

# SALES & RETENTION HANDBOOK

USING TECHNOLOGY TO WORK  
SMARTER AT YOUR GYM OR  
HEALTH CLUB

ClubOS

# Using Technology to Work Smarter at Your Fitness Business

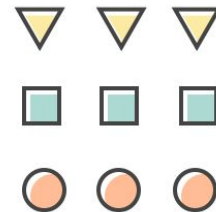
The lifeblood of any club is its membership. Maintaining a robust and engaged member base keeps a fitness business viable long term. Clubs simultaneously must have effective pathways for nurturing leads into sales-ready prospects and a mapped out engagement plan to keep members invested in their services. It's a lot of work for a full team, much less a single-owner operation, to keep track of and execute effectively in between daily gym duties.

That's where a CRM or Customer Relationship Management software comes into play. The right CRM will organize, unify, and simplify the sales and retention process.



**Organize:** Input and track sales goals; map out prospect-member lifecycle.

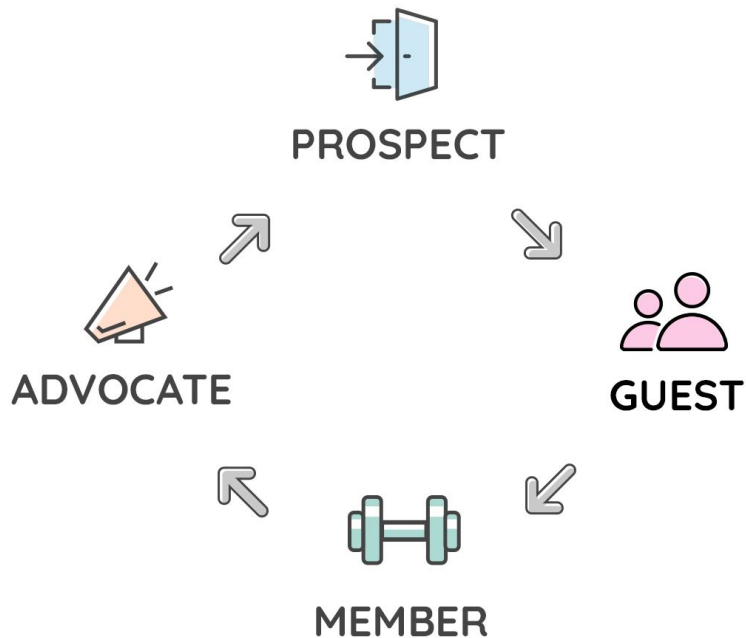
**Unify:** One sales tool to replace redundant workflows and softwares.



**Simplify:** Automate touchpoints, eliminate manual data entry, and utilize automatic follow-up schedules.

# Prospect-Member Lifecycle

There are four major stages in the prospect-member lifecycle. The first is when a new lead is identified and becomes an official prospect. The second is when a prospect accepts a guest pass or trial to the gym. The third is when a prospect purchases a membership and becomes a member. The fourth is when the member, having experienced the value of the club's services, becomes an advocate for the gym and generates new referrals. These referrals in turn enter stage one as new prospects and the cycle is repeated.



A club's software should be utilized at each step to maximize the sales and retention opportunities.

# Stage One: Prospect

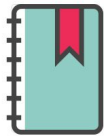
The prospect-member lifecycle begins each time a new prospect is identified. However, not all prospect are created identically. New leads are typically generated through one of three major pipelines.

**Walk-Ins:** A prospect whose first contact with the club is physically walking into the location and inquiring about rates and services.

**Telephone Inquiries:** A prospect whose first contact with the club is via a phone call to inquiry about rates and services.

**Web Leads:** A prospect whose first contact with the club is via an online medium, e.g. club website, social media accounts, or third party partner softwares.

## Without a CRM

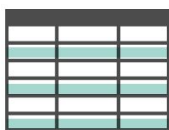
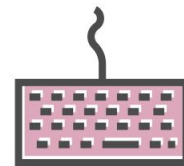


### Paper-Oriented Lead Capture

Prospect information is recorded in paper guest registries, notebooks, scrap paper, or sticky notes.

