# PT Management Webinar

## Client Guide

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## Goal

The goal of the webinar is to demonstrate the use of Club OS on a daily basis as a trainer/coach.

## Outline:

### 1. Login

1.1. Log into anytime.club-os.com . Click here to learn more about browsers that are currently supported.

1.2. If you have issues logging in click on forgot password. Click here to learn more

### 2. Setting Availability

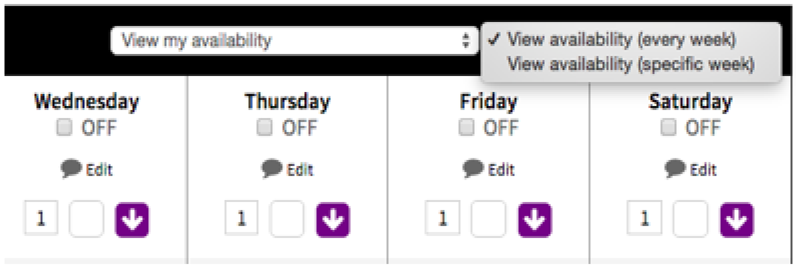
As a trainer, setting availability is very important. It indicates to staff members (H2i) the time slots that are available for scheduling fitness consultations for any given trainer. It also helps in ensuring that trainers are booking appointments only in time slots that they are available at.

#### 2.1. Step 1

To set availability, navigate to ‘My schedule’ and then select ‘Availability’.

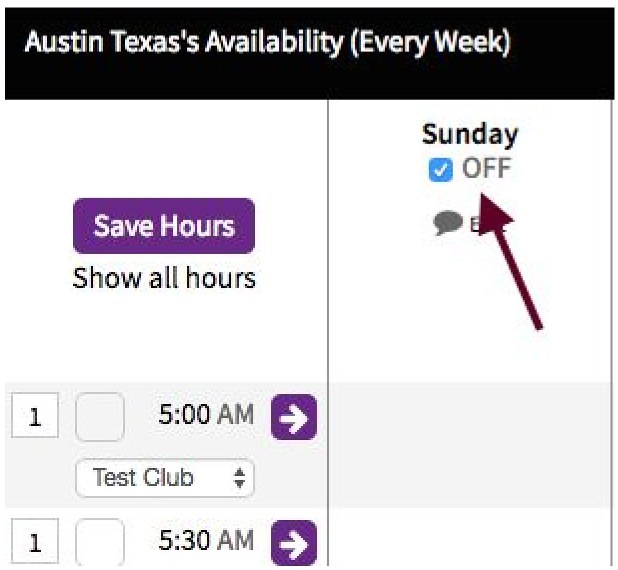

#### 2.2. Step 2

Choose the period of time for which you are setting availability. The system provides you with two options for setting availability. You could set it for a specific week or for every week.




### 2.3. Step 3

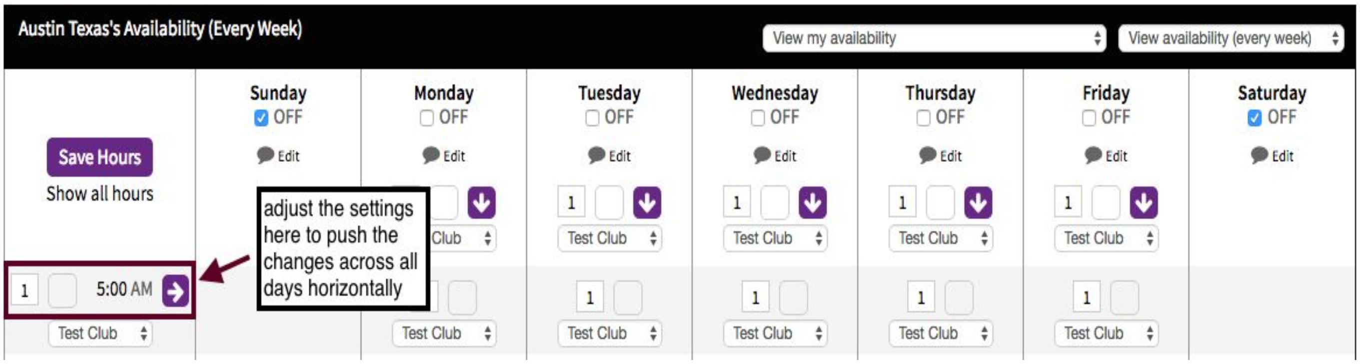
Next, mark the day as off if you will be unavailable on that day. This will ensure that appointments are not booked on that day. It will also prevent follow-ups being populated on that day.



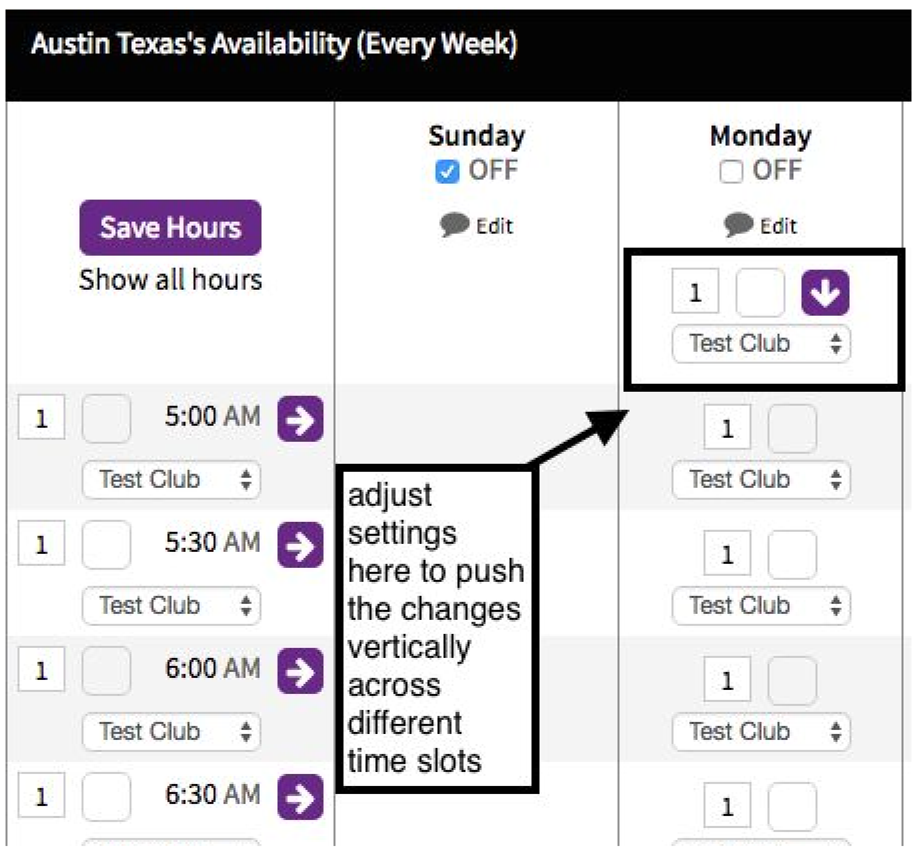

### 2.4. Step 4

Set the availability horizontally or vertically

- Horizontally: It can be set horizontally across multiple days for a particular time slot (eg- 5:00 AM)

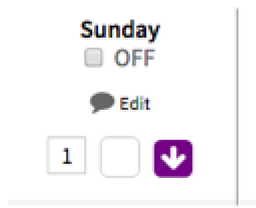



- Vertically: It can also be set vertically for the same day (over multiple time periods).

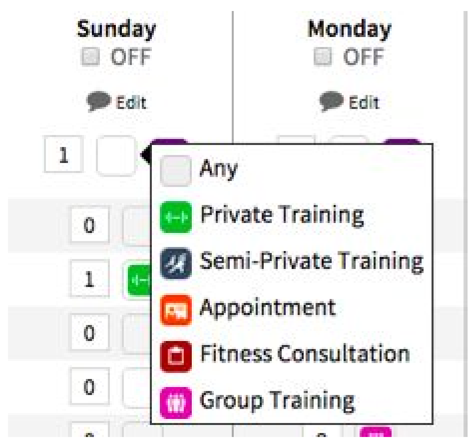


a) The first field is for setting the number of appointments you are available for in a given time slot.   As trainers, it is advisable to choose '1'  to avoid being double booked.

0= unavailable
1= available
2= double booked



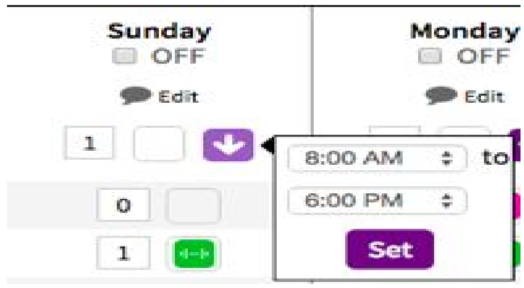

b)The next step is to select the type of event. Clicking on the second box will display a number of options to choose from as shown in the picture below.



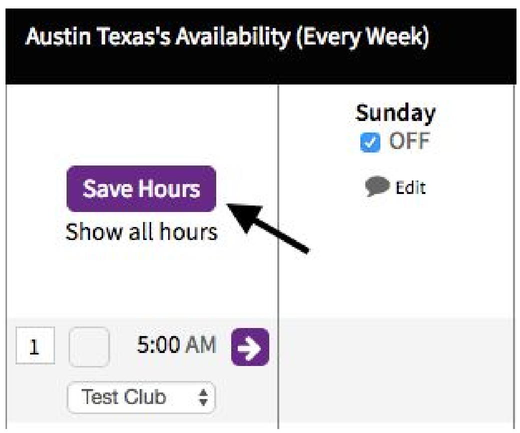

**Note:**

- Appointment icon (orange) is reserved primarily for an H2i. It is used to indicate a club tour. Most trainers will not use this icon.
- Selecting 'Any' will let you select any type of appointment when scheduling the event. This should be selected if you don't have a preference for the type of appointment.

c)Next, select the time duration for your availability. Clicking on the arrow will display the time setting window. This can be adjusted according to your availability.



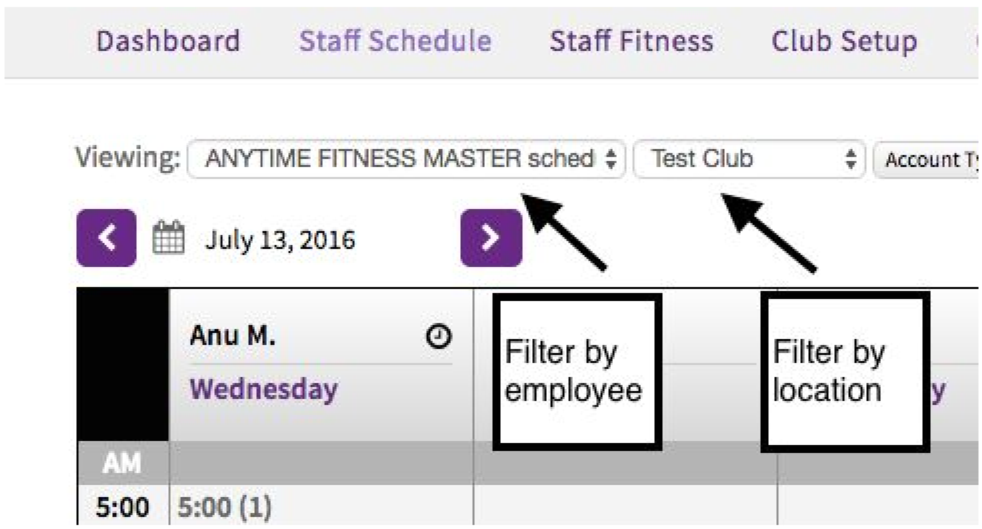

d) Remember to save your changes.



