standard operating

Continued Page 4

Your Chapter Proudly Presents A Michael Ford Seminar On May 14, 2008

Sales & Operations Planning: Developing a Process that Works!

This workshop will present a comprehensive overview of sales and operations planning (S&OP), from fundamentals to advanced concepts. It is appropriate for those seeking to establish an S&OP as well as those who wish to improve their current process. The presenter will begin by identifying S&OP as a medium term plan supporting the longer-term corporate strategy. The higher level plans, combined with demand and capacity management and management directives, will serve as the inputs to the process.

Interactive team exercises will highlight the need for participation in the S&OP activity as well as emphasizing the "numbers-driven" process. The presenter will discuss a variety of outputs from the S&OP: production plan, purchasing plan, staffing requirements, cash flow, plant capacity, distribution, service requirements, etc. Discussion will include core performance measurements and appropriate corrective actions when the reported actual deviates from the intended plan. The presentation will also illustrate how S&OP leads into the master scheduling activity. Finally, the presenter will address common pitfalls to avoid, as well as suggestions for accomplishing success.

Attendees will learn:

- **What** is S&OP?
- **Why** is S&OP vital to organizational success?
- **Where** does S&OP fit into the planning hierarchy?
- **Which** environments does S&OP apply to?
- **Who** is responsible for participating in the S&OP process?
- **How** can S&OP be effectively implemented?

After the event attendees will receive a solutions tutorial in MS Excel that presents practical examples of the following exercises:

- Forecasting techniques
- Optimization of the S&OP
- Bill of Resources to manage capacity
- Disaggregating the S&OP into master scheduling

Three or more participants from the same company can save \$20.00 each.

Registration from 8:00 am to 8:30 am

Seminar held from 8:30 am to 5 pm includes continental breakfast and lunch

Calendar of Events

April PDM

Date Wednesday, April 9, 2008
Topic Customer Relationship Management
Speaker Dan Marino
Place Rosedale Golf & Country Club
Time 5:30 pm Registration
Cost \$25 members/\$30 non-members
Contact Kevin Hauge (727) 776-3950 OR
RESERVATIONS@APICSGULF.ORG

May Seminar

Date Wednesday, May 14, 2008
Topic Sales & Operations Planning
Speaker Michael Ford, CFPIM, CSCP, CQA, CRE, EI, QI
Place Rosedale Golf & Country Club
Time 8:00 am Registration
Cost \$199 members/\$249 non-members
\$20 discount each for 3 or more
Contact Kevin Hauge (727) 776-3950 OR
RESERVATIONS@APICSGULF.ORG

May PDM

Date Wednesday, May 14, 2008
Topic Back to Basics: A Review of the Top-down Hierarchy
Speaker Michael Ford, CFPIM, CSCP, CQA, CRE, EI, QI
Place Rosedale Golf & Country Club
Time 5:30 pm Registration
Cost \$25 members/\$30 non-members
Contact Kevin Hauge (727) 776-3950 OR
RESERVATIONS@APICSGULF.ORG

June PDM

Date Wednesday, June 11, 2008
Topic Plant Tour
Host PGT Industries
Place PGT Industries, Nokomis, FL
Time TBD
Cost TBD
Contact Kevin Hauge (727) 776-3950 OR
RESERVATIONS@APICSGULF.ORG

Officer's Corner continued...

procedures, structures, and cultures. Both these types of learning have the key objective of learning and acting in advance of events or needs. Too often, managers are given a false sense of security that they are right on top of things due to all their hard work and efforts. But in today's world, many believe this to be a sign that the manager or organization has lost control. Achieving the highest levels in performance requires an ongoing journey of continuous improvement and this is linked closely to a well-executed approach for organizational and personal learning. Organizational learning includes both continuous improvement of existing approaches and adaptation to change, which leads to new goals and/or approaches (MBNQA).

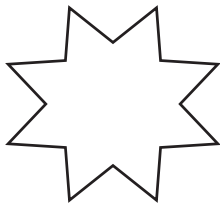
Dan Marino continued ...

