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Overview

As the need to gain and retain customers with as little as much spend as possible becomes even more important, we must look to ensure that our processes allow us to actively follow a customer's progression with our business and not let them get lost in the 'system'.

Retention is a unique module of Links Modular Solutions that allows users to setup step by step programs that are applied to a customer either at time of enquiry, or time of sale. That sale may be the purchase of a memberships, visit pass or even a booking into a class i.e. swim lesson.

The unique setup will alleviate the need for external programs outside links to track and manage enquiries. It also ensures that regular contact can be maintained with customers and their contact tracked and managed throughout their time as a customer with the business.

Prospect Programs

Retention allows you to setup types of programs that will be applied to prospects as they are entered into the database. Mandatory fields can be set for collection so that no prospect can be saved without the application of information such as Source of Enquiry and Type of Enquiry.

Depending on the prospect program you design, the system could prompt users to follow up enquiries with a phone call, two days after their centre tour, or to send a letter if they still haven't joined after three weeks for example.

The automatic application of a prospect to the program you design will ensure that provided a prospect is entered into the database with at least their first name and surname, there is no way they can fall through the cracks.

Retention Programs

It is no secret that it is much cheaper to retain an existing customer than to gain a new one. However due to the manual work involved up until now, our retention strategies have often been limited by what we can offer based on our balance or staffing costs to retention financial gains. The retention programs within the retention module allow users to setup a specific order of steps that are followed by the customer throughout their time with your business. Whether follow up reminders are set for Fitness Consultations or Programs Shows, or it is simply a phone call to see how they are enjoying their time with you, the retention program allows you to have automatic control and not be reliant upon manual systems.

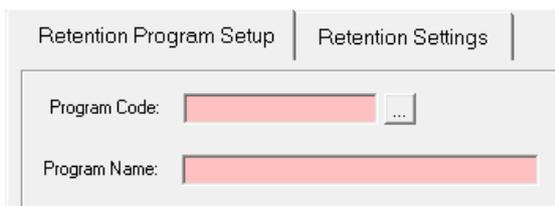
Setting up your Prospect Programs

Prospect programs are designed to allow users to automatically set follow up reminders for prospective customers. It will also allow management to report on at what stage prospects are being converted to customers, and therefore to track which processes are effective.

Program Settings

Admin > Retention > Retention Program Setup

1. The screen will open with the Program Code & Name fields available



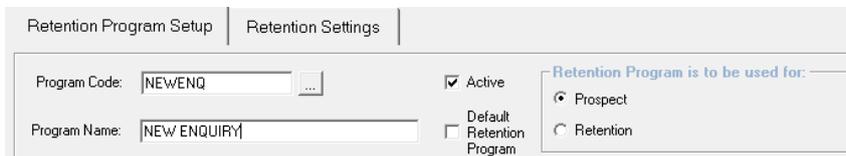
The screenshot shows the 'Retention Program Setup' tab selected. There are two input fields: 'Program Code' and 'Program Name', both of which are currently empty.

2. Enter a code and description to activate the remainder of the screen

For example

- CODE = NEWENQ
- DESCRIPTION = NEW ENQUIRY

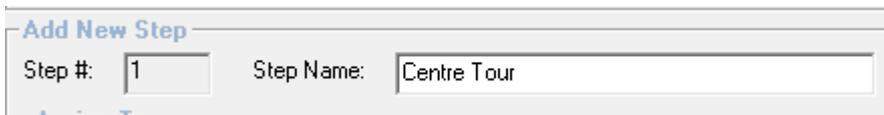
3. Select that the program is a PROSPECT PROGRAM



The screenshot shows the 'Retention Program Setup' tab with the following details: 'Program Code' is 'NEWENQ', 'Program Name' is 'NEW ENQUIRY', the 'Active' checkbox is checked, and 'Retention Program is to be used for' is set to 'Prospect'.

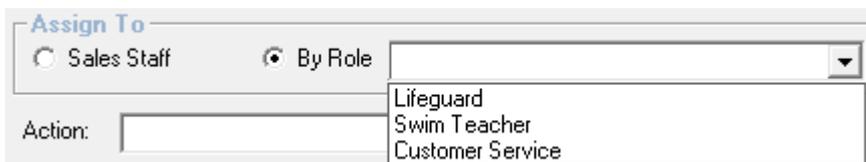
4. You can now begin to enter the steps that relate to the program

5. Enter a step description



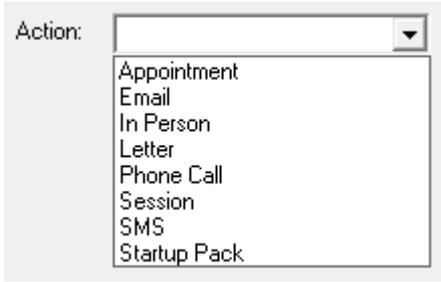
The screenshot shows the 'Add New Step' form. The 'Step #' field contains '1' and the 'Step Name' field contains 'Centre Tour'.

6. Enter the staff member or team that will complete the task. If sales staff is selected then when a customer is assigned to a program, it will ask the user which staff member the steps should be assigned to.



The screenshot shows the 'Assign To' form. The 'Sales Staff' radio button is unselected, and the 'By Role' radio button is selected. A dropdown menu is open, showing the following roles: Lifeguard, Swim Teacher, and Customer Service.

7. Enter the action type for the step

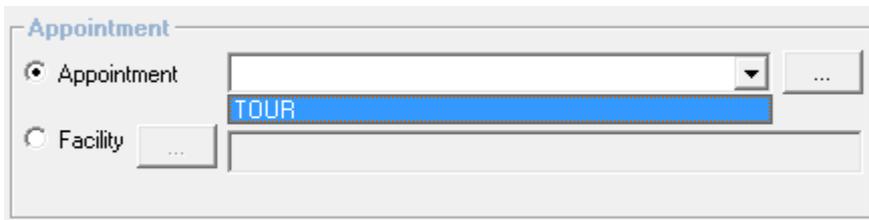


The options available for each action will vary depending on the action type selected.

Appointment

Either the appointments scheduler in the POS module or facility can be used for retention step appointments. The benefits vary depending on the outcome required. The appointments scheduler is simple and basic to use, but has no billing options. The facility bookings module requires more setup but can have multiple facilities (or trainers) viewed at any one time and charges can be applied if required.

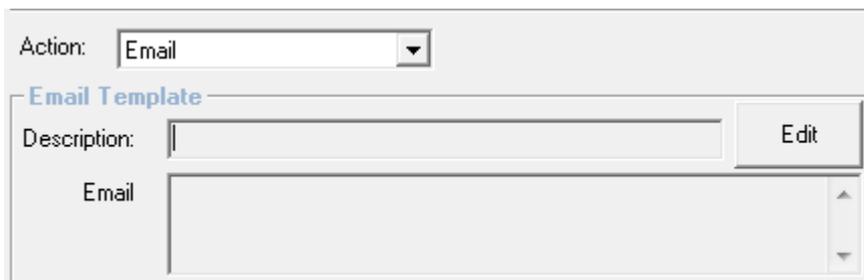
At each step level, you can choose which 'appointment' is selected. This will enable the users when actioning a customer's step access the correct appointment/facility type automatically.



Note - For the appointment type to show up in the drop menu you must have selected Sales Reporting in the appointment type setup.

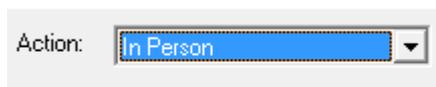
Email

An email template can be applied to the step, by the same manner that it is applied to a non attendance reminder. See the system settings section of this user guide for further information.



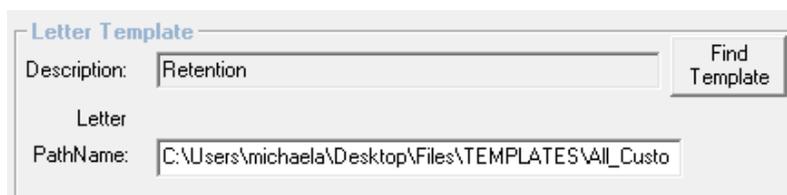
In Person

An action type of In Person is available; however it is assumed that this action type will be used when manual follow up is required.



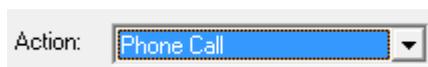
Letter

A letter template can be applied to the step provided it has been setup in the Letter Templates screen. See the system settings section of this user guide for further information.



Phone Call

If the action type is phone call, then there are no templates or automation required.

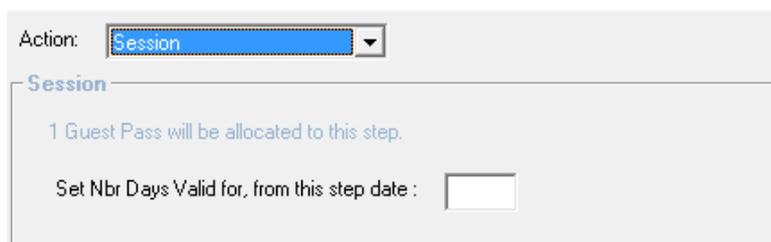


Session

You may wish to have a step that is a session for example;

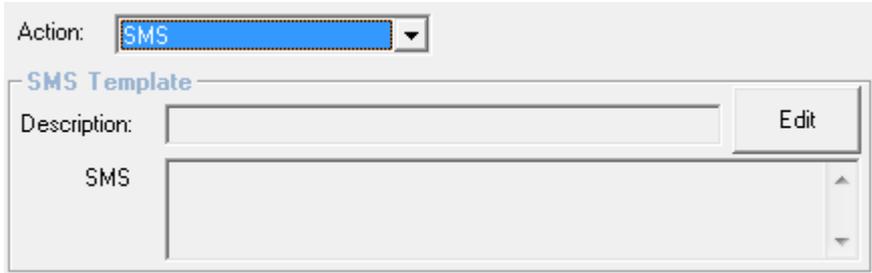
- Trial a group exercise class
- Trial the Living Longer Living Stronger program

As the user is not yet a member, then a guest pass is allocated to the prospect so that they can access the session. You can choose a number of days that this guest pass stays valid for from the step date. For example the step is 7 days in the prospects program, and you want the pass to be valid for a further 7 days, in case it takes them another week to attend a session.



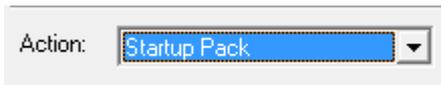
SMS

You can assign an SMS template to the step. See the system settings section of this user guide for further information.



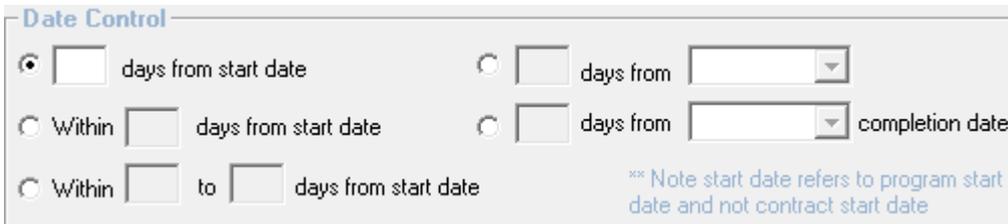
Start Up Pack

This action type may not be so relevant to prospects however it can be used if required. The startup pack step will notify the user at Point of Sale when an attendance is recorded for the prospect/customer. Further information is discussed in the retention program setup section of this document.



8. Enter the date control for this step

There are 5 date options available



- # days from start date

This will make the step due at a number of days for example

- Program is started on July 1st
- Date control for step is 7 days from start date
- The step becomes due on July 8th

- # days from a Step

This will make the step due the set number of days after the selected step.

- Within # days from start date

If this option is selected the step will show as due for all the days between the start of the program and the final day it is due. For example;

- Program starts on July 1st
- Date control for step is within 7 days from start date

- The step shows as due on;
 - July 1st, 2nd, 3rd, 4th, 6th, 7th & 8th
- # days from a Step Completion Date

This will make the step due the set number of days after the selected step is completed.

- Within # to # days from start date

This will allow the step to display similar to within # days from start however the first date is not from the start of the program. For example within 7 to 14 days of the program start date.

9. Enter a description for the step if required. You may to for example enter what should be said in a phone call for this step. The description will show in the customers tracking screen so that staff can see what is required from the step.

Description:

10. Once all of the details of the step have been entered, click on the

Add Step

11. You are now ready to add the next step of your program

12. Continue until all steps are completed and the click on the

Save Program

button

Setting up your Retention Programs

Retention programs may vary depending on the customer groups that you have attend your facility. For example you may have 8 different retention programs;

- New Full Access Members
- Existing Full Access Members
- New PT Members
- Existing PT Members
- New Swim School Students
- Existing Swim School Students
- New Aquatic Members
- Existing Aquatic Members

Retention programs can be restricted by customer groups

- Members
- Visit Pass Holders
- Students

Within those groups membership/visit pass types and also class types can be limited.

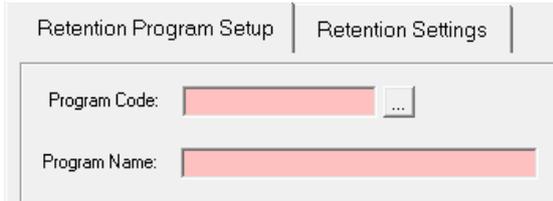
For example, the New Full Access Members retention program only applies to Full Access Membership Types and not Aquatic Only Membership types.

Adding a Retention Program

Program Settings

Admin > Retention > Retention Program Setup

1. The screen will open with only the Program Code and Name fields available



The screenshot shows a tabbed interface with 'Retention Program Setup' selected. Below the tabs are two input fields: 'Program Code:' with a red text box and a small '...' button to its right, and 'Program Name:' with a red text box.

2. Enter a code and description to activate the remainder of the screen

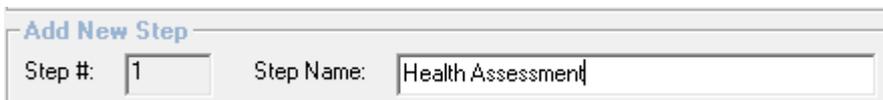
For example

- CODE = NEWFAMEM
 - DESCRIPTION = NEW FULL ACCESS MEMBER
3. Select that the program is a RETENTION PROGRAM
 4. Select which customer group/s it is relevant to



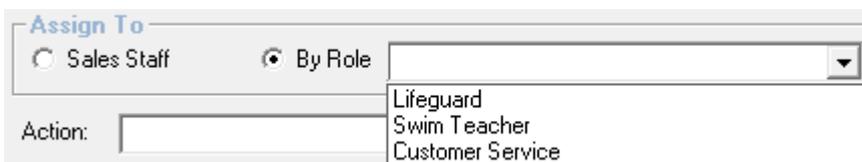
The screenshot shows a section titled 'Retention Program is to be used for:'. It contains three radio buttons: 'Prospect', 'Retention' (which is selected), and 'For Students'. To the right of 'Retention' are two checkboxes: 'For Memberships' (checked) and 'For Visit Passes'. A 'View Memberships / VP' button is located to the right of the checkboxes.