## 3. Fitness Consultation (FC)

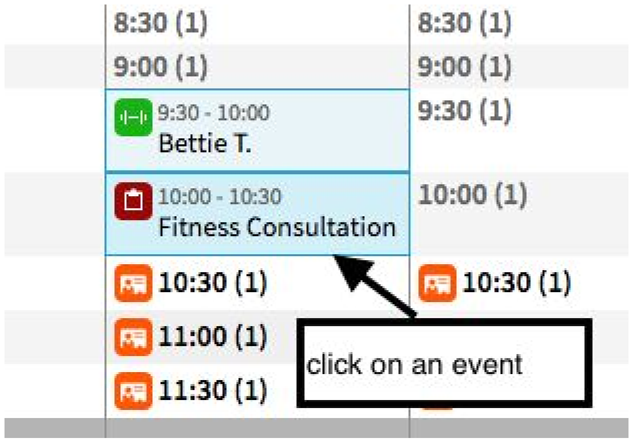
### 3.1. Scheduling Fitness Consultation

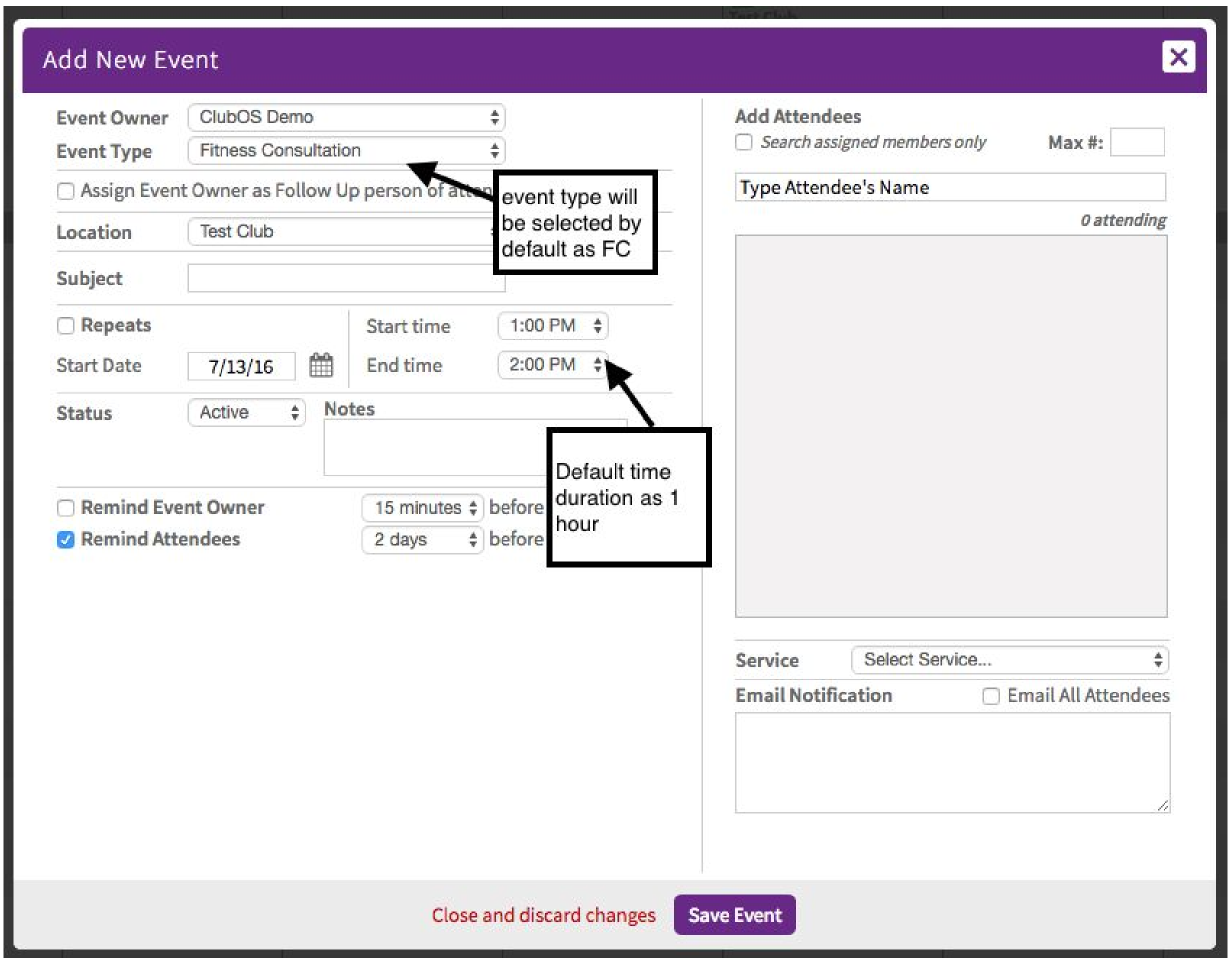
To schedule an FC, first navigate to the calendar ( *My Schedule → Calendar)*. There are two views available for this screen (My schedule and Master schedule). Select the 'My schedule' view to look at your individual calendar. If you are an multi-location owner, utilize the filters as needed to filter by location and employee (if needed).




A Fitness consultations (FC) session can be scheduled in two different ways:

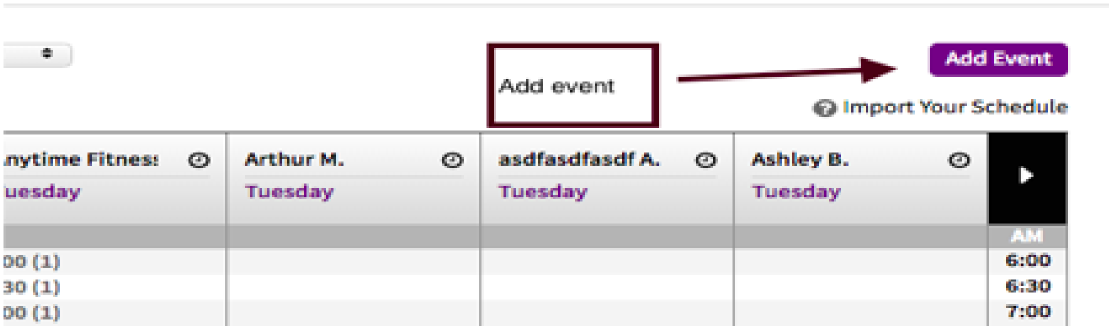
a) First Method: Click on an open FC event indicated by the red clipboard icon. The event pop-up window will load with the default values (event type as FC and time as 1 hour). These values can be adjusted if needed.



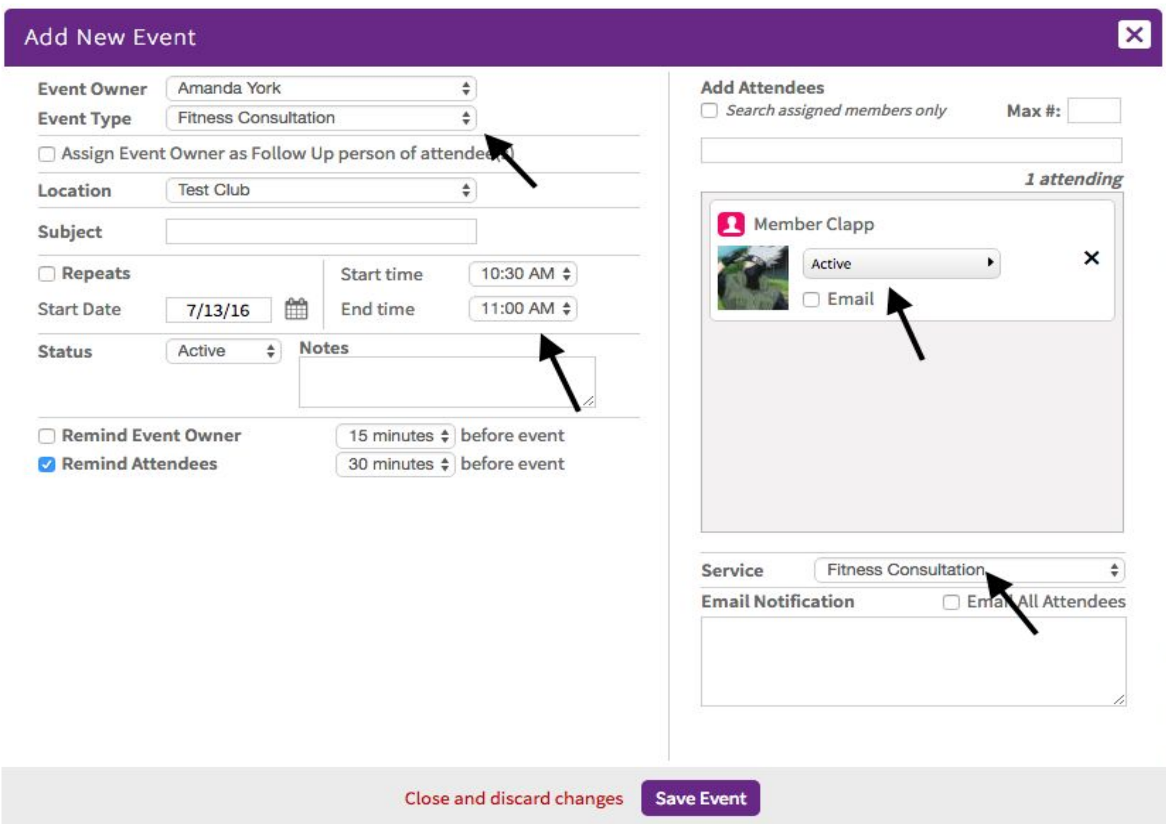




b) <u>Second Method:</u>

After accessing the calendar, click on ‘Add Event’. This will bring up a pop-up window where you can fill out information as needed.

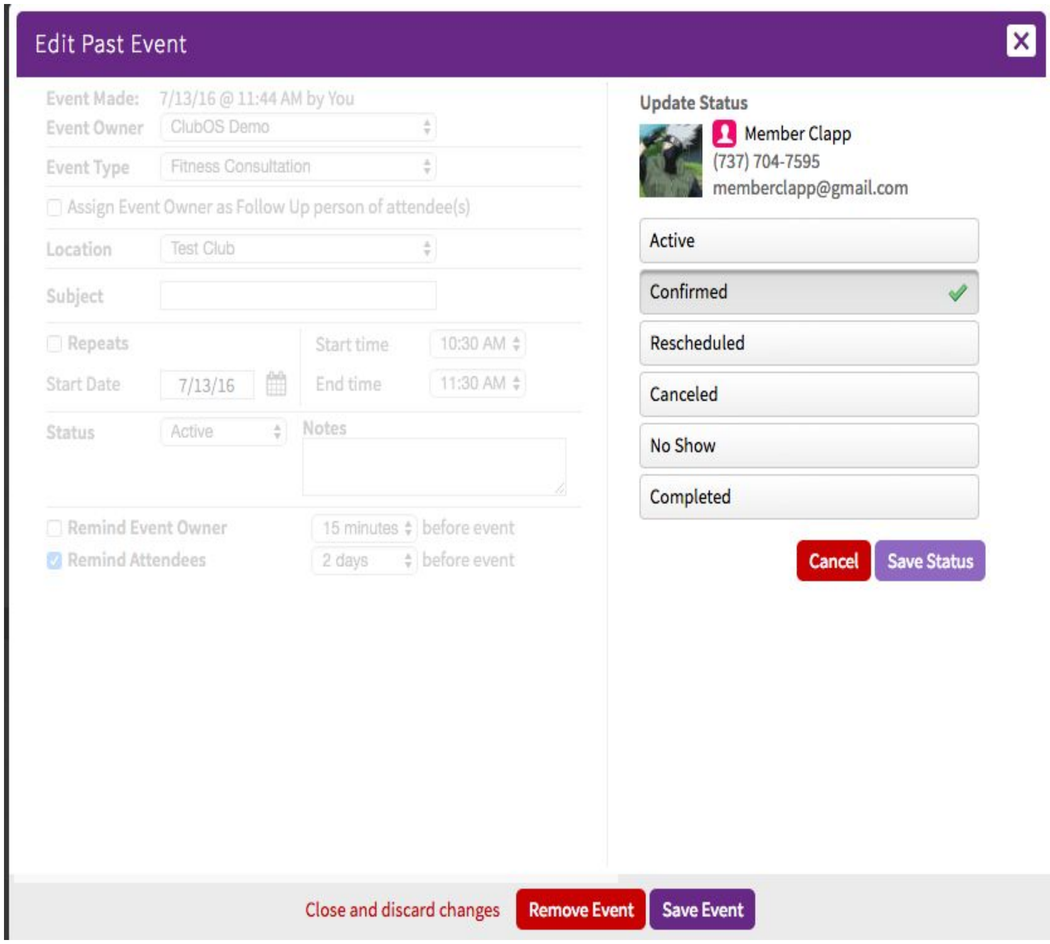



- <u>Event type:</u> Select 'Fitness consultation' to schedule an FC session.
- <u>Start Time/End time:</u> Adjust this as needed
- <u>Add Attendees:</u> Always remember to add the attendee
- <u>Service:</u> Select the fitness consultation service from the drop down menu. If your particular location pays trainers for fitness consultation, then this step is very important. It will ensure that your trainer gets paid for the fitness consultation session.
- <u>Remind Event Owner:</u> Select this if you would like to be reminded about the event.
- <u>Remind Attendees:</u>Select this option if you would like to remind your attendees about the event.