### Redundant Data Entry

Prospect information is manually re-entered from paper forms to master lead lists or prospect spreadsheets.



### Manual Reach Outs

Club staff work through spreadsheets of prospects or handwritten lists to perform follow-ups.

## With a CRM



### Digital Guest Waiver

Walk-in prospects enter their information using the club tablet(s) into the digital guest waiver.



### New Lead Form

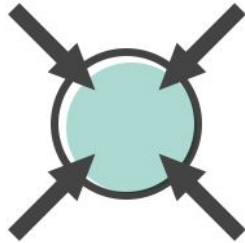
Prospects who inquire via telephone have their information entered directly into the software using the new lead form.



### Web Leads

Prospects captured online through the club website, social media, or partner software are automatically funnelled into the software.

# The Difference



## Unified Collection Point

Prospects generated through multiple entry points are collected into one central location, the club's CRM. Staff can review and contact any leads quickly through the software as opposed to juggling three or more prospect lists.



## Reduced Data Entry

Capturing lead information on paper requires redundant data entry as it must be transferred to prospect spreadsheets or master lists versus one-time entry into a CRM. Further, prospect profiles are created automatically and convert seamlessly to member profiles when the sale is finalized in the software.



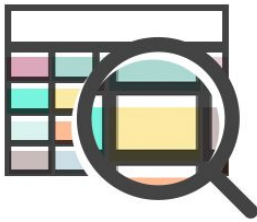
## Automated Touchpoints

Web leads receive automatic email responses when they request more information for a club online. Automated responses reduce the wait time between inquiry and first contact. Club staff follow automated messages with personal reach outs to schedule appointments.

## Stage 2: Guest

While some prospects contact a gym fully intending to purchase a membership, most need time to evaluate if its facilities and services are right for their fitness goals and lifestyle. This is where guest passes, also known as trial memberships, come into play. A trial period gives potential new members a chance to explore a club without the pressure of a sales appointment. Likewise, this time is invaluable to club staff as a chance to engage and incentivize a purchase.

### Without a CRM

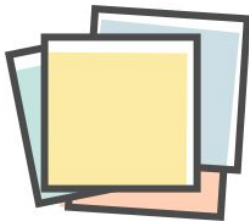
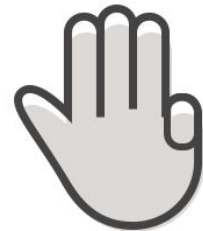


#### Manual Tracking

Staff log guest pass start and end dates on a shared calendar or sticky notes in order to track upcoming trial expirations.

#### Hand Counted Numbers

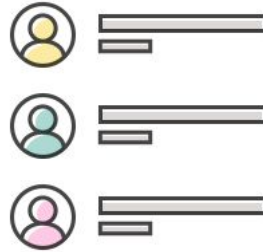
Staff hand count guest pass records to verify current numbers of trial members.



#### Non-Automatic Data Transfers

Staff rely on handwritten notes from the sales appointment to assess a guest's needs and wants in a gym membership.

## With a CRM



### Usage Tracking

Each guest check-in is logged in the system for later reference and for all staff to access.



### Guest Pass Expiration Notification

The system alerts staff to expiring guest passes and prompts reach outs to discuss membership options.



### Ongoing Follow-ups

If a guest does not purchase a membership by the end of their trial period, they are placed within a missed opportunity follow-up schedule.



# The Difference



## Data Driven

Notes recorded during a guest's original sales appointment are stored on their profile and easily accessed. Staff use check-in records to confirm a guest has visited the club and inquire if their experience met their needs as recorded during the sales appointment.



## Long Term Strategy

Guest prospects are placed into the club's follow-up schedule for reach outs during their trial and beyond. Staff periodically follow-up with guests who opted not to purchase a membership to offer promotional rates or discuss new club services. This prevents expired guests from being lost in the shuffle as new guests visit the club and increases the likelihood of eventually landing the sale.



## Expiration Alerts

Staff are alerted to guest passes expiring 24 hours before, so they can reach out and schedule an appointment to discuss membership options. This empowers staff to proactively convert guests rather than relying on the prospect to contact them.