5. Click on the **View Memberships / VP** button to isolate certain membership types or leave to include all types
6. You can now begin to enter the steps that relate to the program
7. Enter a step description



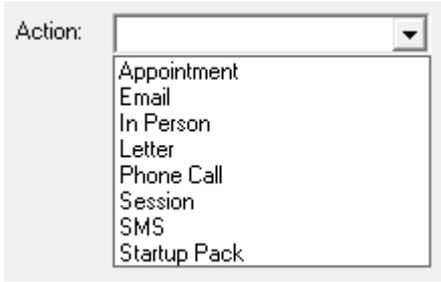
The screenshot shows a form titled 'Add New Step'. It has two input fields: 'Step #' with the value '1' and 'Step Name:' with the text 'Health Assessment'.

8. Enter the staff member or team that will complete the task. If sales staff is selected then when a customer is assigned to a program, it will ask the user which staff member the steps should be assigned to.



The screenshot shows a section titled 'Assign To'. It has two radio buttons: 'Sales Staff' and 'By Role' (which is selected). To the right of 'By Role' is a dropdown menu. Below the dropdown is an 'Action:' label followed by a text box. The dropdown menu is open, showing three options: 'Lifeguard', 'Swim Teacher', and 'Customer Service'.

9. Enter the action type for the step



The options available for each action will vary depending on the action type selected. Below will show and explain each of the options available

Appointment

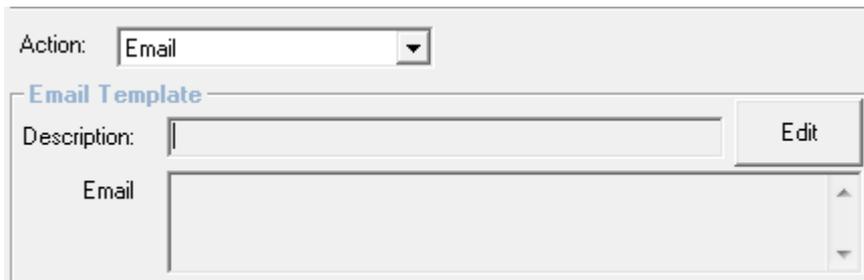
Either the appointments scheduler in the Point of Sale module or Facility can be used for retention step appointments. The benefits vary depending on the outcome required. The appointments scheduler is simple and basic to use, but has no billing options. The facility bookings module requires more setup but can have multiple facilities (or trainers) viewed at any one time and charges can be applied if required.

At each step level, you can choose which 'appointment' is selected. This will enable the users when actioning a customer's step access the correct appointment/facility type automatically.



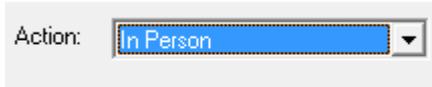
Email

An email template can be applied to the step, by the same manner that it is applied to a non attendance reminder. See the System Settings section of this user guide for further information.



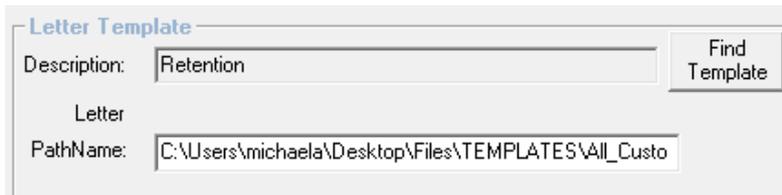
In Person

An action type of In Person is available; however it is assumed that this action type will be used when manual follow up is required.



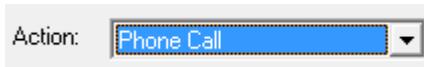
Letter

A letter template can be applied to the step provided it has been setup in the Letter Templates screen. See the System Settings section of this user guide for further information.



Phone Call

If the action type is phone call, then there are no templates or automation required.

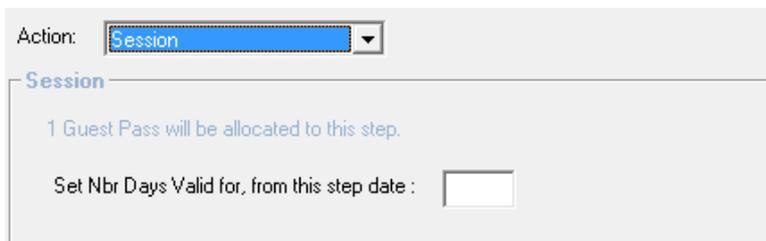


Session

You may wish to have a step that is a session for example;

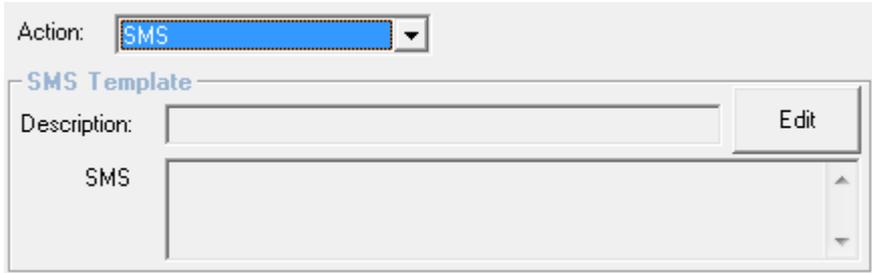
- Trial a group exercise class
- Trial the Living Longer Living Stronger program

As the user is not necessarily a member that is valid to go that session, then a guest pass is allocated to the customer so that they can access the session. You can choose a number of days that this guest pass stays valid for from the step date. For example the step is 7 days in the prospects program, and you want the pass to be valid for a further 7 days, in case it takes them another week to attend a session.



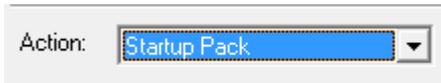
SMS

You can assign an SMS template to the step. See the System Settings section of this user guide for further information.



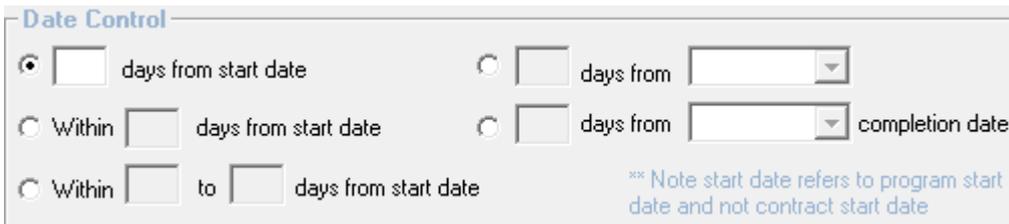
Start Up Pack

The start up pack step is designed so that if you wish to give a pack to a customer either when they first join or after sometime of being a customer then this step can be assigned with the relevant date. Quite often start up or joining packs are made up of physical items that can run out. If at the time of the start up pack being due to be handed out items is not available this step can be postponed until a later date. When the step is then due again this will show through card swipe, (customer attendance).



10. Enter the date control for this step
11. There are 5 date options available

There are 5 date options available:



- # days from start date

This will make the step due at a number of days for example

- Program is started on July 1st
- Date control for step is 7 days from start date
- The step becomes due on July 8th

- # days from a Step

This will make the step due the set number of days after the selected step.

- Within # days from start date

If this option is selected the step will show as due for all the days between the start of the program and the final day it is due. For example;

- Program starts on July 1st
- Date control for step is within 7 days from start date
- The step shows as due on;
 - July 1st, 2nd, 3rd, 4th, 6th, 7th & 8th
- # days from a Step Completion Date

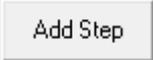
This will make the step due the set number of days after the selected step is completed.

- Within # to # days from start date

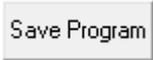
This will allow the step to display similar to within # days from start however the first date is not from the start of the program. For example within 7 to 14 days of the program start date.

12. Enter a description for the step if required. You may to for example enter what should be said in a phone call for this step. The description will show in the customers tracking screen so that staff can see what is required from the step.

Description:

13. Once all of the details of the step have been entered, click on the  button

14. You are now ready to add the next step of your program

15. Continue until all steps are completed and the click on the  button

System Settings

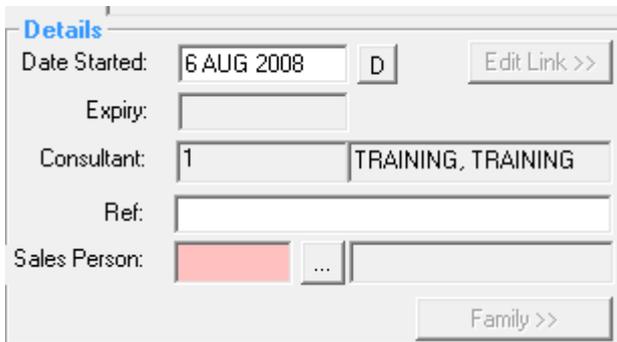
Admin> Retention> Retention Program Setup

There are some system settings that can be applied by location to the retention programs. These include non attendance reminders and general tasks to do.

Salesperson is Mandatory on all Contracts

If this option is selected a membership contract cannot be sold unless a sales person ID is assigned to the sale. The field will show as mandatory in the contract sales screen and the user will be prompted to complete this field before the membership can be processed.

Salesperson is Mandatory on all Contracts



Setting the Templates

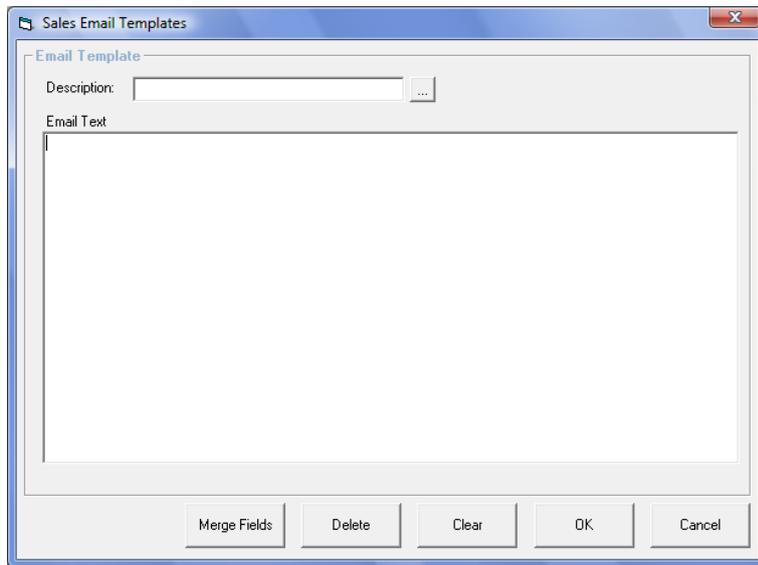
To assist automation of follow ups, users can set a template for a range of follow up methods including SMS, Emails & Letters.

1. Chose the follow up method

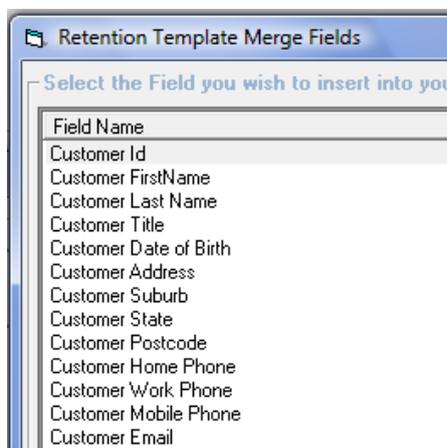


2. Click on the button to apply a template
3. The follow screen will appear depending on the action type selected

Email

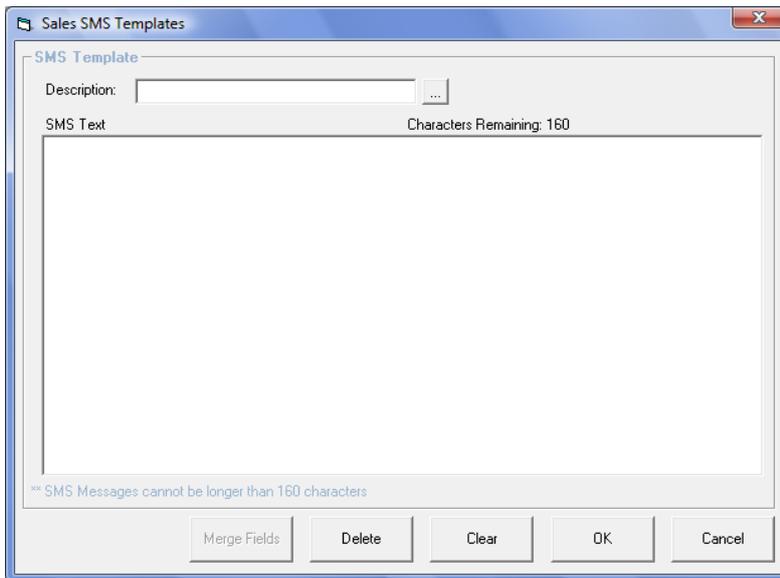


1. Enter an Email Template Description i.e. 30 day follow up email
2. Enter the text of the email template
 - a. Merge fields can also be included by selecting the  button
 - b. A range of fields are available

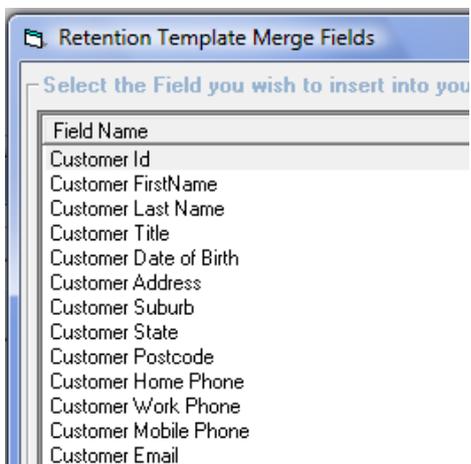


3. Click on OK to save the template
4. The template will now show as set

SMS



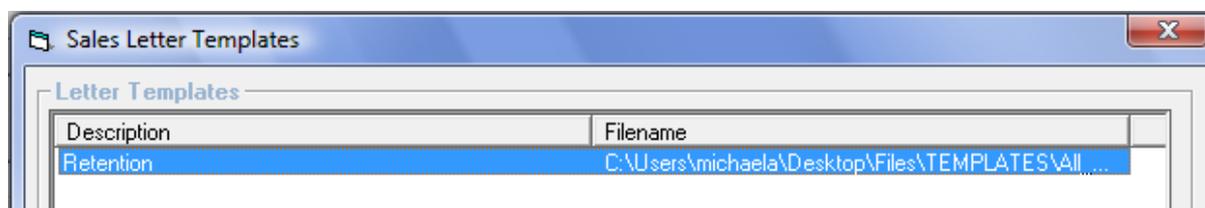
1. Enter a SMS Template Description i.e. 60 day follow up SMS
2. Enter the text of the SMS template
 - a. Merge fields can also be included by selecting the  button
 - b. A range of fields are available



3. Click on OK to save the template
4. The template will now show as set

Letter

When you select the letter option the letters that have been pre assigned to the retention data source will be viewable. See the Letter Templates section of this user guide for further information.



Adding Letter Templates

Before letter templates can be assigned to steps or non attendance reminders, they must first be setup in the letter templates screen. This screen is found in Admin> Letters> Templates. The data source for these is Retention. If you are unsure how to setup letter templates, please see the Admin user guide for further information.