### 3.2. Marking an FC as confirmed

It is recommended to mark an FC as confirmed after confirming the appointment by calling/emailing the client. To mark the event as confirmed, click on the drop down menu and select 'confirmed'. This will mark the event as 'confirmed' on the calendar.

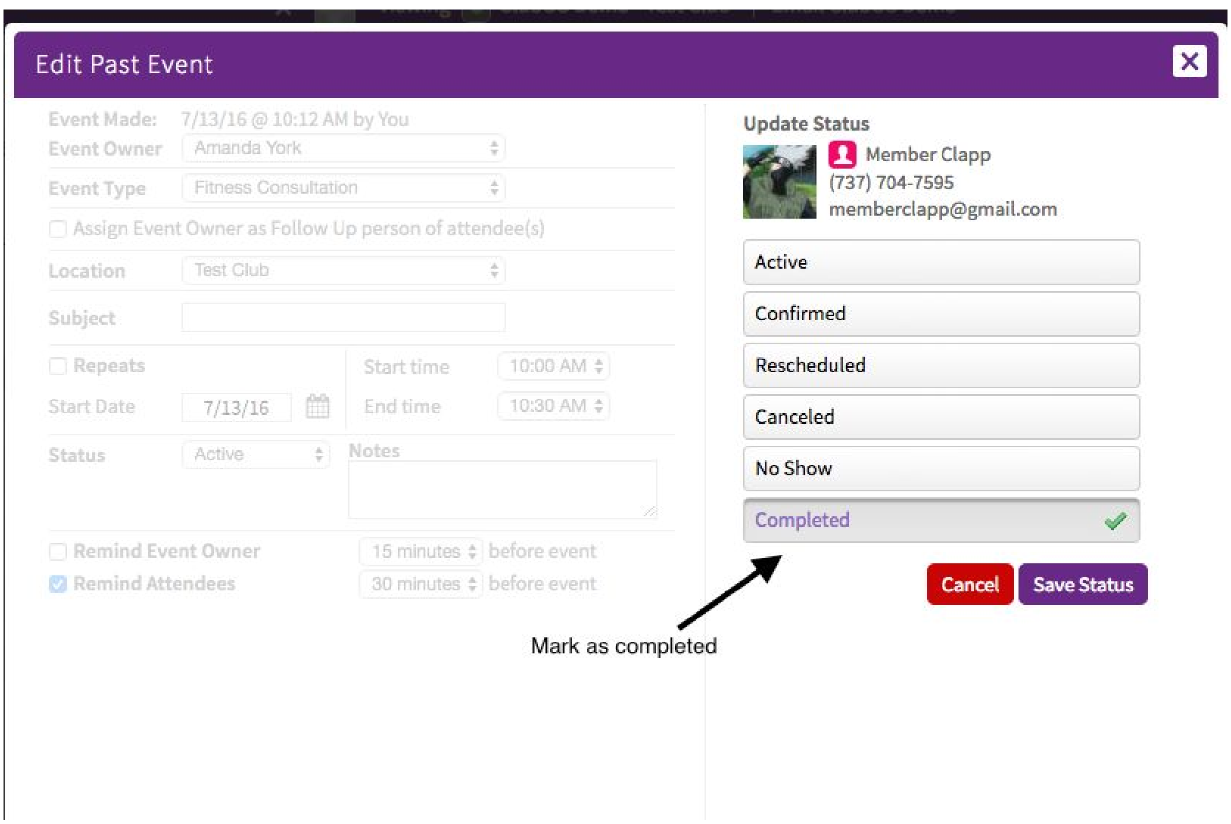

Edit Past Event
Event Made: 7/13/16 @ 11:44 AM by You
Event Owner ClubOS Demo
Event Type Fitness Consultation
Assign Event Owner as Follow Up person of attendee(s)
Location Test Club
Subject
Repeats
Start Date 7/13/16
Start time 10:30 AM
End time 11:30 AM
Status Active
Notes
Remind Event Owner 15 minutes before event
Remind Attendees 2 days before event
Update Status
Member Clapp
(737) 704-7595
memberclapp@gmail.com
Active
Confirmed
Rescheduled
Canceled
No Show
Completed
Cancel
Save Status
Close and discard changes
Remove Event
Save Event


10:30 - 11:30
Member C. @ Test Clu
Confirmed
10:30 (1)
Test Club
11:00 (1)
Test Club
11:30 (1)
11:30 (1)
Test Club

### 3.3. Marking the outcome of an FC

To render an FC session you will need to manually mark the calendar event as completed.It is important to note here that key fobs do not automatically render FC sessions. If an FC session is not marked as completed, it will default on the next business day to a 'No-Show' status.To do this, complete the following steps:

a) Find the event on the calendar.
b) Click on the drop down menu on the right (as shown in the picture below) to view a list of available statuses.
c) Select the status 'Completed'. Don't forget to save the status and event before exiting the window.



**<u>Statuses of PT events</u>**

The calendar allows you to choose different statuses based on the outcome of the event. Following is a brief explanation of each of these statuses:

| **Status** | **Description** |
|---|---|
| Active | This is the default status for all events. |
| confirmed | Selecting this status indicates that the member has confirmed the appointment. |
| Rescheduled | You will select this status if the member wants to reschedule their appointment. If you reschedule the appointment, you will have to book the appointment again on another date. |
| Canceled | Selecting this status will cancel the appointment |
| No Show | Select this status if the member does not come to the appointment |
| Completed | This will be selected if the member comes to the event and completes it. |

<u>Best Practice:</u>

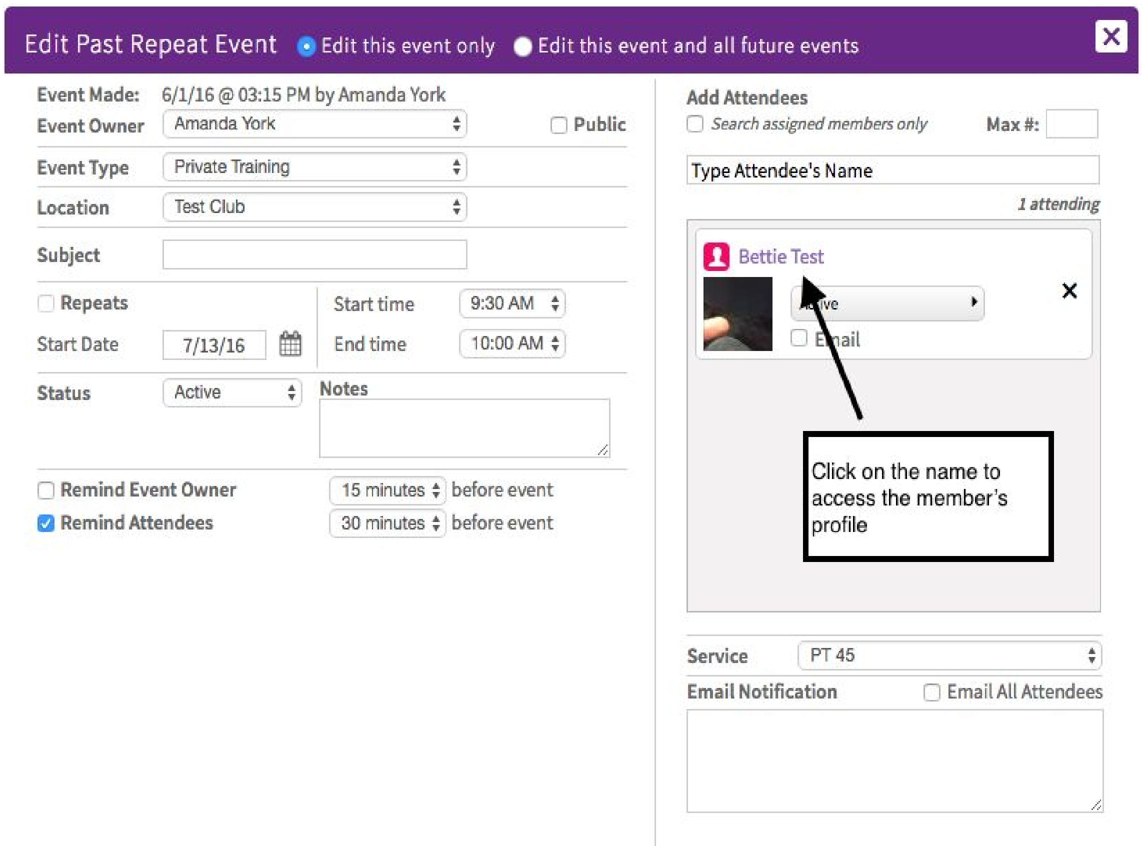
- Mark all fitness consultations that have been completed today as 'complete'. They will be marked automatically as completed if the member came in using the key FOB. Marking your fitness consultation as completed will ensure the following:
    - Trainer will get paid as the appointment will be reflected in the payroll report.
    - KPIs will be updated for fitness consultations.
- Mark all scheduled fitness consultations for the next day as confirmed, after confirming them with the member. It is advisable to remind them 24 hours in advance to avoid cancellations.
- To pay trainers for fitness consultations, complete the following steps:
    - Schedule a Fitness Consultation on the calendar.
    - Add the member you would like to schedule the FC with to the calendar event.
    - Select 'Fitness Consultation' on the event type.

- Add the fitness consultation service in ‘service’ section of the pop-up window.
- Mark the event as completed to ensure that the trainer gets paid for it.