## Stage 3: Member

Once a prospect purchases a membership, successful gyms focus on two main objectives with new members: retention and engagement. Here, retention refers in a general sense to basic administrative tasks, such as tracking inactivity, delinquencies, and pending expirations. Engagement refers to ways clubs deepen their relationship with members, such as offering additional services (classes or PT), hosting club-wide events, or providing enrichment amenities (free assessments). The more engaged a member becomes, the higher their probable retention level grows.

### Without a CRM

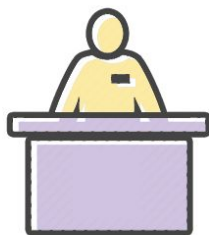


#### Manual Audits

Member inactivity, delinquencies, and pending expirations require rigorous manual tracking by club staff.

#### In-Club Signage

Club events and new services are advertised using in-club signs posted to gym walls and community boards.



#### Front Desk

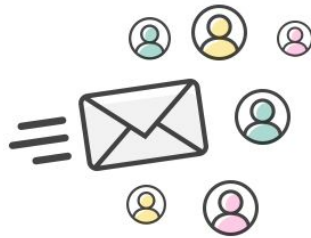
Front desk staff inform members of upcoming events and services as well as update them on membership delinquencies or pending expirations.

## With a CRM



### Payment Monitoring

Members who are past due on monthly payments are flagged in the system, which initiates a reach out by assigned staff and/or an automated email alerting the member to the delinquency.



### Enhanced Communication

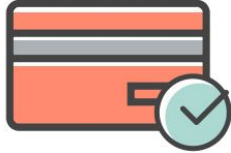
Staff are able to email and text members through the software as well as log completed phone calls for later reference. Blast emails enable mass communication with membership while automated emails keep members up-to-date on important changes in their accounts.



### Inactivity Alerts

Members who surpass the club's inactivity threshold, preset number of days without a check-in, are flagged in the system, which initiates a reach out by assigned staff and/or an automated email encouraging the member to visit the club.

# The Difference



## Fewer Outstanding Payments

Delinquent invoices are flagged and stored for easy reference to prevent a swell in outstanding debt. Staff follow regular scheduled reach outs to delinquent members until payment is received.



## More Informed Membership

While in-club signs and front desk staff can make a big dent in informing members of club events or discrepancies on their account, their influence cannot extend beyond the club's front door. CRM software empowers club staff to contact members through a variety of methods and at the most important times.



## Increased Member Accountability

By tracking inactivity, clubs are able to provide higher accountability to members. Personalized or automated messages that encourage inactive members to visit the club boost attendance and retention rates.

## Stage Four: Advocate

When a member is fully engaged in a gym, its services, and its culture they become advocates. Member advocates speak positively about their club experience and refer family and friends as new leads. Successful clubs incentivize advocacy through referral bonuses and make referral entry as accessible and smooth as possible.

### Without a CRM



#### Paper-Oriented Referral Capture

Staff record referral information on paper forms, notebooks, scrap paper, or sticky notes.

#### Manual Follow-Ups

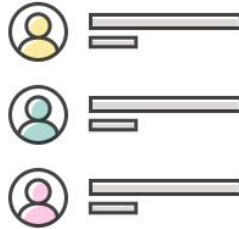
Club staff work through a referral spreadsheet or list to perform reach outs.



#### Referring Member Follow-Up

After a successful referral, responsible staff verify the referring member and reach out to discuss their referral bonus.

## With a CRM



### Quick Referral Entry

Staff are able to enter referrals through multiple portals within the software, which reduces unnecessary navigation.



### Linked Accounts

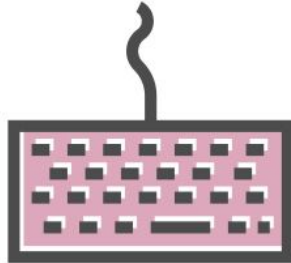
The referring member's profile is linked to the referral to establish a digital papertrail for later reference.



### Automated Email Response

Referring member receives an automated email notifying them of a successful referral.

# The Difference



## Reduced Data Entry

Referral information captured on paper leads to redundant data entry as it must be transferred to prospect spreadsheets or master lists versus one-time entry in a CRM. Further, the software uses this information to automatically create a referral prospect profile.