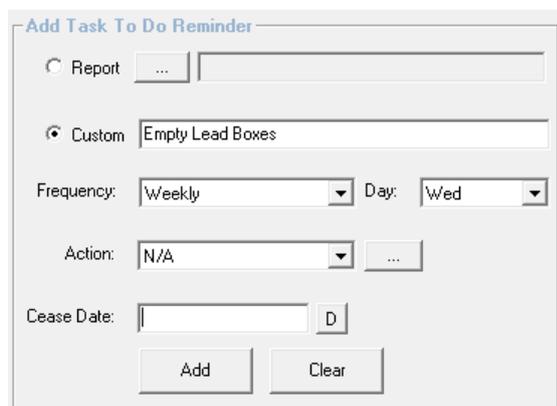
Setting Tasks to do Reminders

To avoid the missing of standard tasks, follow up reminders can be set for staff to mark that they have completed them. These may include items such;

- Empty Lead Boxes
- Hand out 7 day passes in the gym
- Contact Expired Members

You can also select to set reminders on reports so that they are not missed in either being printed or a mail merge sent from them.

1. Choose either a Report or enter a Custom follow up reminder
2. Select the frequency – Daily, Weekly, Fortnightly or On a Set Day of the Month
3. Enter the day (applicable for weekly and fortnightly)
4. Enter an action i.e. Print, Email, Mail Merge, Call or N/A these are setup as contact methods and can be added to as required
5. If this is only a short term task then a Cease Date can be entered, this may be applicable to tasks that are only valid for certain promotions



Add Task To Do Reminder

Report

Custom

Frequency: Day:

Action:

Cease Date:

Non Attendance Reminders

Admin> Retention> Retention Settings

To avoid the need to ensure that staff members are running reports to follow up on non attendance of membership holders these reminder parameters can be used to display customers on the sales management screen.

The criteria for the non attendance is that no attendance has been recorded against their membership contract are as many days as specified. The customer will continue to show until they have either attended or been marked as contacted. You can have 12 non attendance steps.

Non-Attendance		Action:	Template:	Template Set:
1st Contact:	<input type="text" value="30"/> days	<input type="text" value="SMS"/>	<input type="text" value="..."/>	✓
2nd Contact:	<input type="text" value="60"/> days	<input type="text" value="Phone Call"/>	<input type="text" value="..."/>	N/A
3rd Contact:	<input type="text" value="90"/> days	<input type="text" value="Letter"/>	<input type="text" value="..."/>	✓

For example;

Settings are for 30 days, 60 days and 90 days

A customer has not visited for 30 days

- They display in the 1st period of non attendance follow-ups

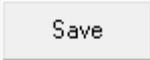
The customer is then contacted but doesn't attend

- They are removed from the 30 days contact list

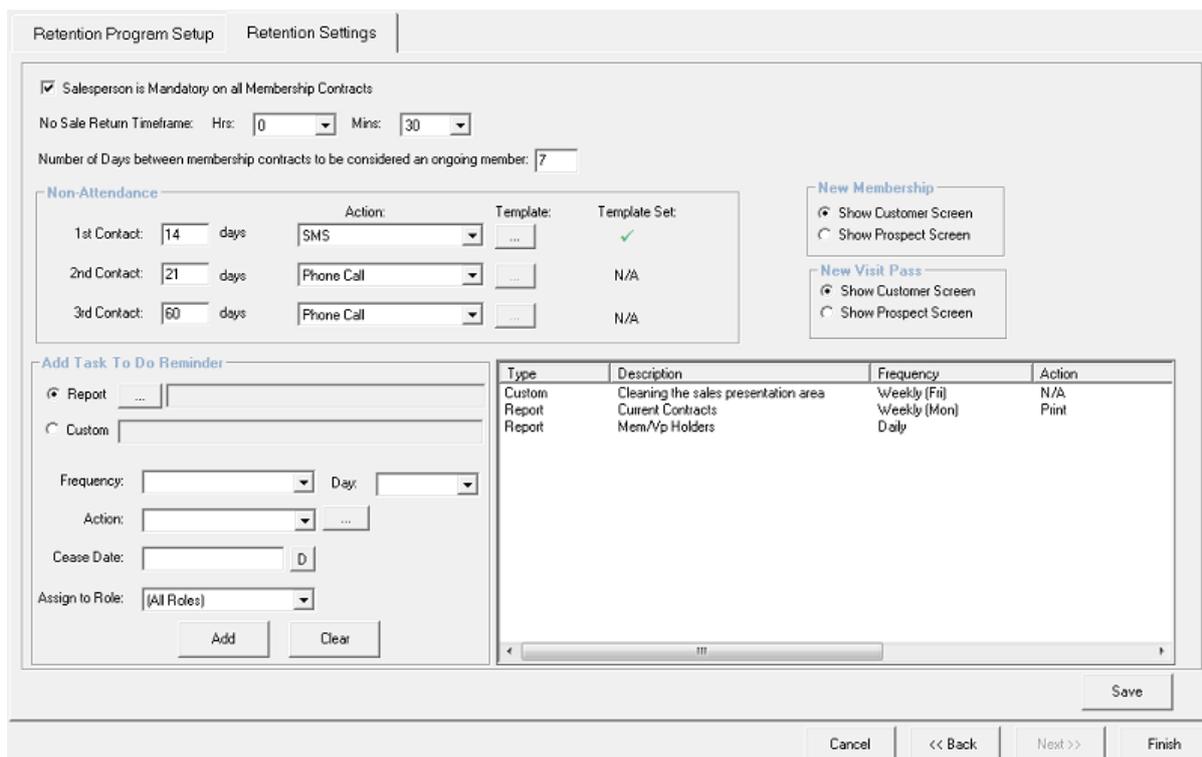
The customer then doesn't attend for a further 30 days so now 60 days in total

- The customer again appears on the 60 day follow up list and will be contacted again by the action set

Finalisation of Settings

Once all settings have been entered you must click on the  button to ensure that all settings are saved into the system.

Example Settings Screen



Type	Description	Frequency	Action
Custom Report	Cleaning the sales presentation area	Weekly (Fri)	N/A
Report	Current Contracts	Weekly (Mon)	Print
Report	Mem/Vp Holders	Daily	

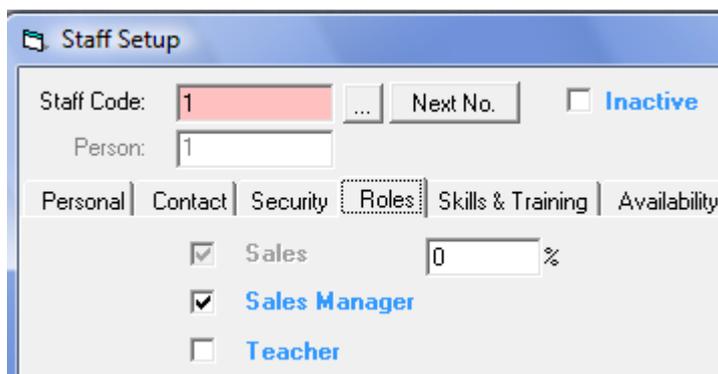
Sales Managers and Sales Staff Members

Admin> Security> Staff Members

There are certain functions that can only be completed by sales managers, for example;

- Viewing the entire workload
- Removing steps from a customer's program

To mark a staff member as a sales manager, check the option as sales manager.



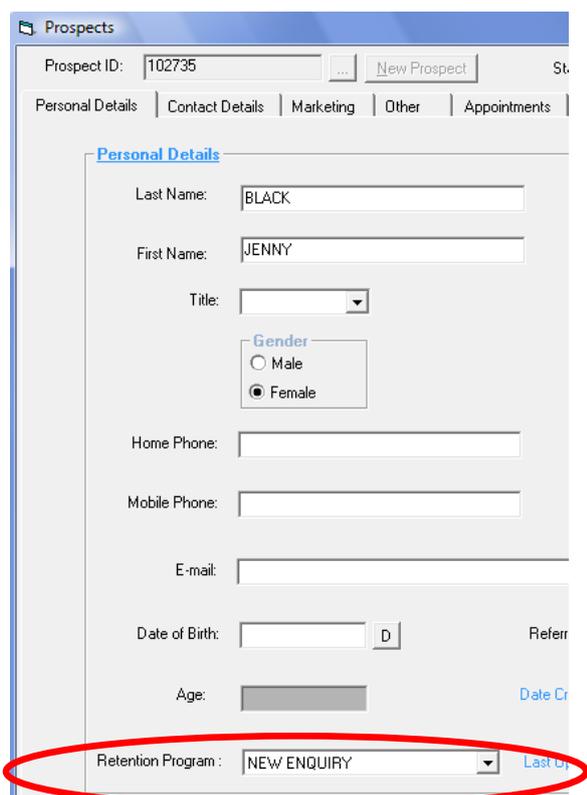
Assigning a Customer to a Program

Prospects, Members, Visit Pass Holders and Students can be assigned to a prospect or retention program as a part of their customer setup or sale. Any other customer group can also be assigned to a program manually. The drop down menus available for selection are automatically populated with the default program if a default is setup in the retention program setup screen.

Assigning Prospects to a Program

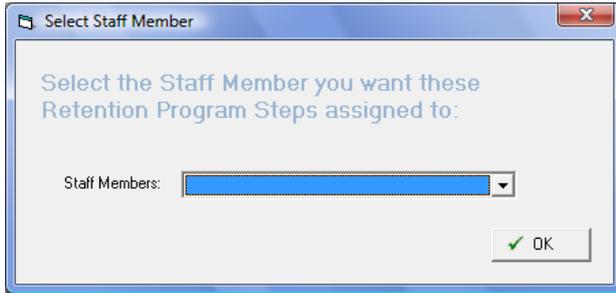
Point of Sale > Customers > Prospects

When you enter a prospect the prospect programs drop down will only be populated with those programs that are set for Prospects. This drop down is viewable in the bottom left and corner of the Personal Details tab. The prospect screen is designed to work from left to right. The final tab is the tracking tab, whereby you can view the steps that are a part of the program you have selected. See managing customers for further information on the view of these steps.



The screenshot shows the 'Prospects' application window. At the top, there is a 'Prospect ID' field containing '102735' and a 'New Prospect' button. Below this are several tabs: 'Personal Details', 'Contact Details', 'Marketing', 'Other', and 'Appointments'. The 'Personal Details' tab is selected and contains the following fields: 'Last Name' (BLACK), 'First Name' (JENNY), 'Title' (dropdown), 'Gender' (radio buttons for Male and Female, with Female selected), 'Home Phone', 'Mobile Phone', 'E-mail', 'Date of Birth' (calendar icon), 'Age' (calendar icon), and 'Retention Program' (dropdown menu showing 'NEW ENQUIRY'). The 'Retention Program' dropdown is circled in red.

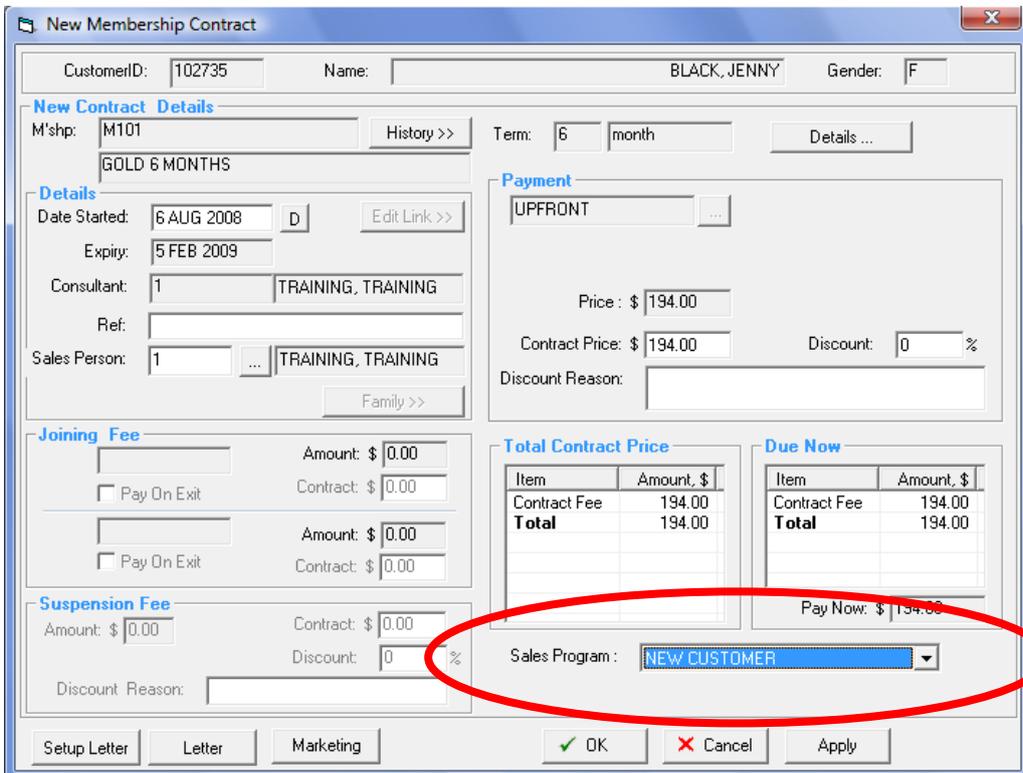
If the program you have selected has steps that are assigned to an individual sales staff member then the following screen will appear where you can select which staff member you wish the steps to be assigned to.



Assigning Members to a Program

Point of Sale > Customers > Customers > Marketing or when selling the membership

When you sell a membership contract the retention program drop down list is available in the bottom right hand corner of the screen. Again the default program will be listed here if one is setup as a default.



CustomerID: 102735 Name: BLACK, JENNY Gender: F

New Contract Details
 M'shp: M101 History >> Term: 6 month Details ...
 GOLD 6 MONTHS

Details
 Date Started: 6 AUG 2008 D Edit Link >>
 Expiry: 5 FEB 2009
 Consultant: 1 TRAINING, TRAINING
 Ref:
 Sales Person: 1 TRAINING, TRAINING
 Family >>

Payment
 UPFRONT ...
 Price: \$ 194.00
 Contract Price: \$ 194.00 Discount: 0 %
 Discount Reason:

Joining Fee
 Amount: \$ 0.00 Contract: \$ 0.00
 Pay On Exit
 Amount: \$ 0.00 Contract: \$ 0.00
 Pay On Exit

Suspension Fee
 Amount: \$ 0.00 Contract: \$ 0.00
 Discount: 0 %
 Discount Reason:

Total Contract Price

Item	Amount, \$
Contract Fee	194.00
Total	194.00

Due Now

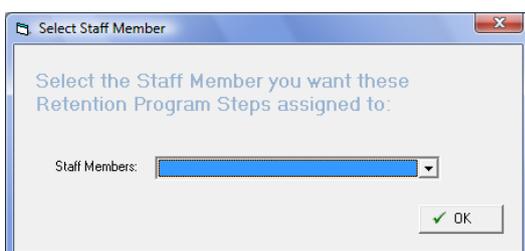
Item	Amount, \$
Contract Fee	194.00
Total	194.00

Pay Now: \$ 194.00

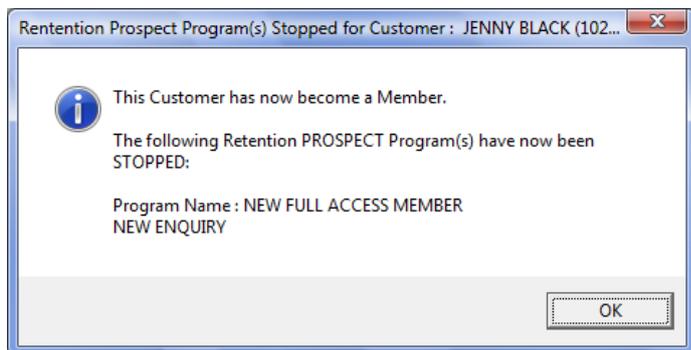
Sales Program: **NEW CUSTOMER**

Buttons: Setup Letter Letter Marketing OK Cancel Apply

If the program you have selected has steps that are assigned to an individual sales staff member then the following screen will appear where you can select which staff member you wish the steps to be assigned to.