## 4. Member Profile

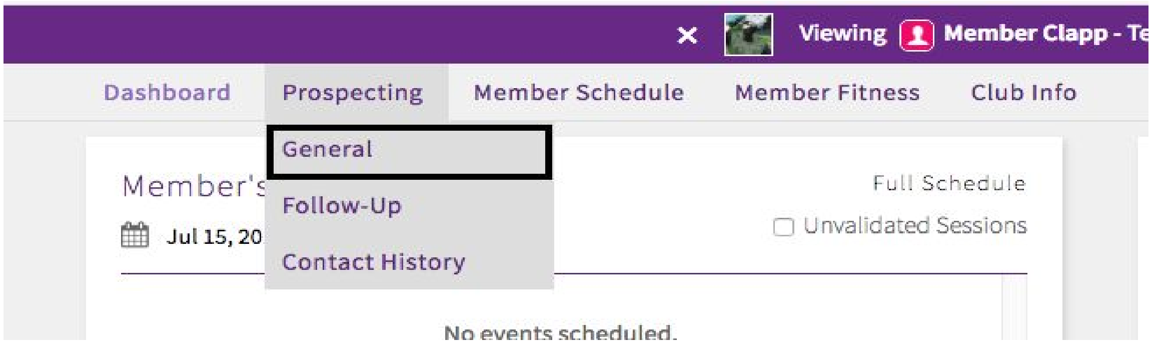
### 4.1. Accessing the member profile and general navigation

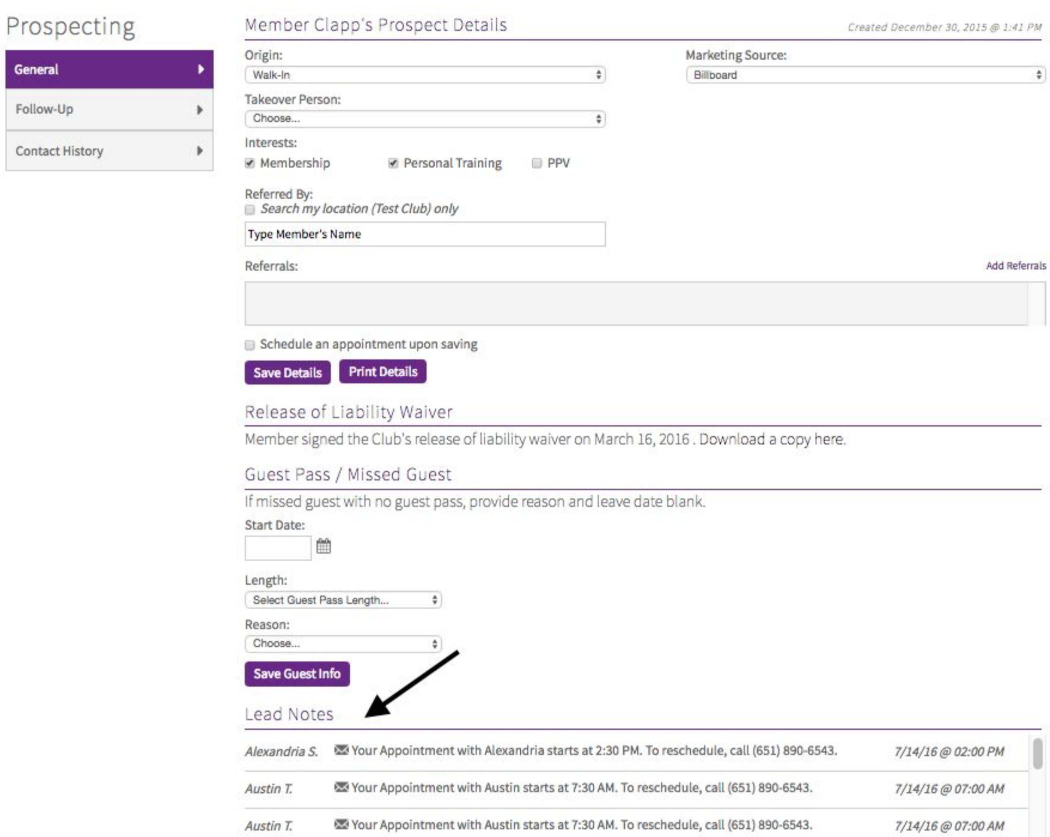
To access the member’s profile, utilize the search bar at the top of the page. You can also click on the member’s name from the calendar event to access their profile (as shown below).




### 4.2. Adding Notes to the member’s profile

To add notes on a member’s profile navigate to the member’s profile (see 4.1) and then click on Prospecting→ General. Scroll down to the bottom of the page to access the notes section. Adding notes in this section will also populate the information in Club Hub. Lead notes are a very good way to personalize follow-ups as these notes show in the follow-up window. This will ensure that the entire team at your location has the latest information about the member.



### 4.3. Viewing the member's dashboard

Access the member's profile and then click on dashboard to view information about the member.

- Member's Schedule: The schedule section will show you the member's scheduled appointments.


- Messages: Messages section will display the list of messages that involve the member.

### 4.4. Member Fitness

Fitness Profile (Member Fitness→ Fitness Profile)

This section can be used to store various information about the member that is collected during the fitness consultation session.
*Note:* This information will not be synchronized with Club Hub. To ensure your notes are synchronized with Club Hub use 'lead notes' to enter notes.

- Health Bio
- Measurements
- Goals
- Files: Use this to upload the MOP (member onboarding process) report.
- Photos: This section could be used to save before and after photos for members.

History (Member Fitness→ History)

This section will allow you to view the member's history.

## 4.5. Selling PT packages

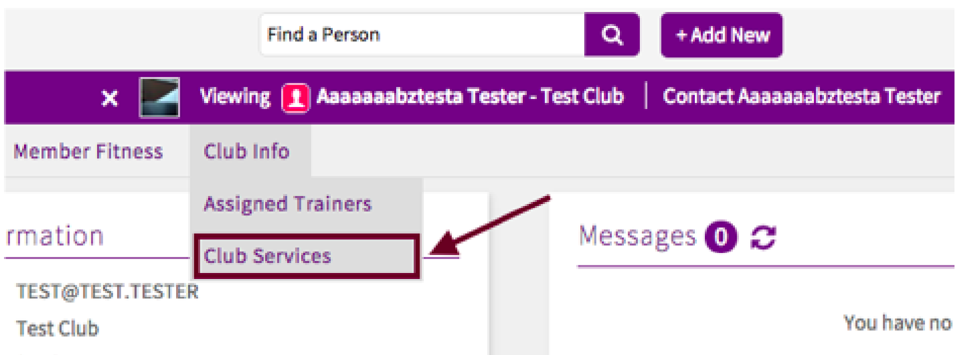
To sell a PT package, complete the following steps:

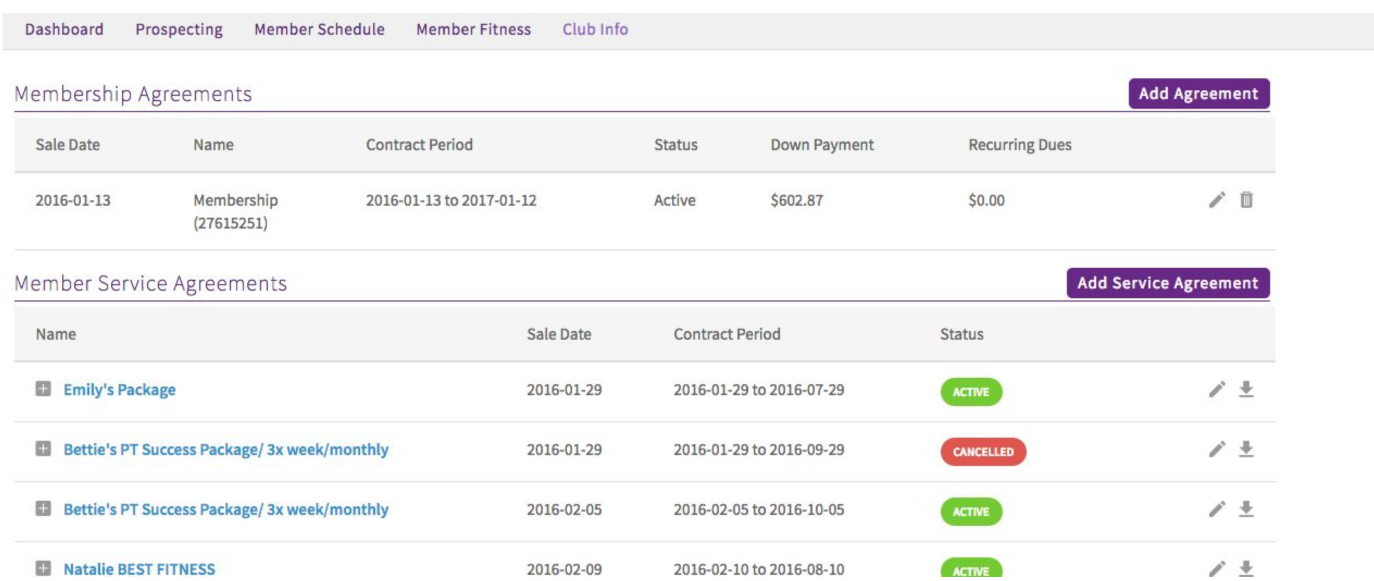
### 4.5.1. Access the member's profile

Club Info→ Club Services→ Add new member service

a) To sell a PT package you will first need to navigate to the member's profile.
To do this, you can either utilize 'user search' or the search box at the top of the home page.

b) Next, click on 'Club Info' and select 'Club Services' to access the membership agreements page