## Automated Touchpoints

Referrals are placed within the club's follow-up schedule. Staff use this schedule to make regular reach outs until an appointment is scheduled with the referral.



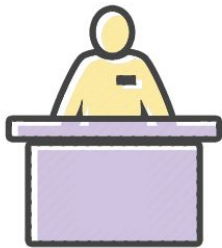
## Enhanced Notification

Automated email notifications sent to referring members outline their earned referral bonus, such as a free month of membership, and how to claim it. Ensuring referring members are rewarded incentivizes future referrals.

# Bonus: Personal Training Lifecycle

When a new member joins a club, they become eligible to take advantage of its training services. This initiates the PT prospect-member lifecycle, which is focused on the same two goals as the prospect-member lifecycle: sales and retention. Club sales are boosted through personal and group training services while a member's probable retention level increases with each new service they purchase.

## Without a CRM



### Orientation

New members are offered an orientation with a club trainer. This is a free fitness consultation in which the trainer suggests club programs that can help them meet their fitness goals.

### Manual Billing

PT clients pay each invoice manually in the club when they arrive for training.

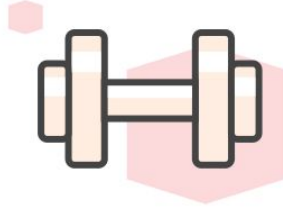


### Package Auditing

Trainers manually audit client packages to track remaining sessions and ensure generated invoices have been paid.



## With a CRM



### PT Status

Prospects are assigned PT statuses which indicate how far along they are in the PT prospect-member lifecycle.



### Automated Payments

Recurring training invoices automatically bill using client credit card or bank account information.



### Opportunity Alerts

PT clients whose training packages dip below the club's opportunity threshold, a preset amount of remaining training sessions, are flagged in the system which initiates a reach out by assigned staff to discuss package renewal options.

# The Difference



## Targeted Follow-Ups

Prospects are assigned PT statuses based on how far along they are in the PT prospect-member lifecycle. Staff utilize status information to focus reach outs on progressing prospects to the next step.



## Reduced Past Due Invoices

Automated payments eliminate the need to manually process invoices in club. This ensures payments are taken on time, reduces staff bookkeeping, and allows clients to start training immediately upon arrival.



## Increased Renewals

Opportunity alerts enable trainers to begin renewal conversations before a client exhausts all available training sessions. This gives clients time to prepare financially for the upcoming purchase and prevents unnecessary lapses in training.

# Overview

Making changes to how you sell and retain members doesn't have to be hard, scary, or feel like the great unknown. Everything you need to know is right here. We hope that you take the information in this e-book and find ways that your fitness business could increase revenue and retention. To get started on the right foot, we recommend Club OS. Interested in learning more?

The screenshot displays the Club OS CRM interface for a customer named Jenn White. The interface is divided into several sections:

- Header:** "Free Workout Booked #2: Jenn White" with a close button (X).
- Navigation:** A sidebar on the left with icons for Home, Call, Email, Text, and Other.
- Contact Info:** A form with fields for First Name (Jenn), Last Name (White), Email (jenn.white9@gmail.com), Mobile ((555) 678-7654), Home ((555) 123-4321), and Work.
- Follow-Up Info:** A section with fields for Created (8/14/17 at 4:16 PM), Fitness Consultation Date (8/25/17 at 3:00 PM), Origin (Walk-in), Marketing Source (Facebook), Referred By (Brian Connor), Interests (Membership), Location (Main Street), and Age (27).
- Email Campaigns:** A table showing a campaign titled "Free Workout Reminder" sent on "Sept 2, 2017 @ 9:35 AM".
- Message History:** A list of messages on the right side, including one from Karen K. on 9/8/17 and another from Roger R. on 8/24/17.
- Follow-Ups List:** A list of other customers with their status and dates: Jenn White (Drop-In 9/6/17), Jeff Brown (Low-Usage 9/6/17), Brian Green (Web Lead 9/6/17), Michelle Black (Free Workout Booked 9/6/17), and Sarah Smith (Customer 9/6/17). Each entry has a "FOLLOW-UP" button.

## Contact Us:

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