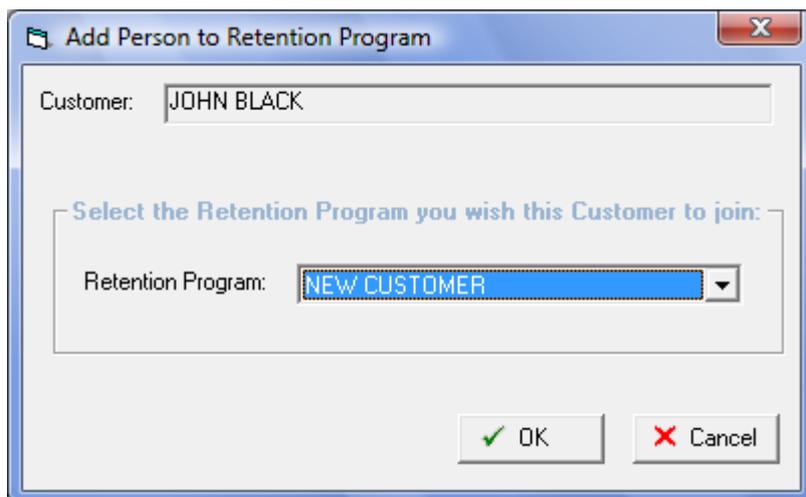
In the case where a customer was already on a prospect program this program will be stopped by the purchase of a membership



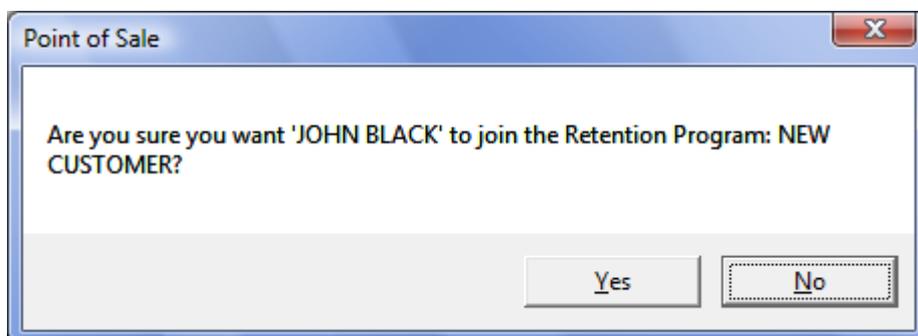
Assigning Visit Pass Holders to a Program

Point of Sale> Customers> Customers> Marketing or when selling the Visit Pass

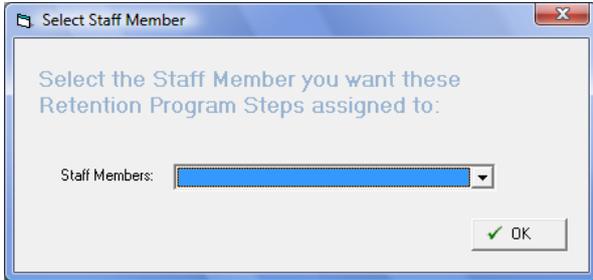
A separate screen is displayed when a customer is sold a visit pass that is allocated to a sales program. This screen will not be displayed unless the visit pass type is assigned to a particular sales program. This screen is displayed after the transaction is finalised.



Then this screen displays



If the program you have selected has steps that are assigned to an individual sales staff member then the following screen will appear where you can select which staff member you wish the steps to be assigned to.



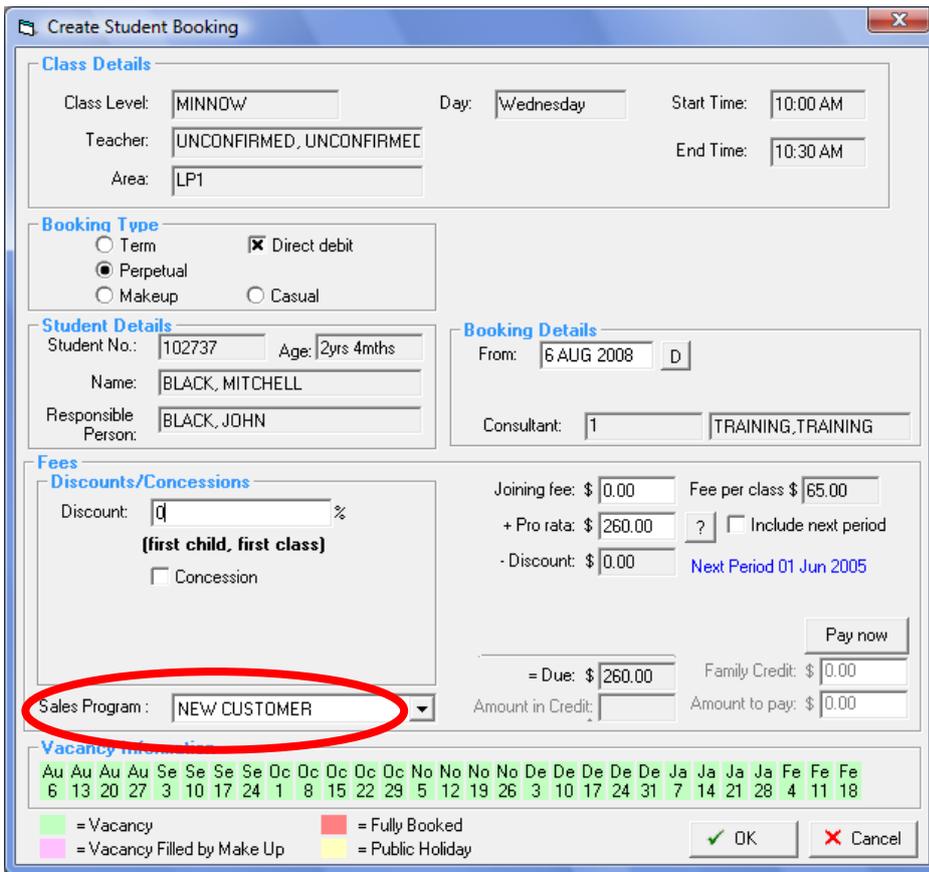
Select the Staff Member you want these Retention Program Steps assigned to:

Staff Members:

Assigning Students to a Program

Point of Sale > Customers > Customers > Marketing or when signing the Student up to a class

Students like members or visit pass holders can be assigned to a program. There may be a different program for students and this is depicted by the class types and settings that are assigned to the program in its initial setup. If you only have one program that is allocated to students then only this one program will be shown in the booking screen. The drop down is available from the bottom left hand side of the create student booking screen.



Create Student Booking

Class Details

Class Level: MINNOW Day: Wednesday Start Time: 10:00 AM
 Teacher: UNCONFIRMED, UNCONFIRMED End Time: 10:30 AM
 Area: LP1

Booking Type

Term Direct debit
 Perpetual
 Makeup Casual

Student Details

Student No.: 102737 Age: 2yrs 4mths
 Name: BLACK, MITCHELL
 Responsible Person: BLACK, JOHN

Booking Details

From: 6 AUG 2008 D
 Consultant: 1 TRAINING, TRAINING

Fees

Discounts/Concessions

Discount: 0%
{first child, first class}
 Concession

Joining fee: \$ 0.00 Fee per class \$ 65.00
 + Pro rata: \$ 260.00 ? Include next period
 - Discount: \$ 0.00 Next Period 01 Jun 2005

= Due: \$ 260.00 Family Credit: \$ 0.00
 Amount in Credit: Amount to pay: \$ 0.00

Sales Program: **NEW CUSTOMER**

Vacancy Information

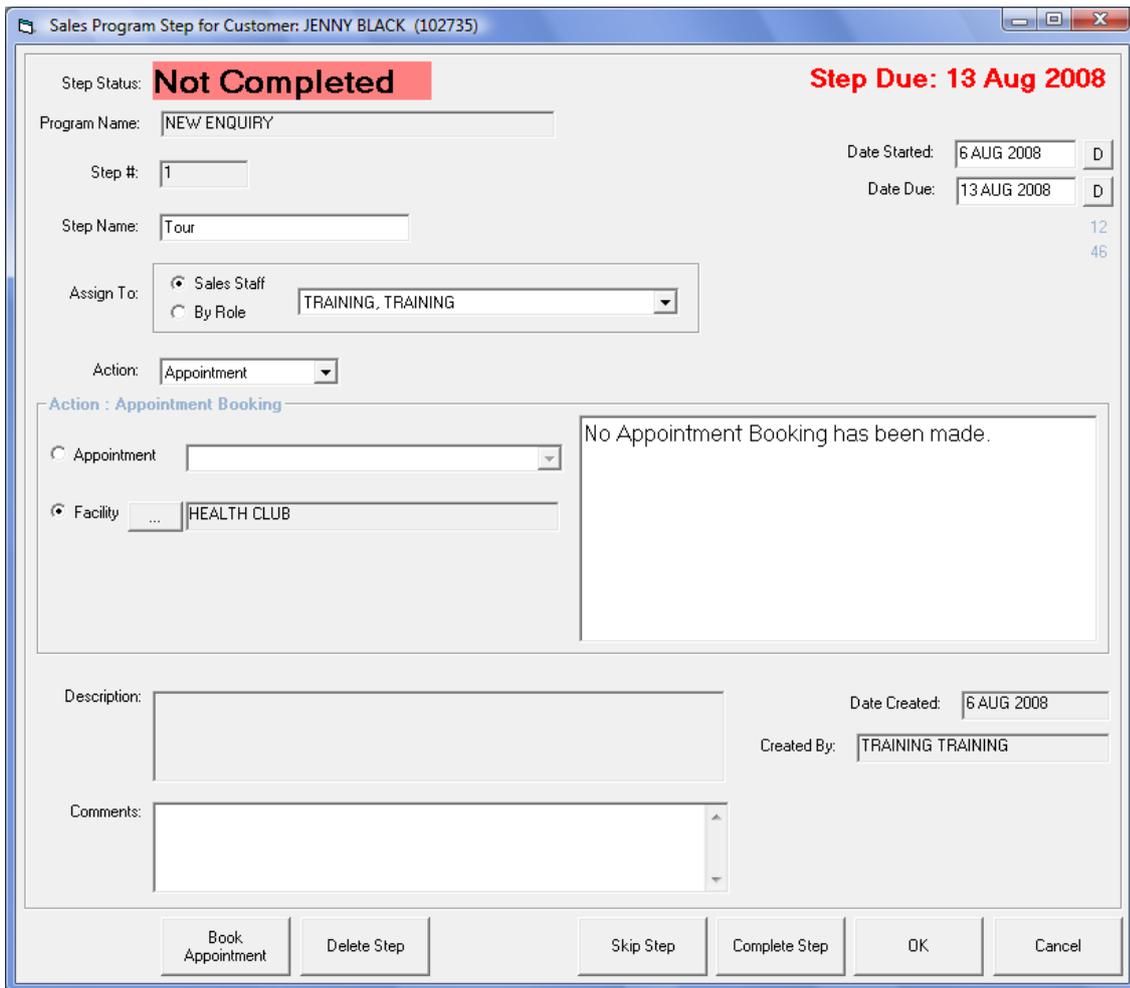
Au	Au	Au	Au	Se	Se	Se	Se	Oc	Oc	Oc	Oc	Oc	No	No	No	No	De	De	De	De	De	Ja	Ja	Ja	Ja	Fe	Fe	Fe
6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31	7	14	21	28	4	11	18

= Vacancy = Fully Booked
 = Vacancy Filled by Make Up = Public Holiday

Managing your Programs

Steps Due Today

When you setup a program any steps that are due on that day or due within a number of days from the start date, will pop up on the screen for you to action immediately. For example, a centre tour is the first item booked for a prospect. As soon as the prospect is entered and the record is saved the following screen appears:



At anytime that you open the prospect or customer marketing screen, if a step is due today or from today onwards it will display as requiring action. You can either make a comment on this screen or click OK to complete it at another stage or action the step at the time.

Booking Appointments from the Steps Screen



Clicking on the **Book Appointment** button will take you through to the appointments screen or the facility booking search screen depending on the appointment type setup. You will see below that this takes you through to the facility search screen where dates/times can be selected to narrow your search.

Visual Scheduler Filters

Apply the following filters to the search:

Available  

Centre Facilities

DEMO LOC 1 DEMO LOC 2 DEMO LOC 3 DEMO LOC 4

Selected Facility Name
DEMO LOC 1 > Personal Trainers

Filters

Between: 10 JAN 2013 D and: D

Between: and:

Days

All Monday Tuesday Wednesday
 Thursday Friday Saturday Sunday

Calculate OffPeak Charge

Results

Facility	Date	From Time	To Time

Select All

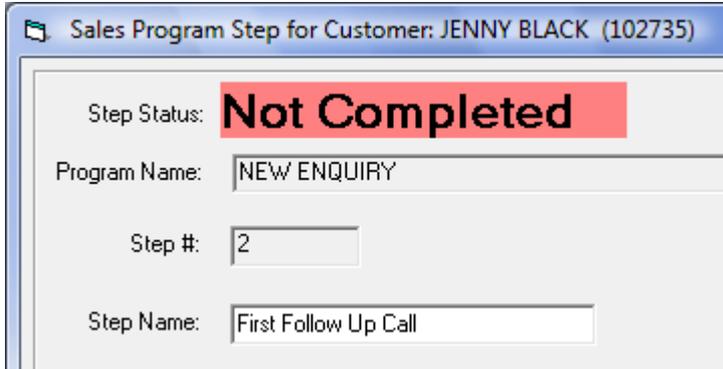
** Double click on Facility will add to list

1. Enter available times to and from
2. Click on
3. The times available will be displayed in the results pane
4. Click on the booking time you wish to accept and click on

Facility	Date	From Time	To Time
<input type="checkbox"/> Personal Trainers	Thu 10 Jan 2013	09:00 AM	09:15 AM
<input type="checkbox"/> Personal Trainers	Thu 10 Jan 2013	09:15 AM	09:30 AM
<input type="checkbox"/> Personal Trainers	Thu 10 Jan 2013	09:30 AM	09:45 AM
<input type="checkbox"/> Personal Trainers	Thu 10 Jan 2013	09:45 AM	10:00 AM

Not Completed Steps

When a step has had no action made against it, and it is not yet overdue its status will be not completed.