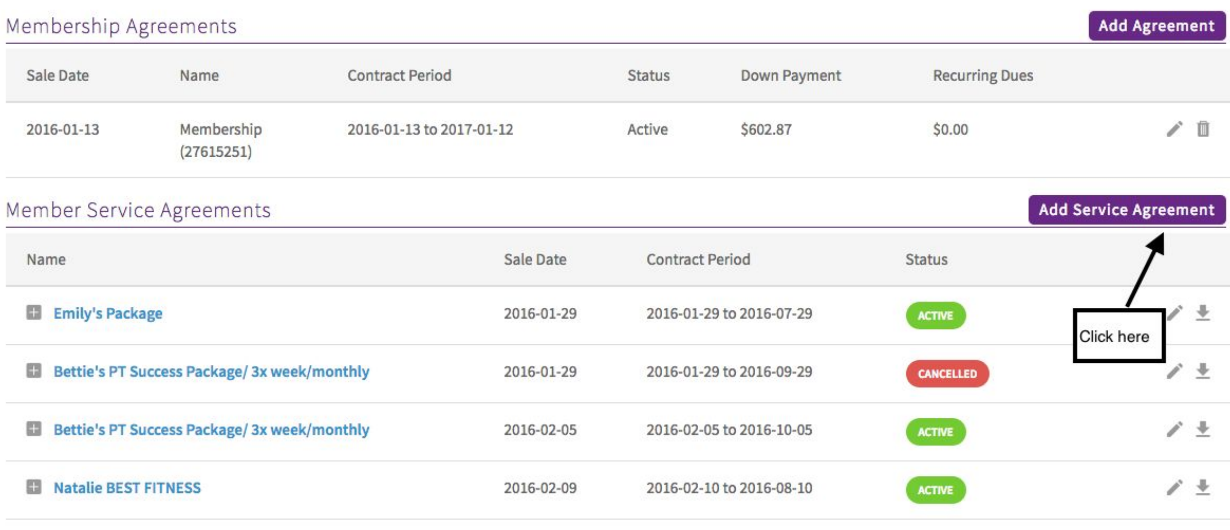


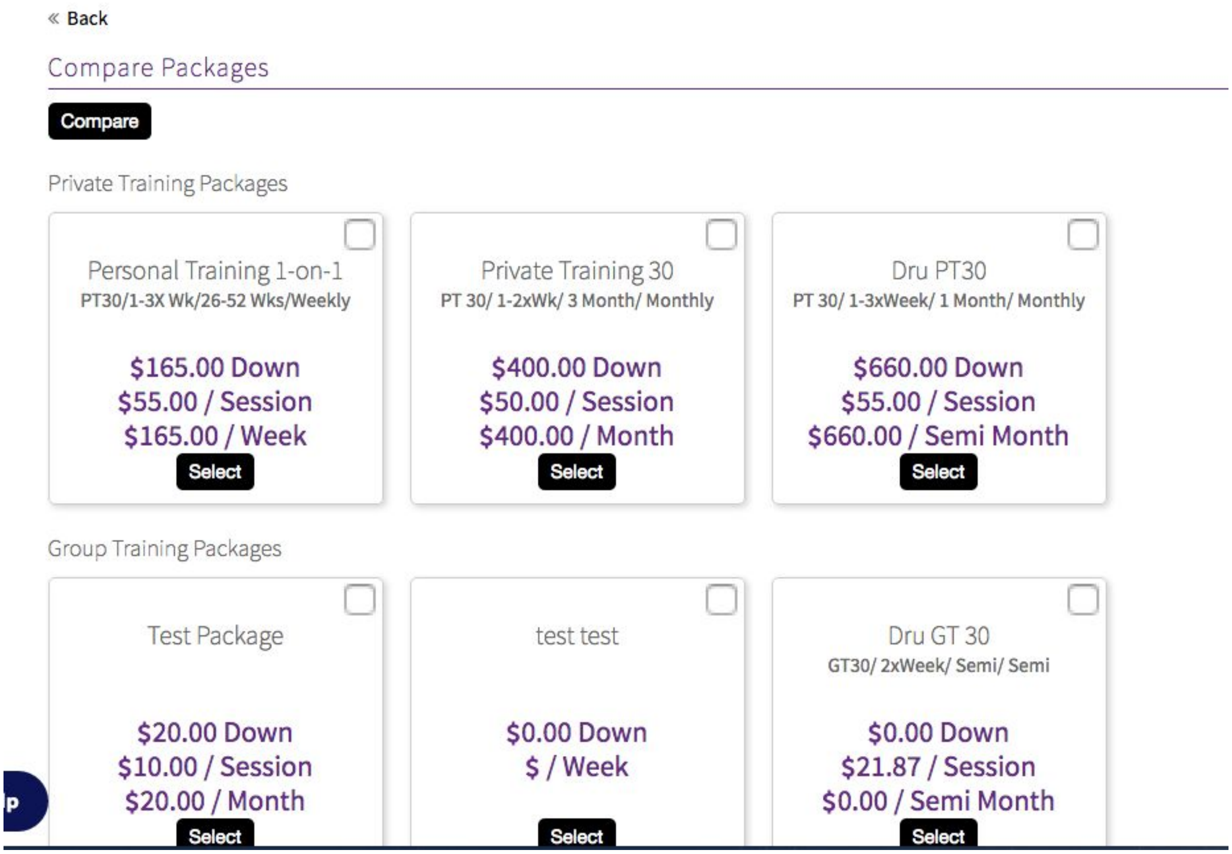



### 4.5.2. Add a member service agreement

Once you have accessed the member's profile, proceed to add a new member service agreement. To do this, click on 'Add New Member Service'. This will display a list of available packages at your location. The packages are grouped into three different sections

- Private Training Packages
- Group Training Packages
- Semi Private Training Packages

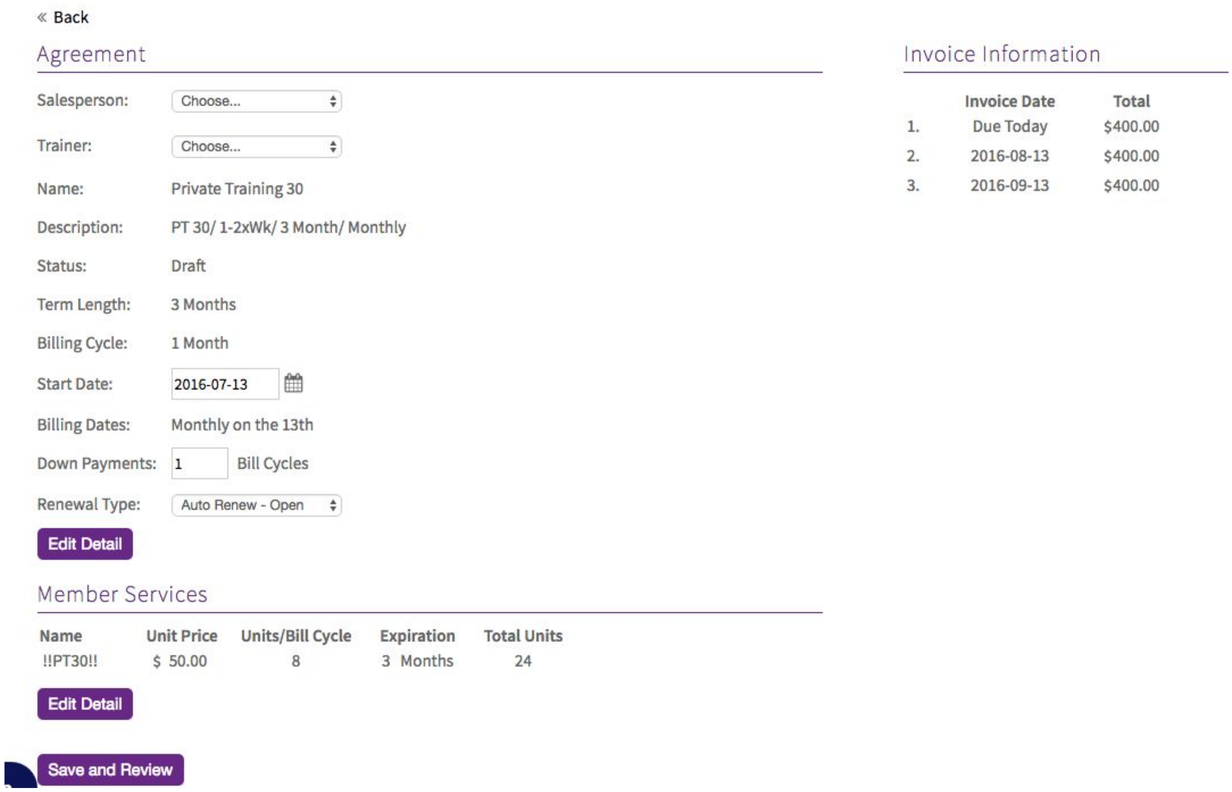





<u>**Tip**</u>: It is best practice to show clients a pricing sheet of the packages at your location and to get their preference before showing them PT screen.

### 4.5.3. Select the package

Choose the correct package and click on 'Select' to proceed. This will bring you to the package selling screen. Fill out the details on this package as needed.

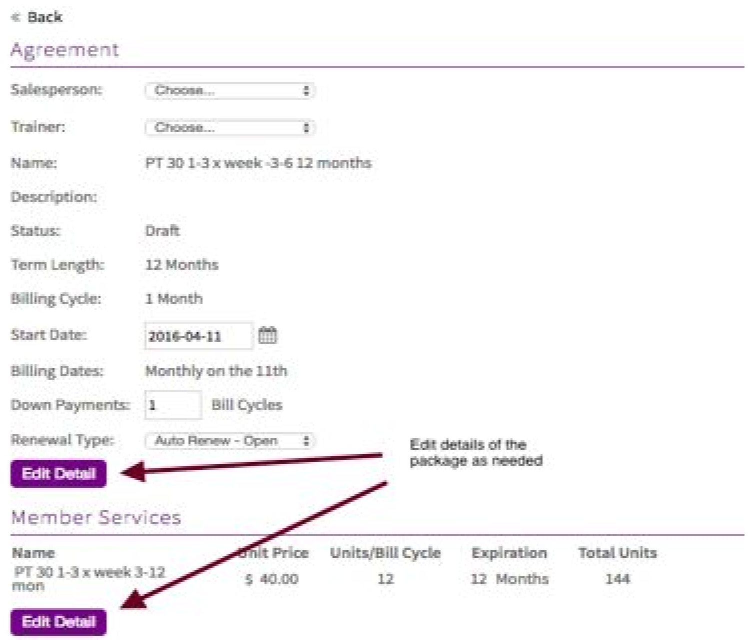


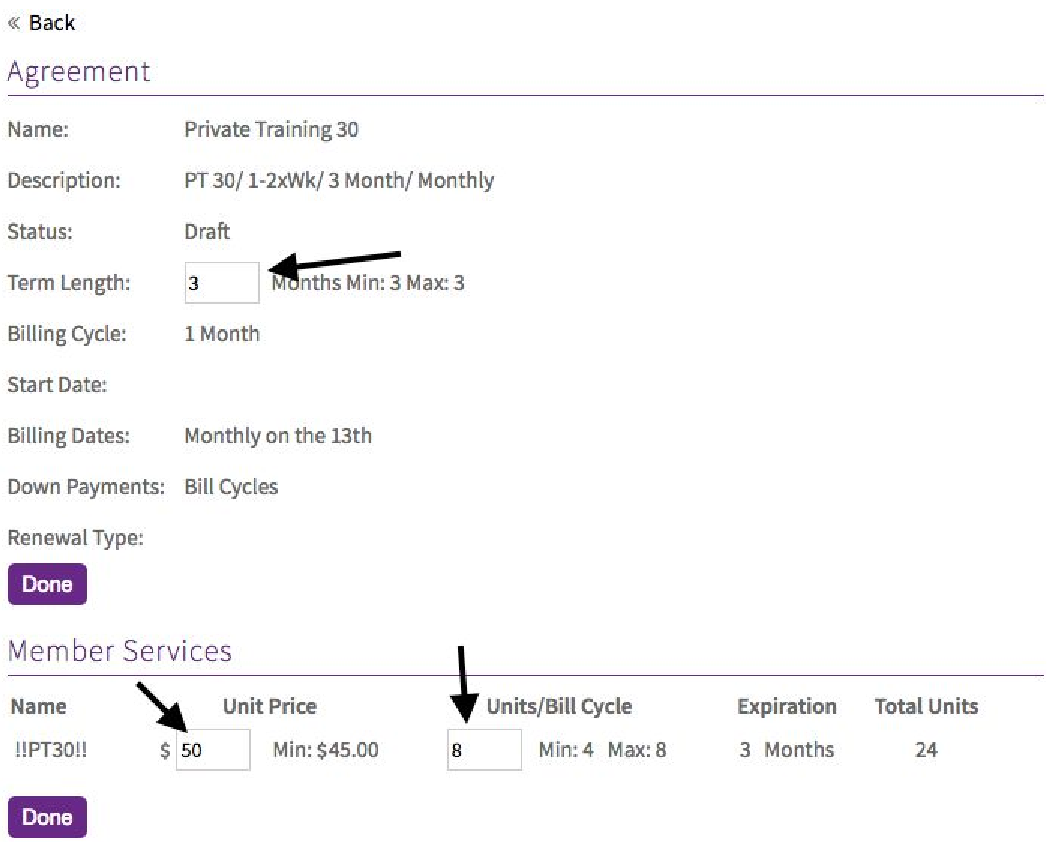

### 4.5.4. Edit Package Details

When selling the package, you have the option to edit package details. The PT system allows you to edit details for term length, unit price and units/bill cycle.

- *Term Length:* This refers to how long the package is valid for (how long the client will be billed for the selected package).
- *Unit Price:* The cost of one package.
- *Units/Bill cycle:* This demonstrates the desired, ‘standard’ amount of sessions that will be offered per billing cycle.

To edit the details of the package click on ‘Edit Detail’.


« Back
Agreement
Salesperson: Choose...
Trainer: Choose...
Name: PT 30 1-3 x week -3-6 12 months
Description:
Status: Draft
Term Length: 12 Months
Billing Cycle: 1 Month
Start Date: 2016-04-11
Billing Dates: Monthly on the 11th
Down Payments: 1 Bill Cycles
Renewal Type: Auto Renew - Open
Edit Detail
Edit details of the package as needed
Member Services
Name
Unit Price
Units/Bill Cycle
Expiration
Total Units
PT 30 1-3 x week 3-12 mon
$ 40.00
12
12 Months
144
Edit Detail


« Back
Agreement
Name: Private Training 30
Description: PT 30/ 1-2xWk/ 3 Month/ Monthly
Status: Draft
Term Length: 3 Months Min: 3 Max: 3
Billing Cycle: 1 Month
Start Date:
Billing Dates: Monthly on the 13th
Down Payments: Bill Cycles
Renewal Type:
Done
Member Services
Name
Unit Price
Units/Bill Cycle
Expiration
Total Units
!!PT30!!
$ 50
Min: $45.00
8
Min: 4 Max: 8
3 Months
24
Done

### 4.5.5. Adjusting the down payment amount

On the package agreement screen, you have the option to edit the down payment amount.

- You can pay for a package in full by increasing the down payment amount to the total number of billing cycles (total term length). This will release all the sessions in your agreement.
- If the down payment amount is 1 / bill cycle, then the first invoice will be charged immediately upon saving. This will release the first set of sessions tied to the first invoice.
- If the down payment amount is 0/bill cycle,the down payment amount will not be taken out immediately. This means that sessions will not be released immediately.