A proven world class manufacturing executive, Mr. Marino has been fortunate to enjoy a track record of successfully directing the manufacturing activities of world leading companies. He is listed in "Who's Who in American Manufacturing".

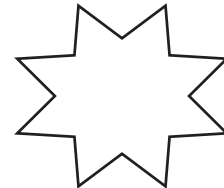
Mr. Marino has more than thirty years in materials and manufacturing with experience in ERP, Lean/Agile Manufacturing process, JIT, MRP II, Capacity Planning, Lean Agile Manufacturing, JIT, TQM, and related consulting and education. Prior to establishing his own firm Mr. Marino was a Senior Consultant with Robert Abair Associates.

As a popular public speaker, Mr. Marino has enjoyed delivering numerous presentations over the years to a variety of professionals and organizations. He is a frequent speaker and educator on the local, national and international level. He is a past member of the Board of Directors for the Manufacturing Association of Connecticut and a member and former VP of Education and Research of the American Production and Inventory Control Society.

Mr. Marino is considered a motivator and is recognized as leader in his field working with companies such as AT&T, Kodak, GE, Crane & CO, York Air Conditioning, Keeler Brass, Reed & Barton, Hussey Seating, C-COR, Hasbro, Hadco, Lego and Natick Labs..



***BASICS OF SUPPLY
CHAIN MANAGEMENT***



A special Thank You to Jerry Kilty, CFPIM, CIRM, CSCP, our education instructor, for his commitment to the members of our chapter. Please join Jerry for instruction in the Basics of Supply Chain Management, the first step toward becoming CPIM. The classes will be held for seven consecutive Mondays commencing on May 19 with the exception of May 26 (Memorial Day). That week's class will be held on May 29. The final class will be held on June 30.

The course price is \$525 per student , which includes the workbook.

Please register directly with Jerry Kilty, CFPIM, CIRM, CSCP at 727 725-7674 or qmsjerry@ij.net before April 21, 2008.

Individual Membership Application

Priority Code: 00APP

3 WAYS TO APPLY FOR MEMBERSHIP

FAX: Send this form (front & back) to (703) 354-8556 with your credit card number.

PHONE: Call APICS Customer Service at (800) 444-APICS (2742) or (703) 354-8851, 8:30 a.m.—6:30 p.m., EST, Monday through Friday. Have your credit card ready.

MAIL: Return a completed application form by mail to:

APICS, Membership Dues
P.O. Box 75381
Baltimore, MD 21275

APICS USE ONLY (DO NOT WRITE IN THIS SPACE)

BATCH #

CHECK AMOUNT \$

CHECK #

DUES AMOUNT \$

Please complete all sections. Please print or type.

Today's date: ____/____/____

Questions? Call APICS Customer Service at (800) 44-APICS (2742) or (703) 354-8851.

1. Member Information

APICS member or customer ID number? _____ CIRM CPIM CFPIM
Please print your legal name and address as they should appear on mail. Mr. Mrs. Ms. Miss

LAST NAME FIRST NAME MIDDLE INITIAL

Please check your preferred mailing address. Work Home

JOB TITLE COMPANY NAME

BUSINESS ADDRESS

CITY STATE/PROVINCE ZIP/POSTAL CODE COUNTRY

_() BUSINESS PHONE () BUSINESS FAX

HOME ADDRESS

CITY STATE/PROVINCE ZIP/POSTAL CODE COUNTRY

_() HOME PHONE

Check here to exclude your name from rented or traded mailing lists. Telemarketing use of APICS mail lists by sources other than APICS is strictly prohibited.

The following information is requested for identification purposes only. This information is optional and will not be provided to any outside sources.

Female Male Date of Birth _____ Social Security Number _____

Please complete the demographics page (other side) and submit it with this application.

2. Society Dues (\$150.00 Plus Chapter Dues) As of April 1, 2008

Society Dues* \$150.00

Place me in the Florida Gulf Coast chapter.

Chapter Dues \$ 50.00

Annual dues must include both Society and chapter dues.

(a) Total Membership Dues \$200.00

* A portion of your dues, a \$24 nondeductible value, supports your subscription to APICS – The Performance Advantage, and cannot be deducted from your dues amount.