Sales Program Step for Customer: JENNY BLACK (102735)

Step Status: **Not Completed**

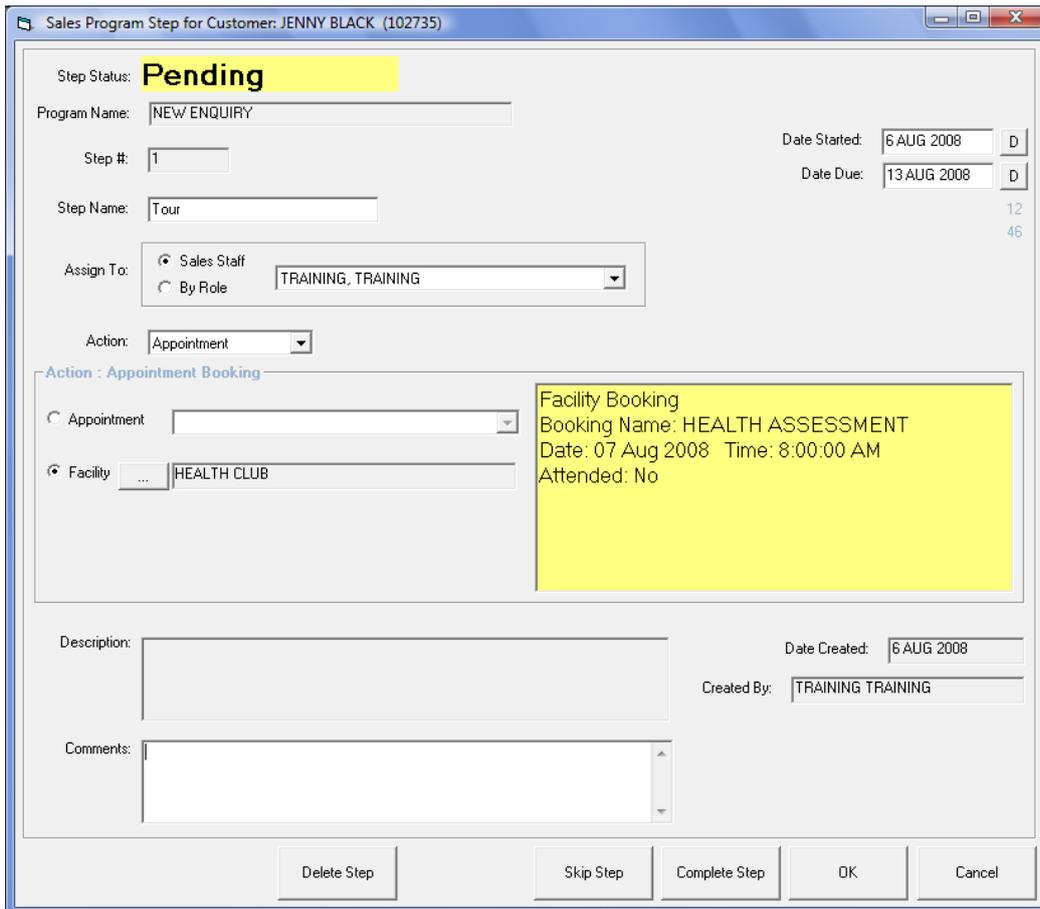
Program Name: NEW ENQUIRY

Step #: 2

Step Name: First Follow Up Call

Pending Steps

When an appointment is booked, but the appointment is in the future, the status is marked as pending.



Sales Program Step for Customer: JENNY BLACK (102735)

Step Status: **Pending**

Program Name: NEW ENQUIRY

Step #: 1

Step Name: Tour

Date Started: 6 AUG 2008

Date Due: 13 AUG 2008

Assign To: Sales Staff By Role TRAINING, TRAINING

Action: Appointment

Action : Appointment Booking

Appointment

Facility HEALTH CLUB

Facility Booking
 Booking Name: HEALTH ASSESSMENT
 Date: 07 Aug 2008 Time: 8:00:00 AM
 Attended: No

Description:

Comments:

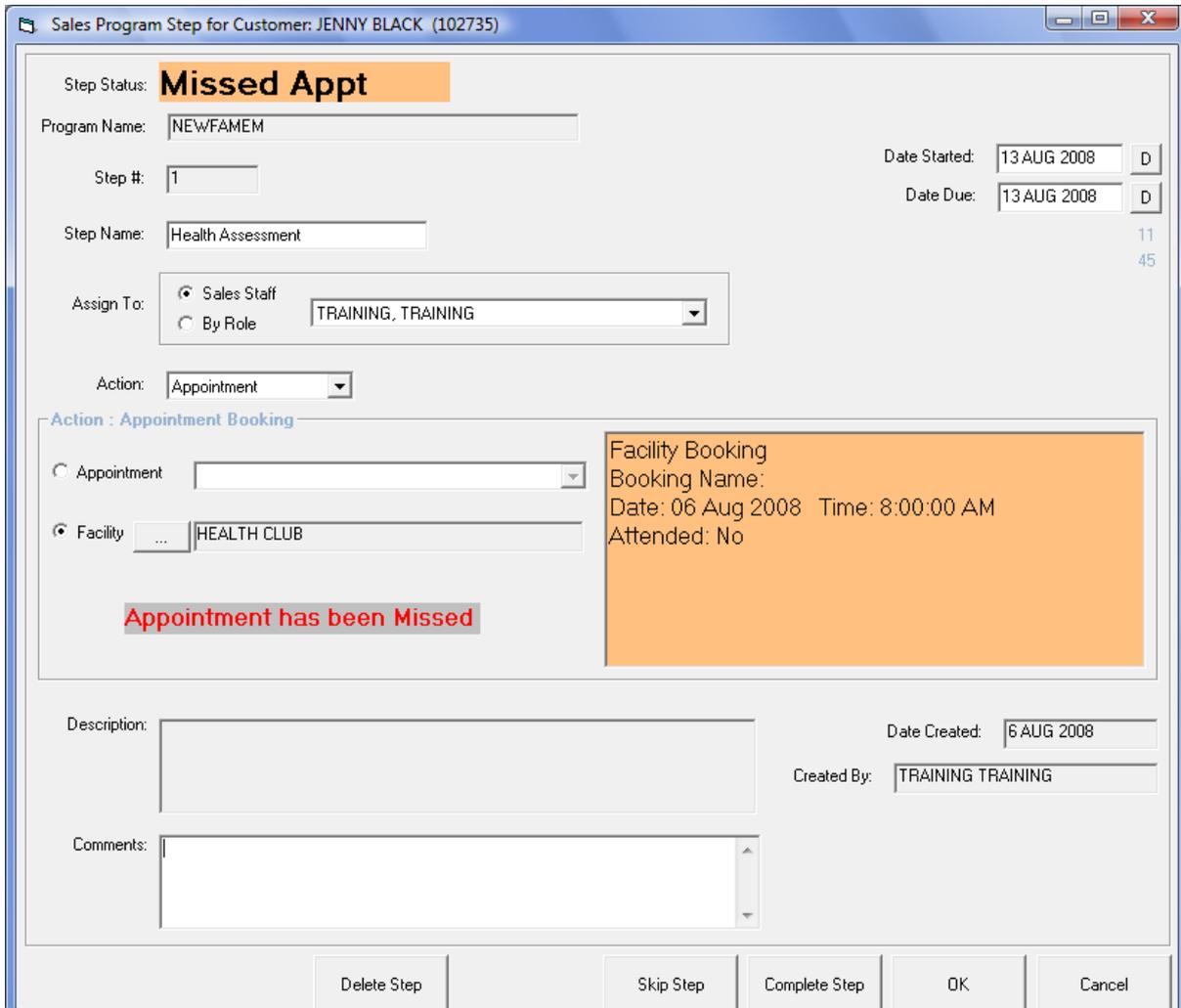
Date Created: 6 AUG 2008

Created By: TRAINING TRAINING

Buttons: Delete Step, Skip Step, Complete Step, OK, Cancel

Missed Appointment Steps

If an appointment has been booked against a step but then the appointment is then not attended the status will be automatically changed to Missed Appointment. These steps will then show as Missed Appointments in the Management screen.

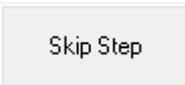


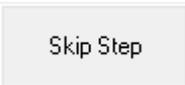
Rebooking Missed Appointment

To rebook a missed appointment, go into appointments or facility bookings and cancel and rebook the appointment without leaving the screen. The missed appointment will disappear from the missed appointment list and the step the appointment is linked to will be updated.

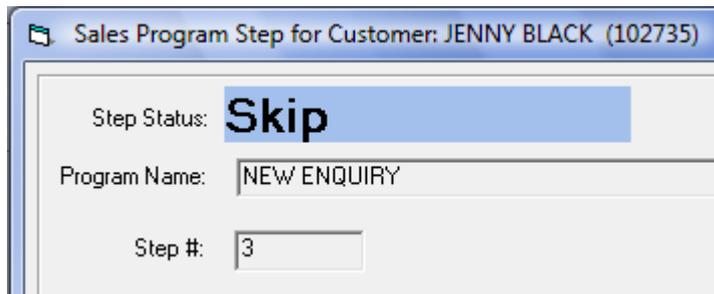
Skipping steps

In some cases steps will not be required, for example a customer does not want to complete a program show as they have been a regular trainer for a long time, but would still like a program written for them.



To skip a step click on the  button at the bottom of the step for a customer screen

The status will now show as skipped



Sales Program Step for Customer: JENNY BLACK (102735)

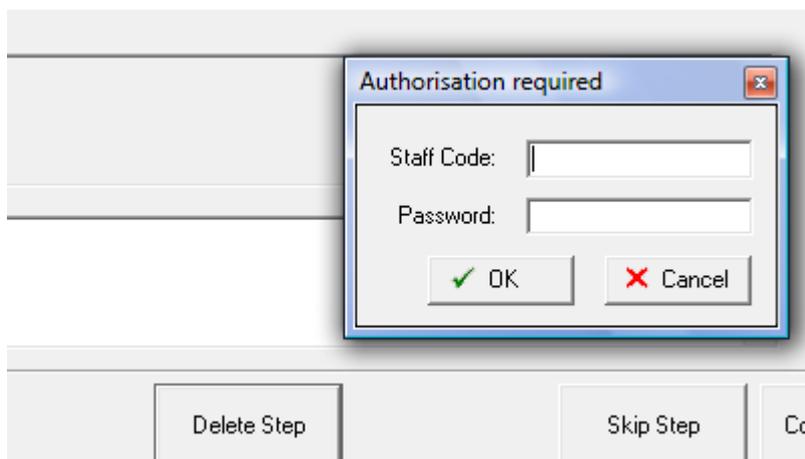
Step Status: **Skip**

Program Name: NEW ENQUIRY

Step #: 3

Deleting steps

There may be cases where a step is deleted. In this case you must be a sales manager to delete a step. A deleted step will be removed; however the action of the deletion will be trapped in the customer changes log for the program. See System Settings section for marking staff as sales managers.



Authorisation required

Staff Code:

Password:

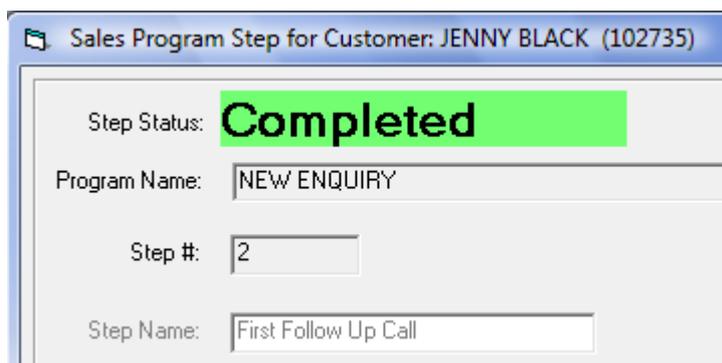
OK Cancel

Delete Step Skip Step Cor

Completing steps

In some cases a step will be completed automatically, for example when a SMS or letter is sent the step is marked as completed, or when an appointment is attended. For In Person, Phone Call and Start up Pack type steps, the complete step button will need to be used to complete the step.

Note: This is also done in bulk through the management screen



Sales Program Step for Customer: JENNY BLACK (102735)

Step Status: **Completed**

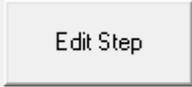
Program Name: NEW ENQUIRY

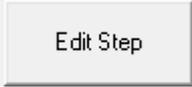
Step #: 2

Step Name: First Follow Up Call

Editing Steps

Once a step has been completed it can be edited if required. Any changes to the step are trapped in the changes log. Editing the step removes any previous completion or skipping, and returns the status back to Not Completed.



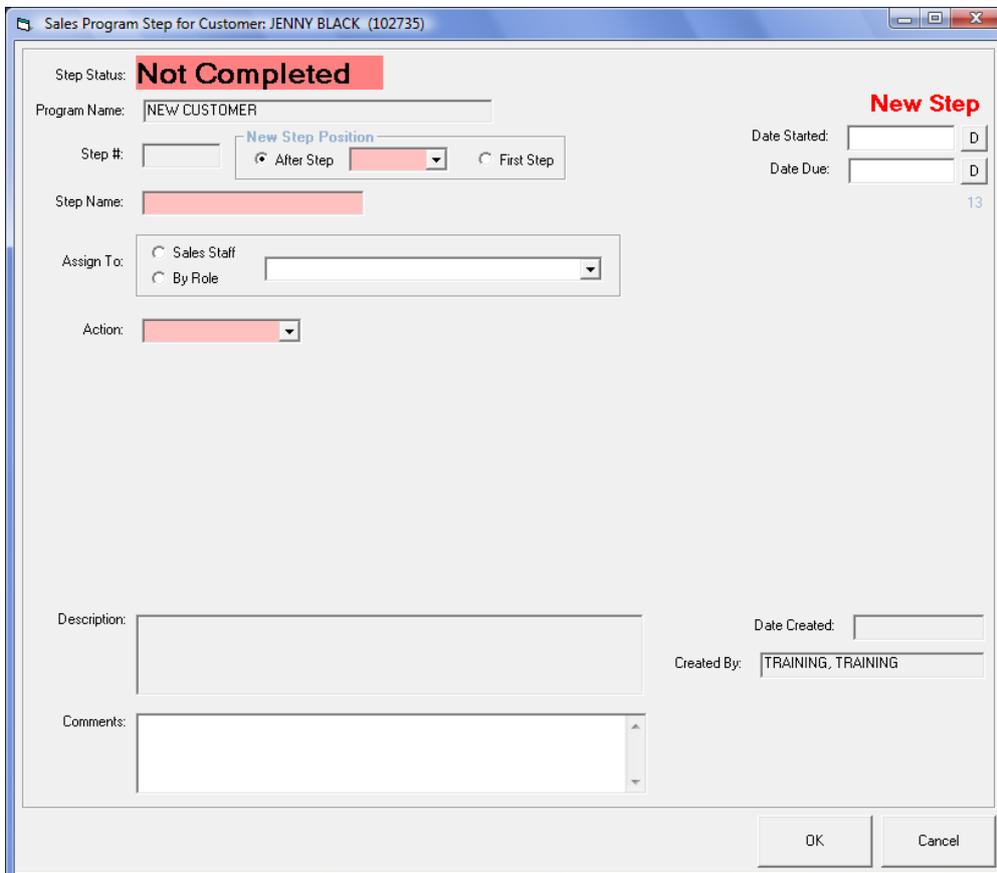
By clicking on the  the status will be returned to Not Completed.

Adding a Step

You can manually add a step for an individual customer. This will affect only the customer it is set for. This is complete from either the prospect or customer marketing screen.