### 4.5.6. Draft Dates

The draft date field on the package selling screen defaults to the day you are selling the agreement. This allows for the first invoice to be paid automatically when the package is saved (releasing the first set of sessions).
However, the system gives you the flexibility to set a future date for the package. Configuring it for a future date will not release the first set of sessions automatically. To release the sessions immediately, pay for the sessions by clicking on ‘pay now’ next to the invoice amount.

Note: Draft dates can not be edited after being selected. If a change is needed, the current agreement will need to be canceled and another one drafted.

### 4.5.7. Renewal Types

You can alter the the package’s renewal type on the package agreement screen. The different possibilities of renewal type values are explained below:

- *Auto Renew Open:* Once the original term is honored, then this package is renewed on a month to month basis until canceled.
- *Auto Renew Term:* Once the original term is honored, the agreement will auto-renew for the same term length.

- *None:* Selecting this option will stop the package from auto renewing after the term expires.

### 4.5.8. Terms and conditions

This section presents the terms and conditions for the package. Allow the client to read through the terms before proceeding to the next section. Click on 'save and review' to review the agreement before allowing the client to sign it.

### 4.5.9. Payment Profile

There are three different types of payment systems:

- Cash/Check
- Credit card
- Checking/Savings

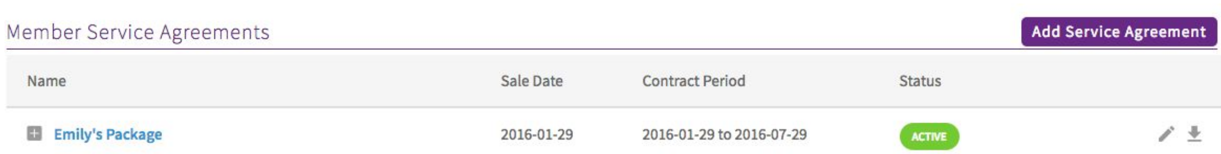
If you would like to charge clients for the down payment amount within Club OS then choose the credit card option. If you are taking the down payment in cash then mark the down payment field as 'cash/check'.

Note: A payment profile is required for recurring payments.

Once the agreement is signed and submitted, an email will be sent to the client with a copy of their agreement. You can always print out a hard copy of the PT agreement for your clients by clicking on the PDF icon next to the agreement. Please note that after this step further edits to the agreement cannot be made (with the exception of adding a new payment profile).

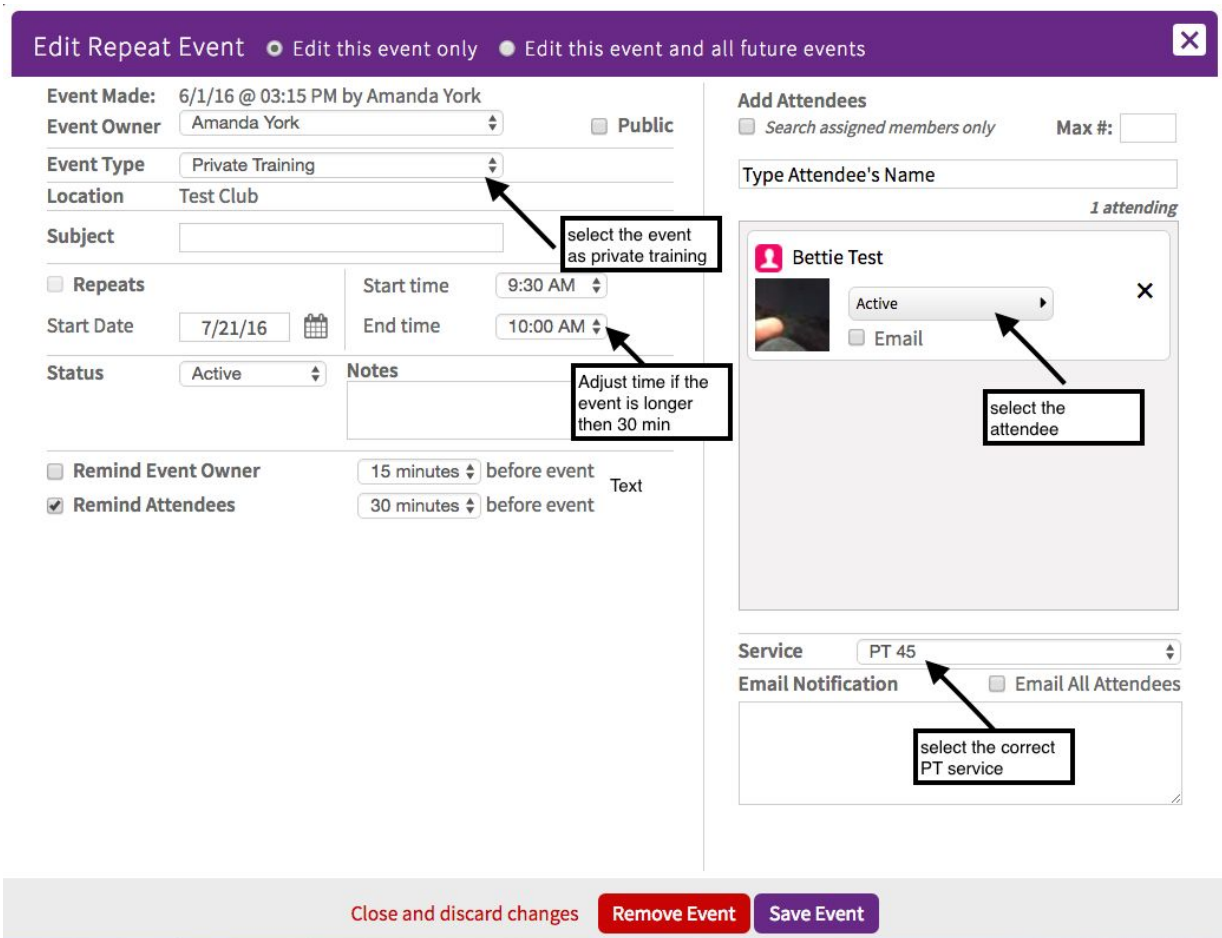
### 4.5.10. Viewing the member service screen

After selling the package, you can navigate to the member service screen to view the package that was sold. It will have an 'active' status in green displaying, indicating that sessions can be scheduled.



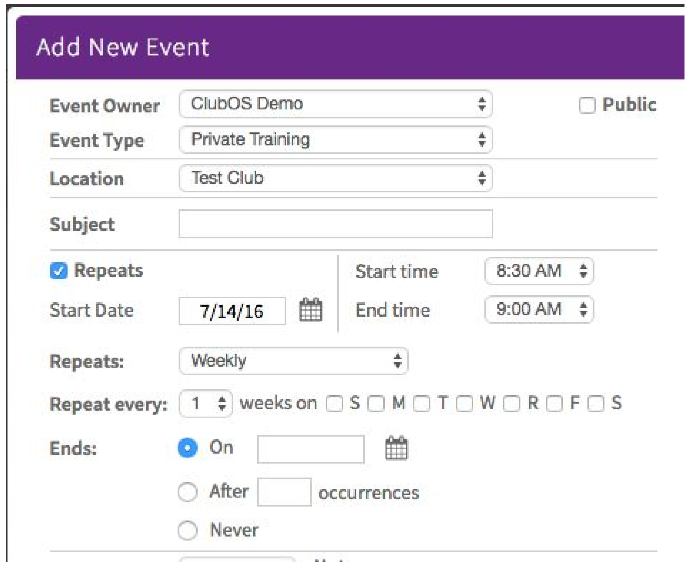
### 4.6. PT Events (scheduling and completing)

#### 4.6.1. Scheduling PT events




To book a PT event complete the following steps:

a) Navigate to the calendar (My schedule→ Calendar)
b) Click on ‘Add event’ to add the event. A popup ‘Add New event’ will display. Fill out the fields as needed.
   - Select the correct member service from the drop down menu.The drop down menu will list all the services available to the client. Choose appropriately.
   - For setting up recurring events, click on the box labeled ‘repeat’ and specify the number of times you want the event to be repeated




**Funding Status of events:**

After the event has been added, its funding status will be calculated and displayed. A green dollar sign next to the event indicates that the event is funded (as shown in Figure 1). If the event has not been funded, a red dollar sign will appear next to it (as shown in Figure 2).

Figure 1:

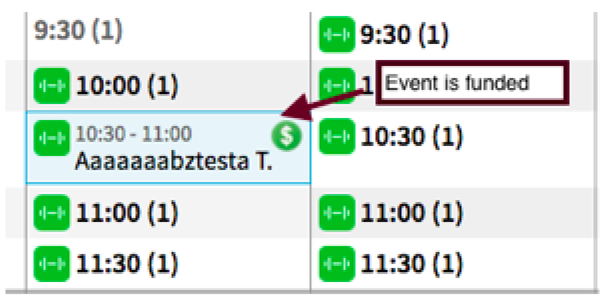
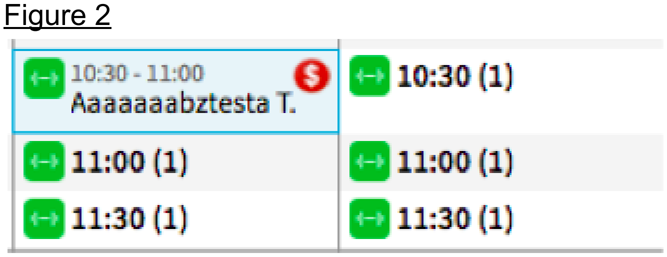