SIG Membership

Check all SIGs you wish to join (SIG names and dues are subject to change).

Complex Industries (CI) Process Industries (PI) Small Manufacturing (SM) Constraints Management (CM)
 Remanufacturing (REMAN) Repetitive Manufacturing (RMG) Textile and Apparel (TA) Service (SVC)

(b) \$15 x _____ (no. of SIGs) = \$ _____

(c) I wish to join APICS for 1 year 2 years 3 years 4 years 5 years.

Total Dues (a + b) = \$ _____ x No. Years (c) = _____ = Total Amount \$ _____

3. Payment

Please submit payment in U.S. dollars only. Purchase orders are not accepted. APICS dues are not deductible as a charitable contribution for federal tax purposes, but may be deductible as a business expense. Please include member name and company name on check.

Check no. _____ is enclosed for \$ _____ (Checks must be made payable to APICS and drawn on a U.S. bank.)

Charge to: MasterCard VISA American Express Discover

APICS. Making Business Run Better

Please provide the following demographic information by checking all of the square(s) applicable for each

APICS - The Educational Society for Resource Management is a not-for-profit international educational organization respected throughout the world for its education and professional certification programs. With nearly 70,000 individual and corporate members in 20,000 companies worldwide, APICS is dedicated to using education to improve the business bottom line.

APICS is recognized globally as

- the source of knowledge and expertise for manufacturing and service industries across the entire supply chain - in such areas as materials management, information services, purchasing and quality.
- the leading provider of high-quality, cutting-edge educational programs that advance organizational success in a changing, competitive marketplace.
- a successful developer of two internationally recognized certification programs, Certified in Production and Inventory Management (CPIM) and Certified in Integrated Resource management (CIRM)
- a distribution center for hundreds of business management publications and educational materials.
- a source of solutions, support, and networking through local chapters, workshops, symposia, and the annual APICS International Conference and Exposition

4. Member Profile

a. Business Environment (Check one.)

- a. Manufacturing d. Academic
b. Service e. Government
c. Consulting

b. Industry Type of Your Division (Check all that apply.)

- | | |
|--|---|
| <input type="checkbox"/> a. Automotive | <input type="checkbox"/> n. Mining |
| <input type="checkbox"/> b. Aviation/Aerospace | <input type="checkbox"/> o. Transportation |
| <input type="checkbox"/> c. Communications | <input type="checkbox"/> p. Retail |
| <input type="checkbox"/> d. Defense | <input type="checkbox"/> q. Maintenance/Repair/Operations |
| <input type="checkbox"/> e. Distribution | <input type="checkbox"/> r. Metal Fabrication |
| <input type="checkbox"/> f. Education | <input type="checkbox"/> s. Pharm/Chemicals |
| <input type="checkbox"/> g. Electrical | <input type="checkbox"/> t. Plastics/Rubber |
| <input type="checkbox"/> h. Electronics | <input type="checkbox"/> u. Textile/Apparel |
| <input type="checkbox"/> i. Health Care/Med. Devices | <input type="checkbox"/> v. Lumber/Paper |
| <input type="checkbox"/> j. Food/Beverages | <input type="checkbox"/> x. Software/Hardware |
| <input type="checkbox"/> k. Furniture | <input type="checkbox"/> y. Utilities |
| <input type="checkbox"/> l. Glass | <input type="checkbox"/> 1. Biotechnology |
| <input type="checkbox"/> m. Graphic Arts | <input type="checkbox"/> 2. Machinery |
| | <input type="checkbox"/> z. Other _____ |

c. Industry Classification of Your Division (Check all that apply.)

- | | |
|---|--|
| <input type="checkbox"/> a. Job Shop | <input type="checkbox"/> e. Repetitive |
| <input type="checkbox"/> b. Process | <input type="checkbox"/> f. Discrete |
| <input type="checkbox"/> c. Remanufacturing | <input type="checkbox"/> g. Nonmanufacturing |
| <input type="checkbox"/> d. Assembly | |

d. Key Area of Responsibility (Check all that apply.)