1. Click on . The steps screen will now be displayed
2. Complete the fields as you would for setting up a step for the entire program
3. You will need to select the position the step takes based on which step it follows
4. A description cannot be entered for a step entered on the fly only comments
5. An example of such a step may be an extra follow up call or extra free program show

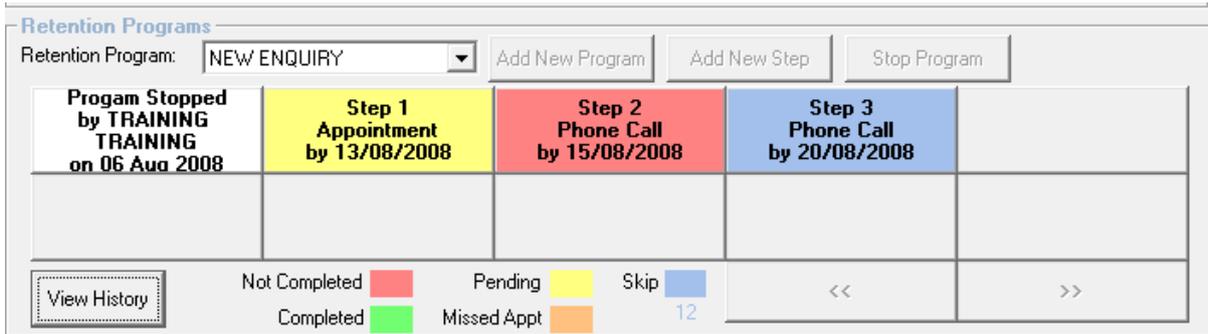


Stopping a Program

Prospect programs will be stopped when that customer is sold a membership. You can also choose to manually stop a program, for example the prospect turns to a dead lead.

To stop a program click on the  button above the displayed steps. You will see that the first cell is now displaying the programs status

Note: You must be a sales manager to stop a program manually



The screenshot shows the 'Retention Programs' interface. At the top, there is a dropdown menu for 'Retention Program' set to 'NEW ENQUIRY', and three buttons: 'Add New Program', 'Add New Step', and 'Stop Program'. Below this is a table with four columns representing program steps:

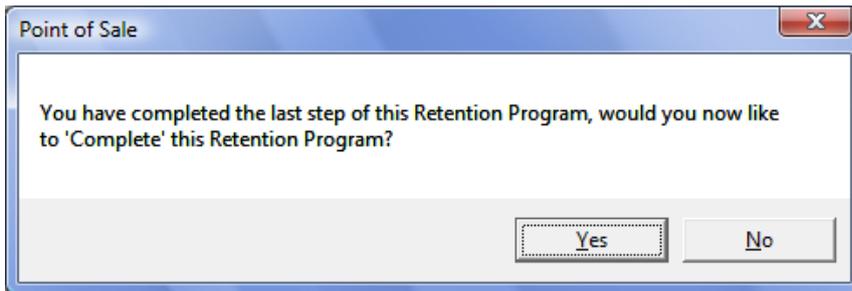
Program Stopped by TRAINING TRAINING on 06 Aug 2008	Step 1 Appointment by 13/08/2008	Step 2 Phone Call by 15/08/2008	Step 3 Phone Call by 20/08/2008

Below the table is a legend for step statuses: Not Completed (red), Pending (yellow), Skip (blue), Completed (green), and Missed Appt (orange). There is also a 'View History' button and navigation arrows. A small '12' is visible in the legend area.

Completing a Program

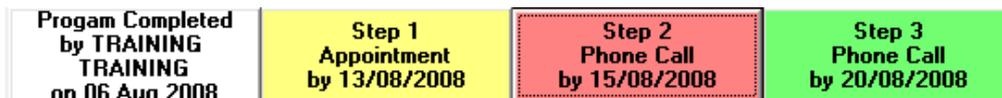
Whenever the last step in the program is actioned, either completed or skipped you will be asked if you wish to complete the program. The internal status for reporting is different between completed and stopped. Completed means that everything that was required to be done is considered done, whereas stopped shows that certain parts of the program were forgone.

Upon actioning of the last step the following message will be displayed



The screenshot shows a 'Point of Sale' dialog box with the following text: 'You have completed the last step of this Retention Program, would you now like to 'Complete' this Retention Program?'. At the bottom, there are two buttons: 'Yes' and 'No'.

If you click YES the program will be marked as completed. Selecting NO will leave it as uncompleted and even though all steps may be completed, it will not be seen as completed from a reporting point of view.

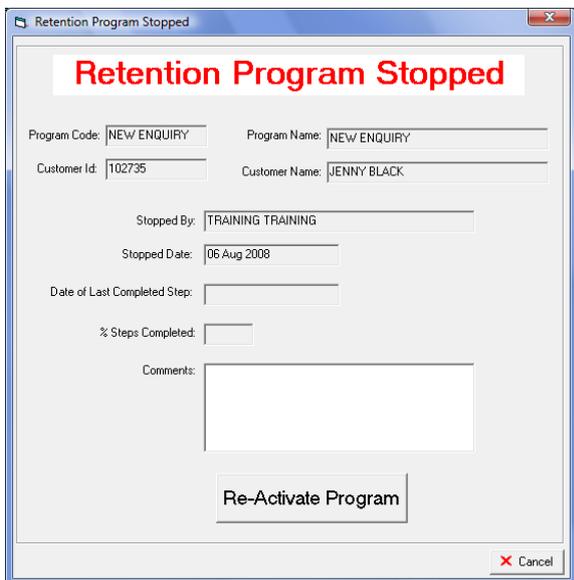


The screenshot shows the 'Retention Programs' interface with the program status updated. The first cell now says 'Program Completed by TRAINING TRAINING on 06 Aug 2008'. The other steps remain the same:

Program Completed by TRAINING TRAINING on 06 Aug 2008	Step 1 Appointment by 13/08/2008	Step 2 Phone Call by 15/08/2008	Step 3 Phone Call by 20/08/2008
--	---	--	--

Reactivating a Program

In some cases a program may have been accidentally stopped or completed. If a staff member has the appropriate rights (Sales Manager), they can click on the white Program Completed Button and the following screen will appear. Click on the Re-Activate Program button to activate.



Retention Program Stopped

Program Code: NEW ENQUIRY Program Name: NEW ENQUIRY

Customer Id: 102735 Customer Name: JENNY BLACK

Stopped By: TRAINING TRAINING

Stopped Date: 06 Aug 2008

Date of Last Completed Step:

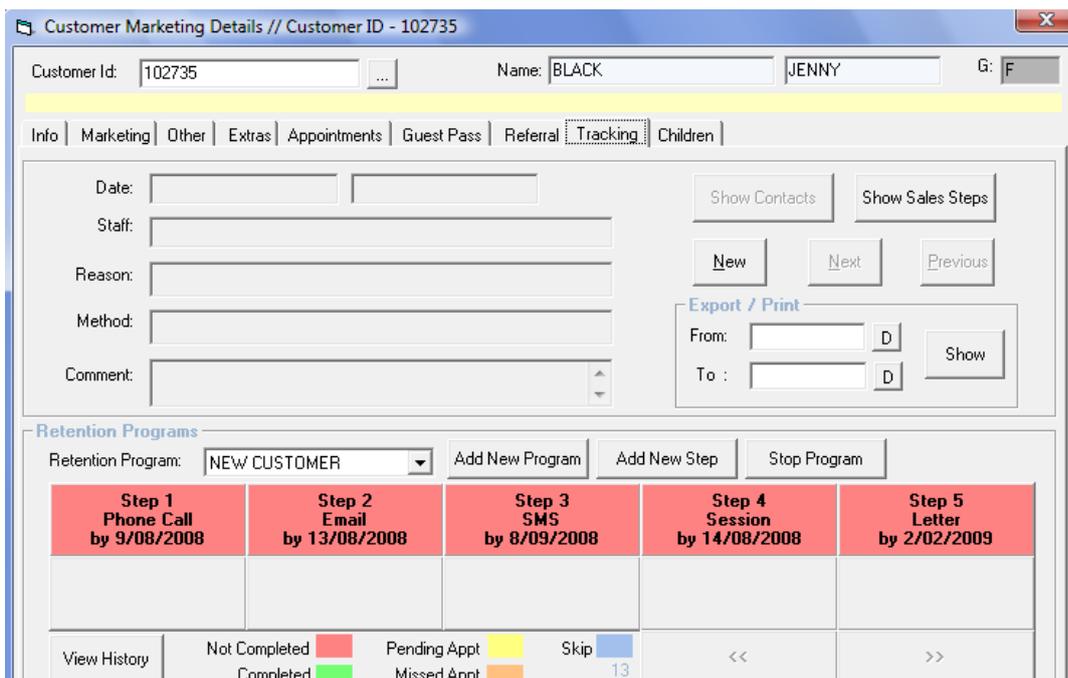
% Steps Completed:

Comments:

Re-Activate Program

Viewing Programs on an Individual Basis

Programs can be viewed in both the Customer Marketing and Prospect screens. The most active program will be displayed by default and then you can switch to other programs if required. For example a customer is now a member but was in the past a prospect. Their prospect program is still viewable by changing the drop down, however by default their membership retention program is displayed.



Customer Marketing Details // Customer ID - 102735

Customer Id: 102735 Name: BLACK JENNY G: F

Info | Marketing | Other | Extras | Appointments | Guest Pass | Referral | Tracking | Children

Date: Show Contacts Show Sales Steps

Staff:

Reason:

Method:

Comment:

New Next Previous

Export / Print

From: D Show

To: D

Retention Programs

Retention Program: NEW CUSTOMER Add New Program Add New Step Stop Program

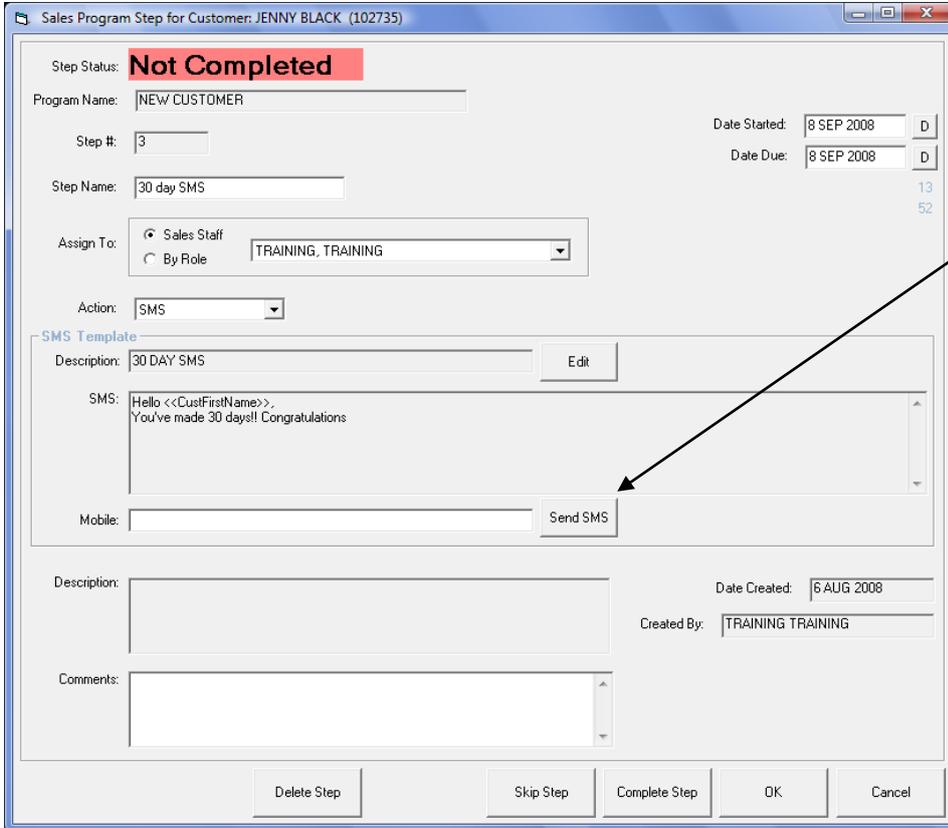
Step 1 Phone Call by 9/08/2008	Step 2 Email by 13/08/2008	Step 3 SMS by 8/09/2008	Step 4 Session by 14/08/2008	Step 5 Letter by 2/02/2009
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

View History Not Completed ■ Pending Appt ■ Skip ■ << >>

Completed ■ Missed Appt ■ 13

Each of the steps can be viewed for further information or actioning by clicking on the button.

For example, by clicking on Step 3 SMS the following screen will appear:



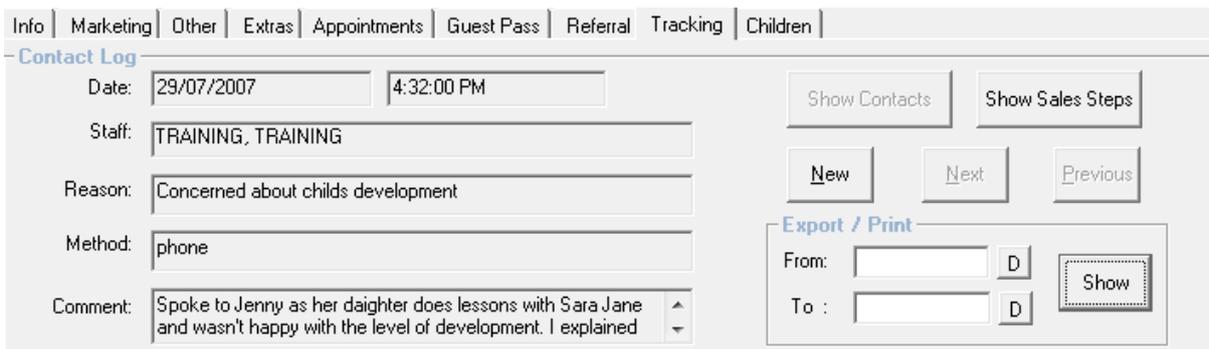
Hint: Click on SMS to send this SMS manually. If the mobile number is not here, you can add it and it will update to the customer profile.

If you choose not to send an SMS you can select any of the buttons with the action you would like to do.

Viewing Past Actions

Once steps are actioned and completed, the details are displayed in the top section of the tracking screen. The show contacts and show sales steps buttons switch between manual actions created and those that are contacts based on the steps of a retention program.

You can see in the below screen that a contact log entry for swim lessons discussions is displayed.



Show Sales Steps

If you then click on the **Show Sales Steps** button you will see now that the past completed steps are displayed.

Info | Marketing | Other | Extras | Appointments | Guest Pass | Referral | Tracking | Children

Sales Program: **NEW ENQUIRY** Step Nbr: 3

Date Due: 20/08/2008

Staff: BLACK,JENNY

Step Name: 2nd Follow Up Call

Action: Phone Call

Comment:

Show Contacts Show Sales Steps

New Next Previous

Export / Print

From: [] D Show

To : [] D

Exporting & Printing History of Contacts

You can export and print the contact logs and sales steps as required.