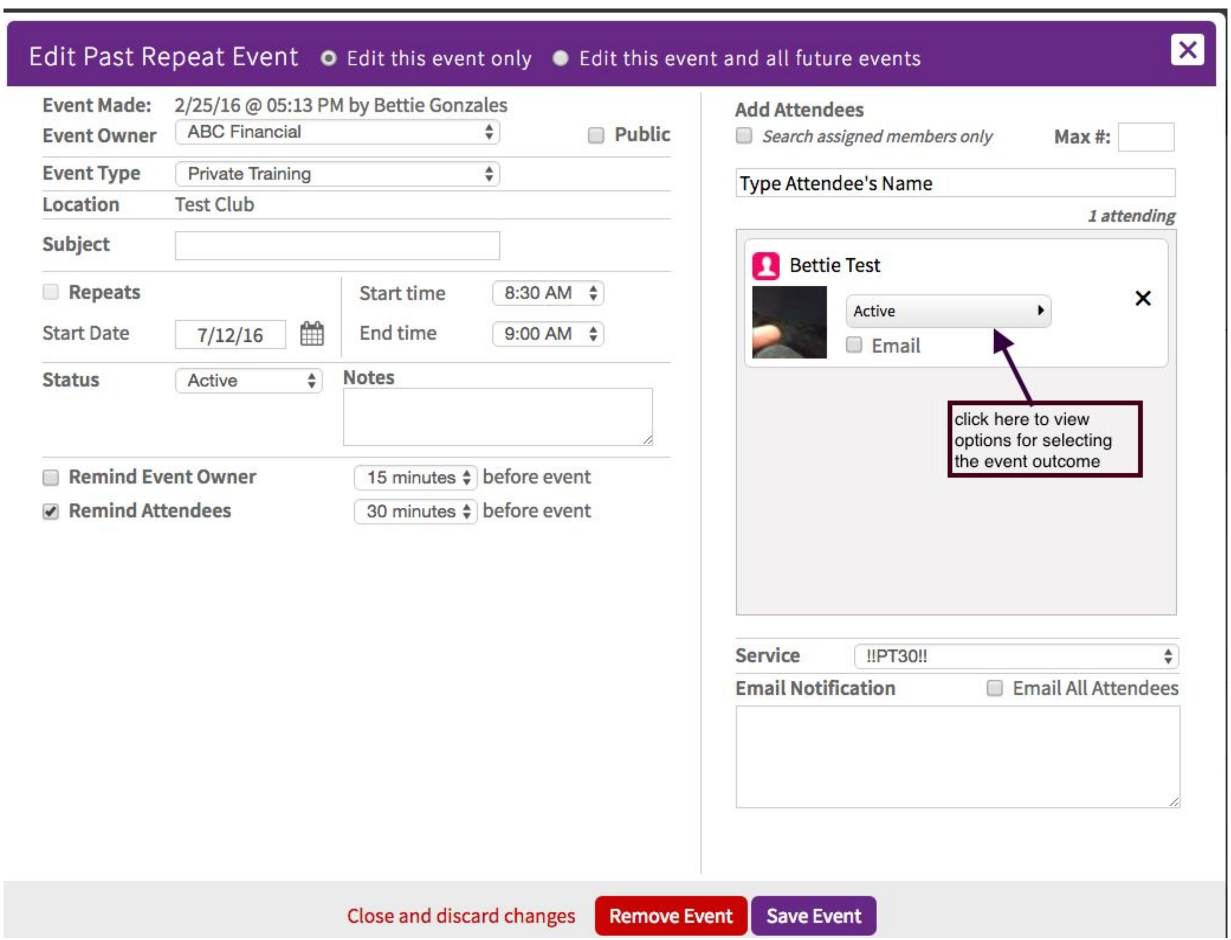

Figure 2

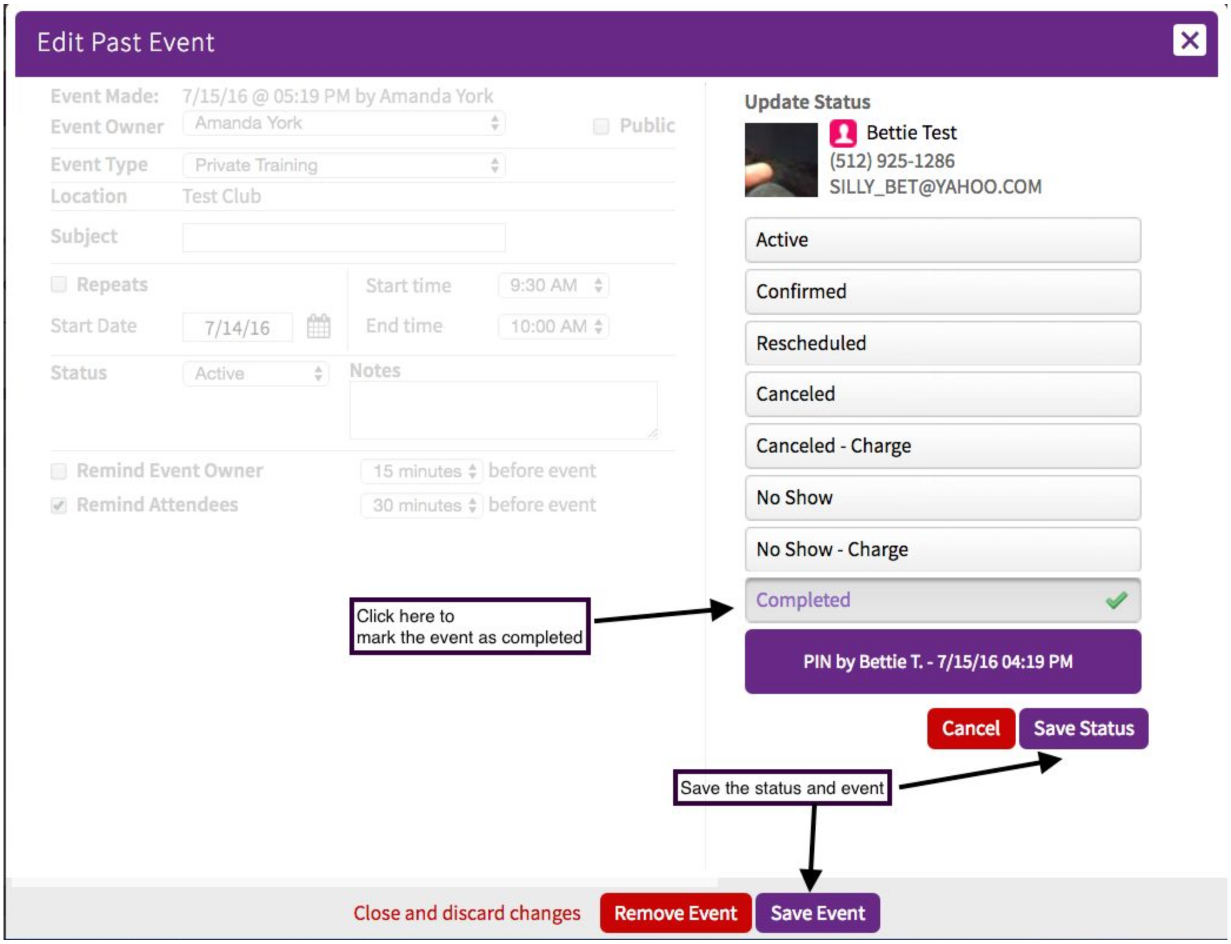


Note:
In the case of recurring events, the funding status (dollar sign) is displayed only for the first event in the series. The funding status for the next subsequent event in the series is displayed only after the previous event is completed. The funding status for any event in the PT recurring series can also be displayed by editing the event in the series.

#### 4.6.1.1. Marking PT events as completed

To be paid for an event, the event has to be marked completed. If a member checks in using the KeyFob, the event will be automatically marked as completed. If a KeyFob check in does not take place, then the event will have to be manually marked as completed.

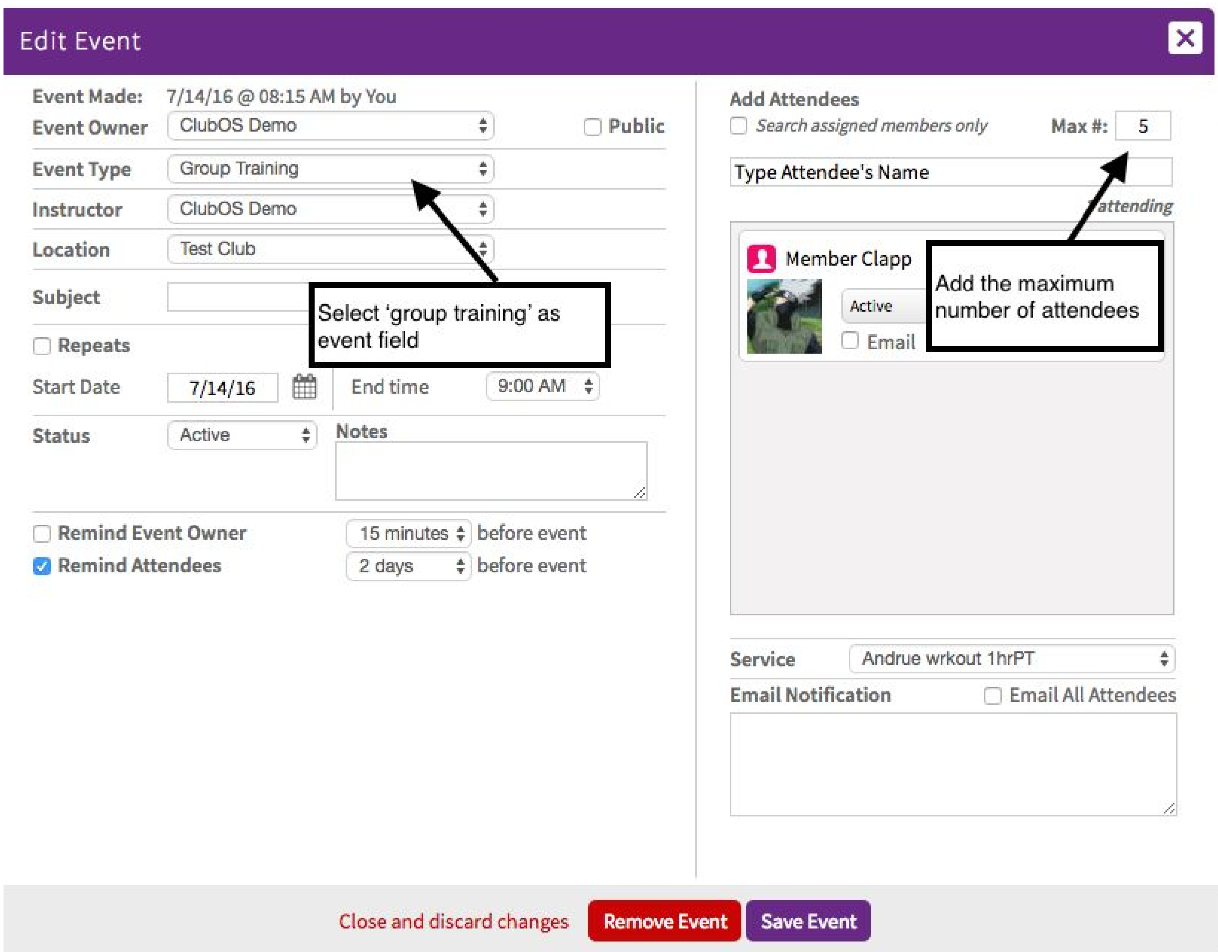





### 4.6.2. Scheduling Group Training events

To schedule a group training event, complete the following steps:

- Access the calendar (staff schedule→ calendar)
- Click on ‘Add Event’ and a popup event window will display.
- Fill out the fields as needed.
- Event Type should be selected as ‘Group Training’.
- Decide on the maximum number of attendees and input that value in the box on the right of the window (refer to pic)



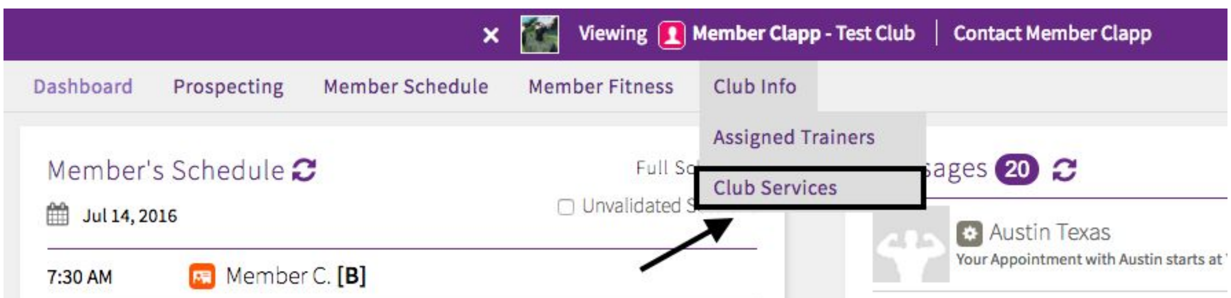

- After you save the event, it will display on the calendar with the event name and the number of openings remaining. In the example above, only one member was added to the event with a capacity of 5. The calendar will display 4 openings as remaining.

- Add the attendees as needed. The system allows you to add additional attendees at a later time to the same event (if needed).
- For group events, always make sure you are adding the same service for the group members who are training together. This will ensure that your members are attending the same group event.