- | | |
|---|--|
| <input type="checkbox"/> a. Distribution | <input type="checkbox"/> l. Quality/Service |
| <input type="checkbox"/> b. Inventory Control | <input type="checkbox"/> m. Human Resources |
| <input type="checkbox"/> c. Operations | <input type="checkbox"/> n. Mgmt. Info. Systems |
| <input type="checkbox"/> d. Materials Mgmt. | <input type="checkbox"/> o. Research & Development |
| <input type="checkbox"/> e. Engineering | <input type="checkbox"/> p. Training/Education |
| <input type="checkbox"/> f. Sales/Marketing | <input type="checkbox"/> q. Supply Chain |
| <input type="checkbox"/> g. Finance/Accounting | <input type="checkbox"/> r. Self-Employed |
| <input type="checkbox"/> h. Professional Services | <input type="checkbox"/> s. Planning/Scheduling |
| <input type="checkbox"/> i. Shipping/Receiving | <input type="checkbox"/> t. Forecasting |
| <input type="checkbox"/> j. Production Control | <input type="checkbox"/> u. Logistics |
| <input type="checkbox"/> k. Purchasing | |
| <input type="checkbox"/> z. Other _____ | |

e. Your role in Product Acquisition (Check all that apply.)

- | | |
|---------------------------------------|----------------------------------|
| <input type="checkbox"/> a. Recommend | <input type="checkbox"/> d. Buy |
| <input type="checkbox"/> b. Specify | <input type="checkbox"/> e. None |
| <input type="checkbox"/> c. Authorize | |

f. Your Job Title/Function (Check one.)

- | |
|--|
| <input type="checkbox"/> a. Senior Management (CEO/VP/General Mgr./Plant Mgr.) |
| <input type="checkbox"/> b. Department/Divisional Management (Materials Mgr./Operations Mgr./Director) |
| <input type="checkbox"/> c. Functional Management (Systems Analyst/Scheduler/Planner) |
| <input type="checkbox"/> d. Other Resource Management Professional |

g. Number of Employees at Location (Check one.)

- | | |
|---------------------------------------|-------------------------------------|
| <input type="checkbox"/> a. Under 100 | <input type="checkbox"/> d. 500-999 |
| <input type="checkbox"/> b. 100-249 | <input type="checkbox"/> e. 1,000+ |
| <input type="checkbox"/> c. 250-499 | |

h. Why Are You Joining APICS? (Check all that apply.)

- | | |
|--|---|
| <input type="checkbox"/> a. Networking | <input type="checkbox"/> b. Career enhancement/professional development |
| <input type="checkbox"/> c. Certification | <input type="checkbox"/> d. Recommended by _____ |
| <input type="checkbox"/> e. Discounts on educational offerings | <input type="checkbox"/> f. Keeping up with industry developments |
| <input type="checkbox"/> g. APICS publications/magazines | <input type="checkbox"/> h. Chapter activities |
| <input type="checkbox"/> i. Recommended by employer | <input type="checkbox"/> j. All of the above. |
| <input type="checkbox"/> z. Other _____ | |

i. Membership Involvement (Check all that apply.)

Please indicate the chapter activity in which you would like to participate.

- | | |
|--|--|
| <input type="checkbox"/> a. Education | <input type="checkbox"/> f. Seminars |
| <input type="checkbox"/> b. Publicity | <input type="checkbox"/> g. Treasurer |
| <input type="checkbox"/> c. Programs | <input type="checkbox"/> h. Secretary |
| <input type="checkbox"/> d. Membership | <input type="checkbox"/> i. Newsletter |
| <input type="checkbox"/> e. Employment | |

j. How many years have you been in the resource management field?

- | | | | |
|---|----------------------------------|------------------------------------|-----------------------------------|
| <input type="checkbox"/> 4 yrs. or less | <input type="checkbox"/> 5-8 yrs | <input type="checkbox"/> 9-14 yrs. | <input type="checkbox"/> 15+ yrs. |
|---|----------------------------------|------------------------------------|-----------------------------------|

APICS does not currently participate in or contribute to any lobbying efforts.