1. Click on the Show button

Export / Print

From: [] D Show

To : [] D

2. The following screen will display

Export / Print Contacts or Sales Steps

First Name: JENNY Last Name: BLACK Refresh

From Date: [] D To Date: [] D

Contact Log:

Date	Time	Staff	Reason	Method	Comment
29/07/2007	4:32:00 PM	TRAINING, TRAINING	Concerned about child's devel...	phone	Spoke to Jenny as her daughter does lessons with Sa

Sales Program Steps: Sales Program: NEW CUSTOMER

Sales Program	Step Nbr	Step Name	Date Due	Status	Step Action	Staff	Date Created	Step Origin	Comments
NEW CUSTOMER	1	3 day follow up call	9/08/2008	Not Completed	Phone Call	TRAINING, TR...	6/08/2008	Sales Program	
NEW CUSTOMER	2	7 day letter	13/08/2008	Not Completed	Email	TRAINING, TR...	6/08/2008	Sales Program	
NEW CUSTOMER	3	30 day SMS	8/09/2008	Not Completed	SMS	TRAINING, TR...	6/08/2008	Sales Program	
NEW CUSTOMER	4	Session	14/08/2008	Not Completed	Session	TRAINING, TR...	6/08/2008	Sales Program	
NEW CUSTOMER	5	180 Loyalty Letter	2/02/2009	Not Completed	Letter	TRAINING, TR...	6/08/2008	Sales Program	

Contact Log: Export Contact Log Print Contact Log

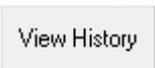
Sales Program Steps: Export Sales Steps Print Sales Steps

All (Contact Log and Sales Steps): Export All Print All

Close

3. Choose your filter options if required
4. Choose the Retention program if required
5. Choose one of the export or print options

Viewing History of Program Changes

Anytime a step is actioned, deleted, skipped or steps are added this is recorded in the changes log. This log is viewable from the  button left of the seen steps

Retention Programs

Retention Program: **NEW ENQUIRY** Add New Program Add

Program Stopped by TRAINING TRAINING on 06 Aug 2008	Step 1 Appointment by 13/08/2008	Step 2 Phone Call by 15/08/2008

View History Not Completed ■ Pending Appt ■ Skip ■
 Completed ■ Missed Appt ■ 12

Retention Program History

Program Code: **NEW ENQUIRY** Program Name: **NEW ENQUIRY** 12

Customer Id: **102735** Customer Name: **JENNY BLACK**

Date	Time	By Staff	Reason	Step Nbr	Step Name	Step Action	Comments
06 Aug 2008	5:17:00 PM	TRAINING TRAINING	Program Started				
06 Aug 2008	5:53:00 PM	TRAINING TRAINING	Facility Appointment Booked	1	Tour	Appointment	
06 Aug 2008	5:58:00 PM	TRAINING TRAINING	Facility Appointment Booked	1	Tour	Appointment	
06 Aug 2008	6:05:00 PM	TRAINING TRAINING	Step Added	3	2nd Follow Up Call	Phone Call	
06 Aug 2008	6:07:00 PM	TRAINING TRAINING	Step Skipped	3	2nd Follow Up Call	Phone Call	
06 Aug 2008	6:09:00 PM	TRAINING TRAINING	Step Added	4	Last chance SMS	SMS	
06 Aug 2008	6:24:00 PM	TRAINING TRAINING	Step Deleted	4	Last chance SMS	SMS	
06 Aug 2008	6:24:00 PM	TRAINING TRAINING	Step Completed	2	First Follow Up Call	Phone Call	
06 Aug 2008	6:25:00 PM	TRAINING TRAINING	Step Edited	2	First Follow Up Call	Phone Call	
06 Aug 2008	6:28:00 PM	TRAINING TRAINING	Program Stopped				
06 Aug 2008	6:31:00 PM	TRAINING TRAINING	Program Re-Activated				
06 Aug 2008	6:31:00 PM	TRAINING TRAINING	Step Edited	3	2nd Follow Up Call	Phone Call	
06 Aug 2008	6:31:00 PM	TRAINING TRAINING	Step Completed	3	2nd Follow Up Call	Phone Call	
06 Aug 2008	6:33:00 PM	TRAINING TRAINING	Program Completed				
06 Aug 2008	6:35:00 PM	TRAINING TRAINING	Program Re-Activated				
06 Aug 2008	6:38:00 PM	TRAINING TRAINING	Program Stopped				Prospect Program STOPPED, customer has be

Print Close

Customer Correspondence

If a customer does not want to receive emails or SMS's then the steps assigned with those actions will be automatically skipped.

Retention Programs

Retention Program: **NEW CUSTOMER**

Step 1 Phone Call by 9/08/2008	Step 2 Email by 13/08/2008	Step 3 SMS by 8/09/2008	Step 4 Session by 14/08/2008	Step 5 Letter by 2/02/2009

View History Not Completed ■ Pending Appt ■ Skip ■ 13
 Completed ■ Missed Appt ■ << >>



To set this go into the customer's marketing details, select **Personal** which will take you the customer set up screen. There select tab 'Others' and then mark the correspondence the customer wishes to receive.

Correspondence

- All Correspondence
- Links Emails
- Links SMS

Daily Management from the Management Screen

Marking items as completed

On the bottom left hand corner of the Retention management screen is Tasks To Do. In this screen any tasks that have been set will show up here.

Tasks To Do

Tasks List			
Date	Task	Type	Completed
15/10/2008	Cleaning checklist compl...	In person	<input type="checkbox"/>
15/10/2008	Missed gym appointment...	Phone Call	<input type="checkbox"/>
14/10/2008	Missed gym appointment...	Phone Call	<input type="checkbox"/>

If an item is highlighted in red that 'Task To Do' is overdue.

To complete a task click the completed box next to the task and it will be deleted from the screen. The same task may pop up again if it is a reoccurring task. E.g. weekly, fortnightly etc

Non-Attendance

The Non-Attendance screen is also in the Retention Management screen. It will show members who have not attended for the number of days specified.

E.g. In this example, at 30 days non attendance a phone is the action required.

Non-Attendance

30 days (708) 90 days (632) 180 days (5098)

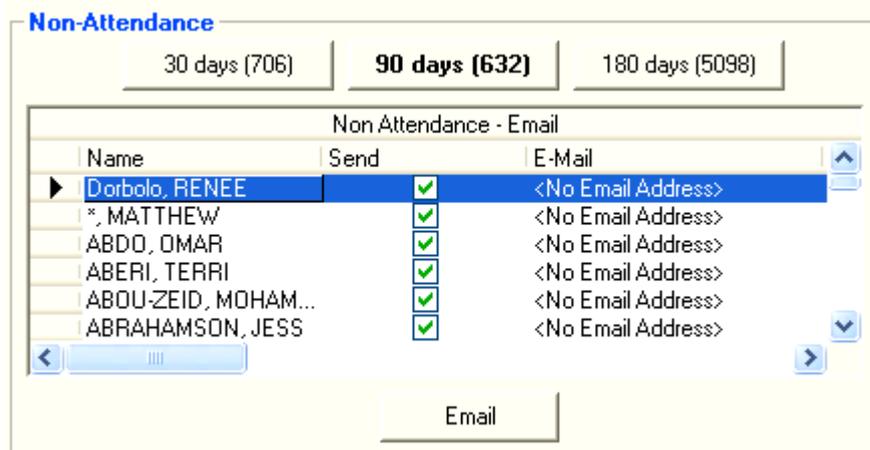
Non Attendance - Phone Call			
Name	Complete	Home Phone	Last Visit
ABDULLAH, ABDULL...	<input type="checkbox"/>	0425842600	08/08/20
ABDULLAHI-MOHAM...	<input type="checkbox"/>	0434447068	25/08/20
ABDULLAHI-MOHAM...	<input type="checkbox"/>	<No Phone Numb...	14/08/20
AGGETT, CHRISTOP...	<input type="checkbox"/>	98963023	25/07/20
AHAMED AL KUWAI...	<input type="checkbox"/>	0450451690	22/08/20
AHMED, AHMED	<input type="checkbox"/>	0424630996	01/09/20
AITKEN, HEATHER	<input type="checkbox"/>	93984815	28/07/20
AL-BOUTHABET, ALI	<input type="checkbox"/>	0422 610 726	07/08/20

Once a person has been contacted by the action required, by clicking the complete box next to their name their name will disappear off the list.

Bulk E-Mails, SMS and Letters

If an email, SMS or letter is set for any of the non attendance, these options can be actioned in bulk.

E.g. In this example, at 90 days non attendance an email is the action required. By selecting the whole list everyone in the list who has an email will receive an email.

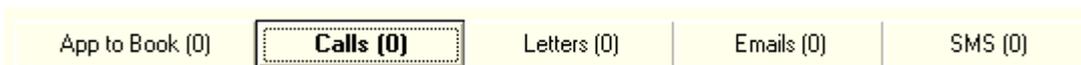


Name	Send	E-Mail
Dorbolo, RENEE	✓	<No Email Address>
* MATTHEW	✓	<No Email Address>
ABDO, OMAR	✓	<No Email Address>
ABERI, TERRI	✓	<No Email Address>
ABOU-ZEID, MOHAM...	✓	<No Email Address>
ABRAHAMSON, JESS	✓	<No Email Address>

Viewing Customer Records

In the retention management screen if you would like to view a customer's record you can right click on the customer's name and select 'Show marketing details' which will take you to their profile.

Appointments to book, Calls to make, Letters, Emails and SMS's to send



These tabs appear across the top of the management screen. By selecting a tab any appointments, calls, letters, emails or SMS's that need to be actioned will show up in the screen. By viewing the due date next to the name, you will see when the action is due.

Current and Missed Appointments

By selecting either:



It will either show missed appointments or that day's appointments.

To rebook a missed appointment, right click on the person's name, view the customer's appointment details, from there go into the appointment screen and drag the person's appointment into an available timeslot. Missed appointments can only be moved within the week displayed. Doing this changes the appointment status to pending again. In the booking is a facility booking then you can change the details in the booking screen.

Reporting on your Programs

Reporting > Retention

Sales Report

This report will show you the amount of sales a staff member has made.

Step Analysis Report

Allows you to gather raw data on where people are at with their steps.

Average Time as a Member

This report prints a list of current memberships, showing the length of time for each membership. If the membership has been renewed within the 'Days between memberships' then those days are included in the length of time. This report also shows the average length of time for memberships shown by membership types.

In the selection criteria enter the date that you would like the report to run up to, i.e. it will show members who started before this date.

By selecting Show summary only the report will be refined to only show the membership type and numbers.

You can choose how many days between memberships you would like to include in the report.

Selection Criteria

Show Members who started before: D

Days between Memberships: 0

Show Summary only

By selecting the Category and Type as shown below, you determine what memberships the report will include.

Select Membership Type(s)

Perpetual\Term
 All
 Perpetual only
 Term Only

Category:

- DD
- TM

Type:

Code	Description	Pay Typ
<input checked="" type="checkbox"/> 12GOLF	12 Month ALGC and BAYFIT Membership	UT
<input checked="" type="checkbox"/> 15DAYM...	15 Day Trial Membership	UT
<input checked="" type="checkbox"/> 28TRAIL	28 Day Trial	UT
<input checked="" type="checkbox"/> 3MONT...	Buy Three Months Get Three for Free	UTPP
<input checked="" type="checkbox"/> AQA03	aqua aerobics 3 month pass	UT

Select All Select All

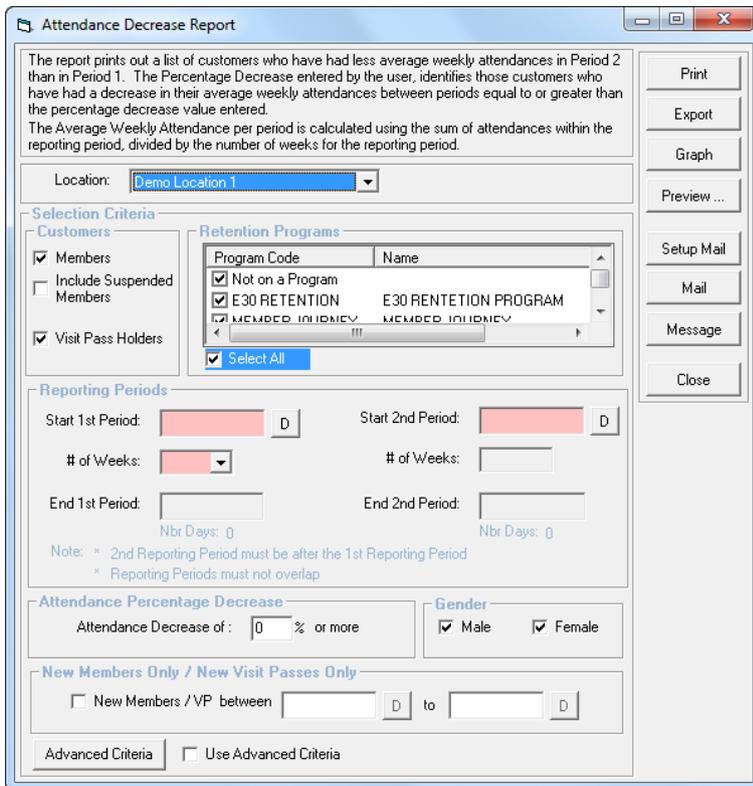
Average Time of Cancelled Members

This report prints a list of cancelled memberships, showing the length of time for each membership. Once again, if the membership has been renewed within the “Days between memberships” then those days are included in the length of time. The report shows the average length of time for memberships shown by membership types.

For information on how to run this report please see Average time as a Member.

Attendance Decrease Report

This report shows members who have had a decrease percentage from one period or another. Used for showing people that are likely to become Non attendees so you can target them before they stop coming to the centre.



The screenshot shows the 'Attendance Decrease Report' window. It includes a title bar, a main content area with instructions and filters, and a right-hand sidebar with action buttons.

Instructions:
 The report prints out a list of customers who have had less average weekly attendances in Period 2 than in Period 1. The Percentage Decrease entered by the user, identifies those customers who have had a decrease in their average weekly attendances between periods equal to or greater than the percentage decrease value entered.
 The Average Weekly Attendance per period is calculated using the sum of attendances within the reporting period, divided by the number of weeks for the reporting period.

Location: Demo Location 1

Selection Criteria

Customers

- Members
- Include Suspended Members
- Visit Pass Holders

Retention Programs

Program Code	Name
<input checked="" type="checkbox"/>	Not on a Program
<input checked="" type="checkbox"/>	E30 RETENTION E30 RETENTION PROGRAM
<input checked="" type="checkbox"/>	MEMBER ID IDNEY MEMBER ID IDNEY

Select All

Reporting Periods

Start 1st Period: [] D Start 2nd Period: [] D
 # of Weeks: [] # of Weeks: []
 End 1st Period: [] Nbr Days: 0 End 2nd Period: [] Nbr Days: 0

Note:
 * 2nd Reporting Period must be after the 1st Reporting Period
 * Reporting Periods must not overlap

Attendance Percentage Decrease
 Attendance Decrease of : [0] % or more

Gender
 Male Female

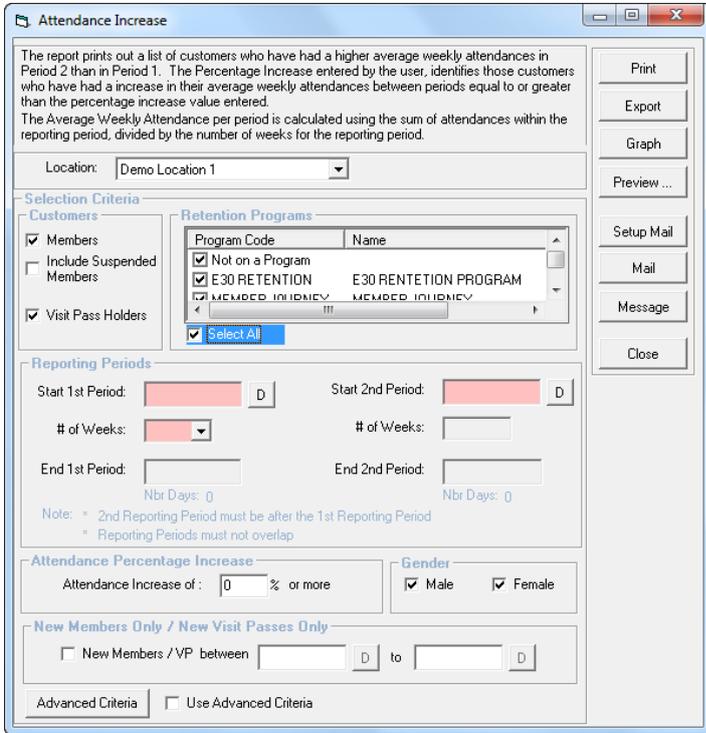
New Members Only / New Visit Passes Only
 New Members / VP between [] D to [] D

Advanced Criteria Use Advanced Criteria

Right-hand sidebar buttons: Print, Export, Graph, Preview..., Setup Mail, Mail, Message, Close

Attendance Increase Report

This report shows members who have had an increase percentage from one period to another. This is just the reverse of the attendance decrease so you can see if you target people whose attendance is dropping off, then how effective your work is.



The report prints out a list of customers who have had a higher average weekly attendances in Period 2 than in Period 1. The Percentage Increase entered by the user, identifies those customers who have had an increase in their average weekly attendances between periods equal to or greater than the percentage increase value entered.

The Average Weekly Attendance per period is calculated using the sum of attendances within the reporting period, divided by the number of weeks for the reporting period.

Location: Demo Location 1

Selection Criteria

Customers

- Members
- Include Suspended Members
- Visit Pass Holders

Retention Programs

Program Code	Name
<input checked="" type="checkbox"/> Not on a Program	
<input checked="" type="checkbox"/> E30 RETENTION	E30 RETENTION PROGRAM
<input checked="" type="checkbox"/> MEMBED INIDNEY	MEMBED INIDNEY

Select All

Reporting Periods

Start 1st Period: [] D Start 2nd Period: [] D

of Weeks: [] # of Weeks: []

End 1st Period: [] End 2nd Period: []

Nbr Days: 0 Nbr Days: 0

Note:

- * 2nd Reporting Period must be after the 1st Reporting Period
- * Reporting Periods must not overlap

Attendance Percentage Increase

Attendance Increase of: [0] % or more

Gender

- Male
- Female

New Members Only / New Visit Passes Only

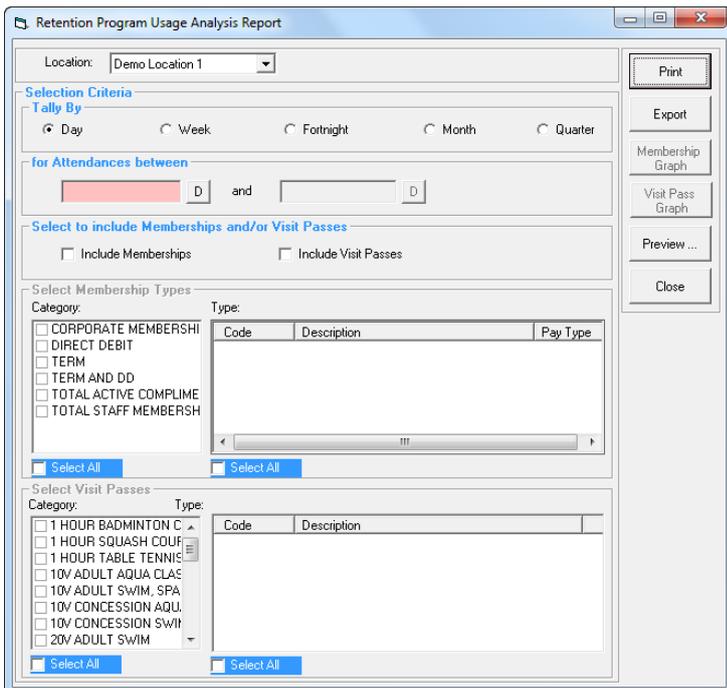
New Members / VP between [] D to [] D

Advanced Criteria Use Advanced Criteria

Buttons: Print, Export, Graph, Preview..., Setup Mail, Mail, Message, Close

Program Usage Analysis Report

This report looks at attendance of members and VP holders who are on a program so you can track the increase in attendance you are getting from people that are on a program.



Retention Program Usage Analysis Report

Location: Demo Location 1

Selection Criteria

Tally By

Day Week Fortnight Month Quarter

for Attendances between

[] D and [] D

Select to include Memberships and/or Visit Passes

- Include Memberships
- Include Visit Passes

Select Membership Types

Category:

- CORPORATE MEMBERSHI
- DIRECT DEBIT
- TERM
- TERM AND DD
- TOTAL ACTIVE COMPLI
- TOTAL STAFF MEMBERSH

Type:

Code	Description	Pay Type
------	-------------	----------

Select All Select All

Select Visit Passes

Category:

- 1 HOUR BADMINTON C
- 1 HOUR SQUASH COUF
- 1 HOUR TABLE TENNIS
- 10V ADULT AQUA CLAE
- 10V ADULT SWIM, SPA
- 10V CONCESSION AQU
- 10V CONCESSION SWIT
- 20V ADULT SWIM

Type:

Code	Description
------	-------------

Select All Select All

Buttons: Print, Export, Membership Graph, Visit Pass Graph, Preview..., Close

No Sale Return Report

This report shows the number of customers who did not purchase a membership within the timeframe set by the business operator which is calculated from the end of a tour appointment or the first appointment in a prospect program but do return to purchase a membership. The report also shows the number of customers that purchased a membership within the set timeframe.



Retention No Sale Return Report

Selection Criteria

NSR TimeFrame Retention Setting

The 'No Sale Return Timeframe' is the time in minutes from completion of the first appointment within a Prospect Program to selling a Membership.

No Sale Return Timeframe: Hrs: Mins:

Date Range for when Appointment Step was completed

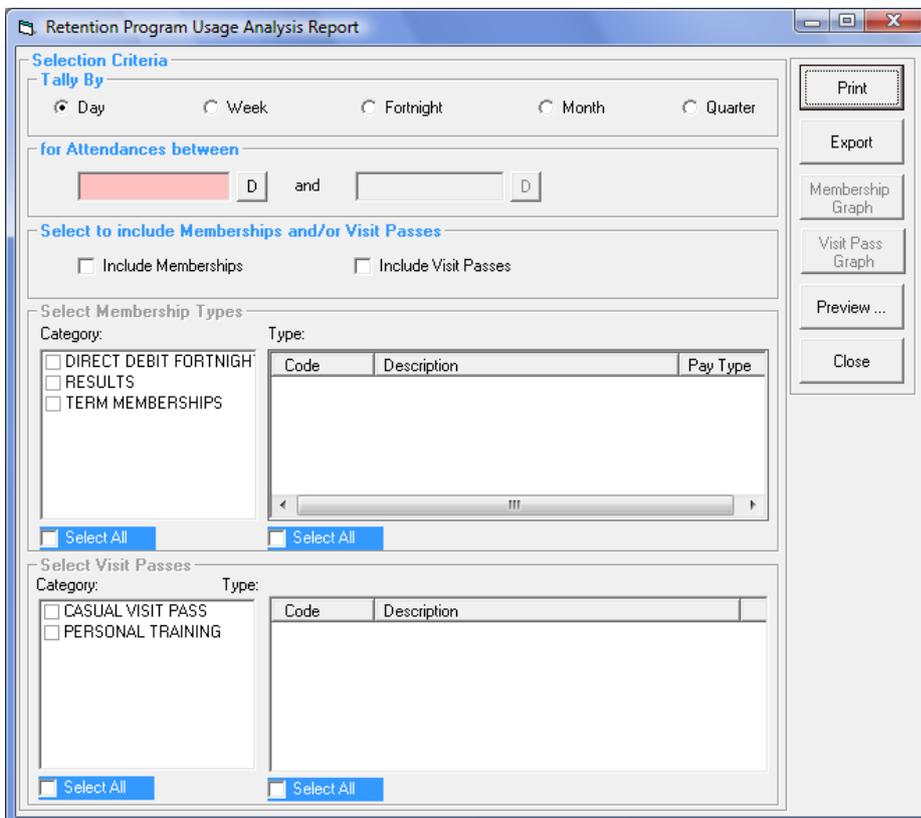
From Date: D To Date: D

Print
Export
Graph
Preview ...
Close

Program Usage Analysis

This report shows by numbers of attendances in a specified date range which is displayed either in a daily, weekly, fortnightly tally etc, members attending the centre who are on retention program and which program that is and attendances for those members who are not on a retention program.

Note this is for memberships and visit passes only.



Retention Program Usage Analysis Report

Selection Criteria

Tally By

Day Week Fortnight Month Quarter

for Attendances between

D and D

Select to include Memberships and/or Visit Passes

Include Memberships Include Visit Passes

Select Membership Types

Category:

DIRECT DEBIT FORTNIGHT
 RESULTS
 TERM MEMBERSHIPS

Type:

Code	Description	Pay Type

Select All Select All

Select Visit Passes

Category:

CASUAL VISIT PASS
 PERSONAL TRAINING

Type:

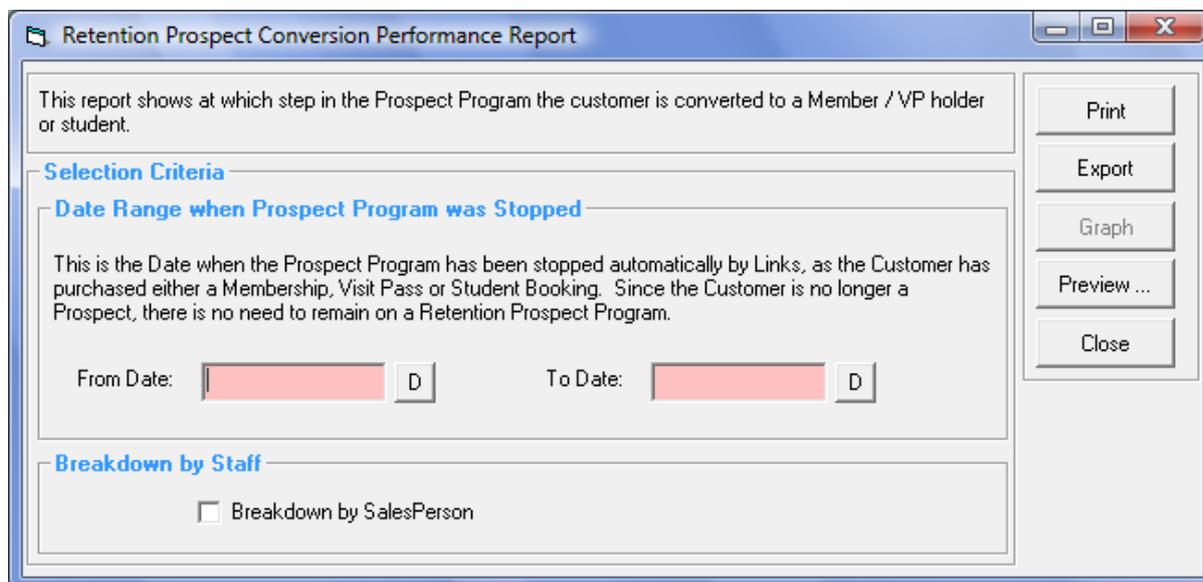
Code	Description

Select All Select All

Print
Export
Membership Graph
Visit Pass Graph
Preview ...
Close

Retention Prospect Conversion Performance

The step as part of a prospect program at which a prospect is converted to a member, visit pass holder or booked into a class is shown in this report. Prospect programs can then be reviewed for effectiveness and sales staff performance can also be reviewed as you have the option to breakdown by sales staff.



Retention Prospect Conversion Performance Report

This report shows at which step in the Prospect Program the customer is converted to a Member / VP holder or student.

Selection Criteria

Date Range when Prospect Program was Stopped

This is the Date when the Prospect Program has been stopped automatically by Links, as the Customer has purchased either a Membership, Visit Pass or Student Booking. Since the Customer is no longer a Prospect, there is no need to remain on a Retention Prospect Program.

From Date: D To Date: D

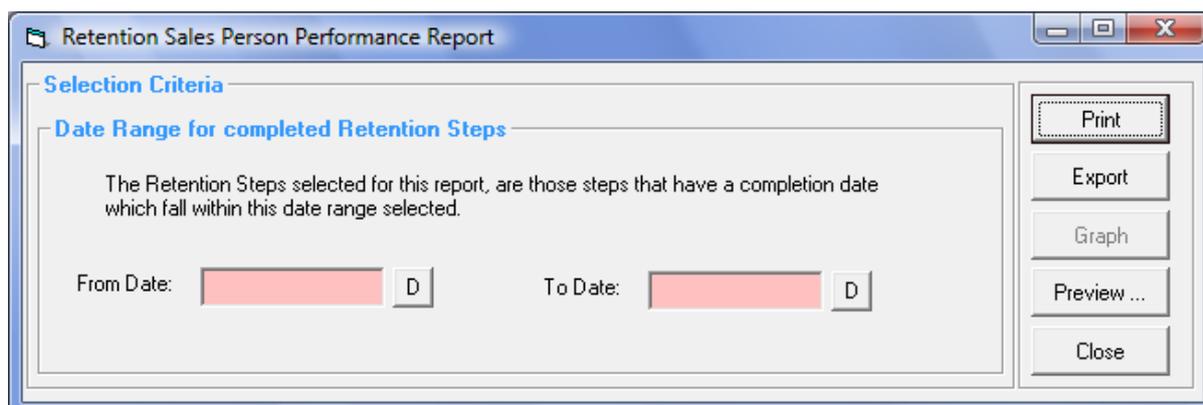
Breakdown by Staff

Breakdown by SalesPerson

Print
Export
Graph
Preview ...
Close

Sales Person Performance Report

This report will show which steps were completed by each staff member as a tally for the date range entered. The steps are reported on by action type and therefore the tally is categorised by how many phone calls, appointments booked etc each staff member has completed. Therefore overall staff performance can be measured and individual staff members that are performing well can be given recognition.



Retention Sales Person Performance Report

Selection Criteria

Date Range for completed Retention Steps

The Retention Steps selected for this report, are those steps that have a completion date which fall within this date range selected.

From Date: D To Date: D

Print
Export
Graph
Preview ...
Close

Glossary

Appointments

- Fitness Consultations
- An appointment where a member's health and fitness is assessed and recorded by a Gym Instructor
- Program Show
- An appointment where a member is shown through their personalised gym program

Retention

- Retention is simply the act of retaining something; using this retention program the aim is to retain as many members as possible

Prospect

- A prospect is a potential member

Sales Appointments

- A prospect attends an appointment at the centre at which they will be toured through the centre and explained member prices and details

Sales Managers & Sales Staff Members

- In staff set up if a person is checked under Sales Manager they have full access to the retention program. To have access to the Management Screen you must have Sales selected under Staff Members, Roles. In order a Sales Staff member to be assigned to steps of a member's program they must have Sales selected also.