Questions? Call APICS Customer Service at (800) 444-APICS (2742) or (703) 354-8851, 8:30am - 6:30pm EST Monday through Friday.

Chapter Elections

It's that time of year again when our chapter develops its slate of officers for the upcoming 2008-2009 Board of Directors.

Participating on the BOD expands your networking possibilities and helps to enhance your leadership and facilitation skills by participating in the development of programs and educational offerings for our members, and interacting with APICS District representatives and other chapter volunteers throughout our District. It also provides points towards your CPIM certification maintenance requirements.

BOD position descriptions for all of our VP positions are available upon request. If you are interested in any of the positions, or know a current member of our chapter who might be interested, please submit the name(s) by Friday, April 4th to Katrien Dolk-Etz, CPIM at elections@apicsgulf.org.

Please consider enhancing your membership by becoming an active BOD member in 2008-2009. If you prefer not to be an elected officer and would like to be active at the leadership level please consider a position as a Director. If you have just a little time to offer, or more, we can match you with the right responsibilities!



NEW APICS MEMBER BENEFITS FOR 2008

APICS is pleased to announce new member benefits for 2008, including:

- Full access to the Aberdeen Research Archive of more than 5,000 documents focused on the global value chain (a \$995 value)
- Member pricing on American Management Association business and management training
- Member savings on registration to the APICS and IBF Sales and Operations Planning Conference.

Company Coordinators

ASO CORPORATION

LEE STEPHENS (941) 379-0300

BOAR'S HEAD

VIVIAN SMITH (941) 955-0994

EATON CORPORATION

INA WALDRON (941) 751-7118

HI STAT MANUFACTURING

JOHN ELLIOT (941) 355-9761

HONEYWELL

IRENE CAREY (941) 360-6141

PGT INDUSTRIES

FRANK CREHORE, CPIM (941) 486-0100

SUN HYDRAULICS

LYN HAYCOCK (941) 362-1345

TROPICANA

SCOTT CHANCE, CPIM (941) 749-3925

Interested in learning more about APICS and what's happening in your local chapter? Contact your Company Coordinator! If your company isn't listed contact Cinda Whaley, VP Membership, to find out how you can help.

A Company Coordinator promotes APICS within their own company by:

- Defining the benefits of membership.
- Explaining the certification programs.
- Circulating the monthly meeting announcement and offering to make the necessary reservations.
- Posting schedules of seminars, certification review courses and fundamentals classes.
- Leading by example and attending as many Professional Development meetings as possible.

Benefits of being a Company Coordinator:

- Earn 2 points/year towards CPIM maintenance.
- Professional growth by learning about all the programs that APICS Florida Gulf Coast has to offer and participating in those programs.
- Personal growth in helping your colleagues develop their professional skills.
- Recognition by your superiors as being a team player who wants to help the company grow and doesn't just show up at the job.
- Recognition at the chapter's annual top management night.



Florida Gulf Coast Chapter

c/o Irene Carey
Honeywell International
8323 Lindbergh Court
Sarasota, FL 34243

Looking for direction?

THE NAVIGATOR

APICS
Florida Gulf Coast

Volume 7, Issue 7 **www.apicsgulf.org** **April 2008**

April PDM

CUSTOMER RELATIONSHIP MANAGEMENT

LOCATION:	Rosedale Golf & Country Club Bradenton, FL	DATE:	April 9, 2008
SPEAKER:	Dan Marino	TIME:	5:30pm Registration 6:00pm Dinner
COST:	\$25 members / \$30 non-members / \$10 students		7:00pm Presentation

Directions to the PDM:

From Bradenton:

Take 301 South. Turn left onto SR-70. Continue on SR-70 past I-75. Turn left onto 87th Street East (Rosedale development's entrance-Note traffic light at the entrance to Rosedale) Follow the signs to the CC clubhouse.

From Naples:

Take I-75 North to Exit 217A (SR-70). Turn right onto SR-70.
Turn left onto 87th Street East (Rosedale development's entrance-note traffic light at the entrance to Rosedale)
Follow the signs to the CC clubhouse.