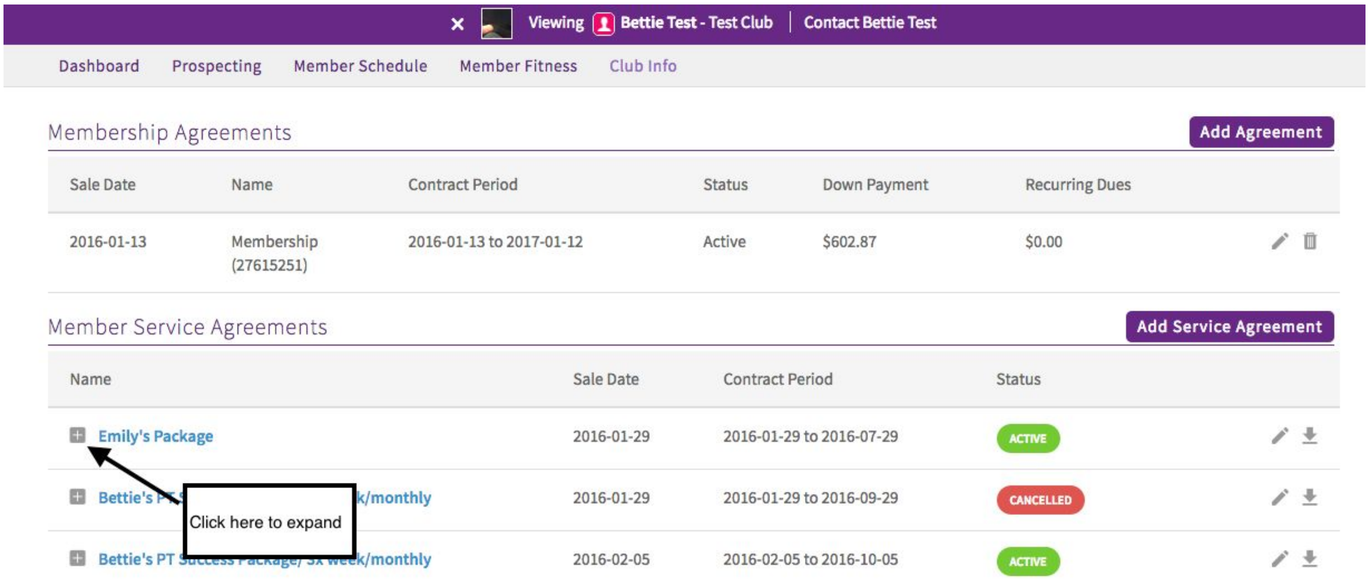
## 4.7. Managing personal agreements for clients

### 4.7.1. Viewing the member service screen

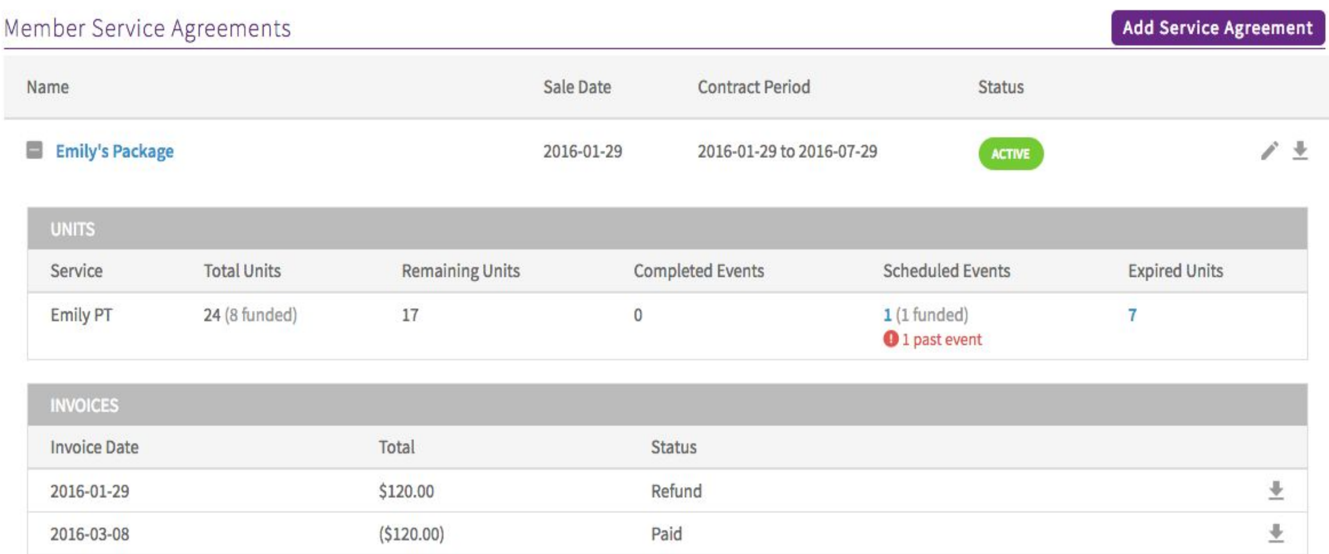
- To manage a member's service agreements, navigate to their profile and then click on Club Info→ Club Services. This will display a list of agreements for the member.




- Click on the '+' sign to expand the agreement. Expanding the agreement will help you view the member's inventory and invoices.




Expanded View:




### 4.7.2. Description of the inventory screen

- <u>**Total Units:**</u> This is the number of total units in the agreement. It does not include voided (written off) and refunded invoices. *Total Units* = paid invoices + comped invoices + future invoices + unpaid invoices + delinquent invoices

- ○ **Total Units (funded):** This is the number of total units in the agreement that are funded.
  Total units (funded)= paid invoices + comped invoices

- **Remaining Units:** This displays the total number of available units that have yet to be completed/consumed.

Remaining units = Total units - completed events - expired units

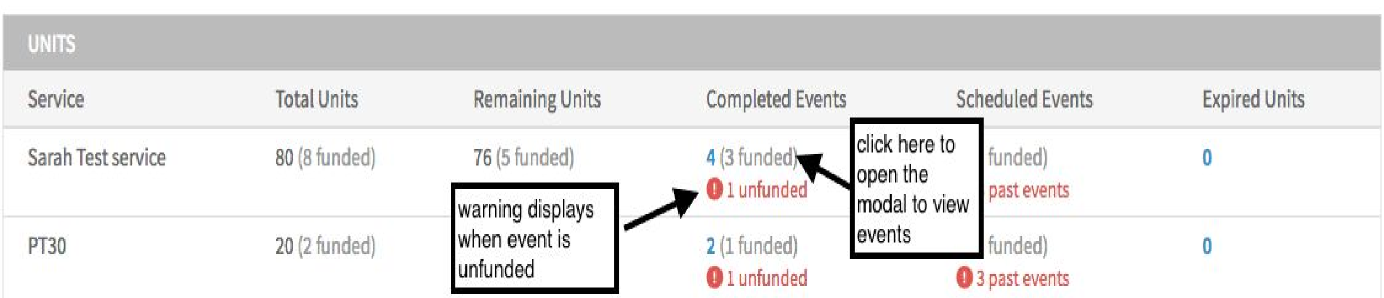
  - **Remaining units (funded):** This displays the total number of funded available units that have yet to be completed or consumed.

  = Total funded units-completed funded units-expired units

- **Completed Events (and # funded):** This is the number of events with the member service selected that have been set to
  a) Complete: This means the event was completed and the member was charged
  b) Cancel- Charge: event was canceled but member was charged
  c) No Show- Charge: Member didn't show up for the event but got charged.

  Note: Events that are set to a completed, non-chargeable state (rescheduled- Cancel No show) will not appear in this unit screen because they don't consume inventory

  - This screen displays a warning to show if there are unfunded events.This will alert staff that the trainer will not be paid for these events unless the funding is remedied. Staff can click on the completed events number to open the modal that will identify these events.




- **Scheduled Events:** This is the number of events with the member service selected that are in a non-complete state (active/confirmed).

This will mainly represent future events. However, it is possible for a past event to still be in a non-complete state (member did not check-in/trainer didn't manually complete the event).

-This screen displays a warning if there are events in the past that are still in a scheduled state. This will help alert staff that there are past events that have not been set to a completed state. Trainers will not get paid unless these events are marked as completed.

| UNITS | | | | | |
|---|---|---|---|---|---|
| Service | Total Units | Remaining Units | Completed Events | Scheduled Events | Expired Units |
| Sarah Test service | 80 (8 funded) | 76 (5 funded) | 4 (3 funded) | 8 (5 funded)<br>8 past events | 0 |
| PT30 | 20 (2 funded) | 18 (1 funded) | | 3 (1 funded)<br>3 past events | |

Click on the link to open the modal for viewing events

Warning indicates past events that need to be completed

- **<u>Expired Units:</u>**

  This indicates the number of expired units. Clicking on it will let you extend the expiration date. If you don't see the clickable link then you might not have access to extending expiration dates. In this case, contact your manager to discuss this permission.

### 4.7.3. Description of the invoices section and additional options

| INVOICES | | | | |
|---|---|---|---|---|
| Invoice Date | Total | Status | | |
| 2016-01-25 | $420.00 | Paid | Refund | |
| 2016-02-10 | $420.00 | Comped | | |
| 2016-02-25 | $420.00 | Paid | Refund | |
| 2016-03-10 | $420.00 | | Pay Now | |
| 2016-03-25 | $420.00 | | Pay Now | |

This section lists the invoices that are tied to a particular agreement. The system allows for comping, freezing and canceling agreements. It also gives you the option for refunding invoices if needed. These options are discussed below.

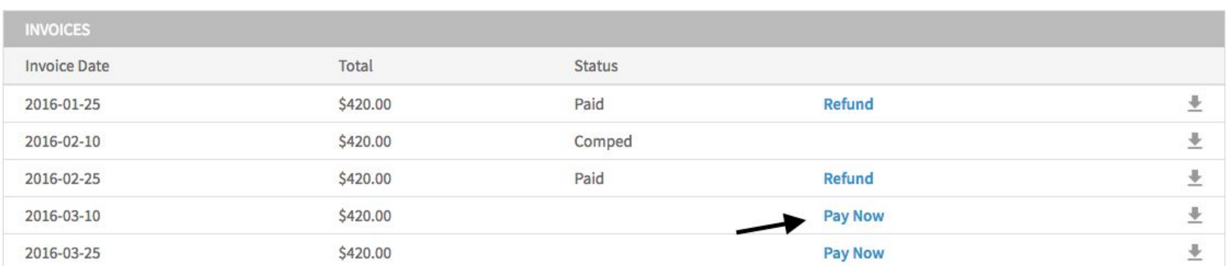
#### 4.7.3.1. Comping Invoices

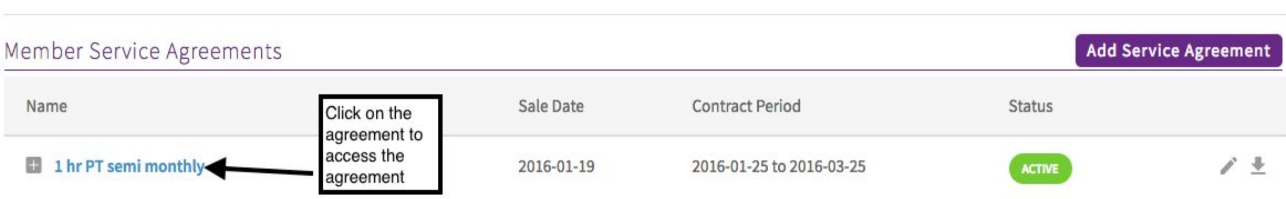
Comping an invoice gives sessions to a client free of charge. You can comp an invoice in four easy steps:

a) Navigate to the PT client's profile. Select the member service agreement you want to comp from the package display page .

b) Click on the 'Pay Now' link. This can be done from the agreement's page (as shown below). It can also be accessed by first clicking on an agreement (pic 2).

c) Select the option 'Comp invoice amount' to comp the invoice.



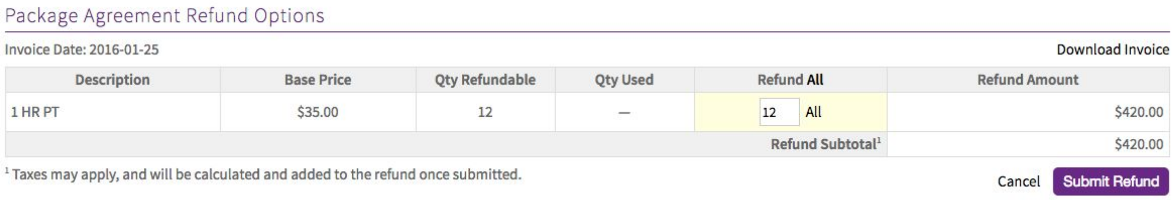

Clicking on ‘pay now’ will give you access to the payment page with additional options.

<u>Note:</u> Only future invoices can be comped.


#### 4.7.3.2. Refunding Invoices

Club OS allows you to refund invoices if needed. To refund an invoice:

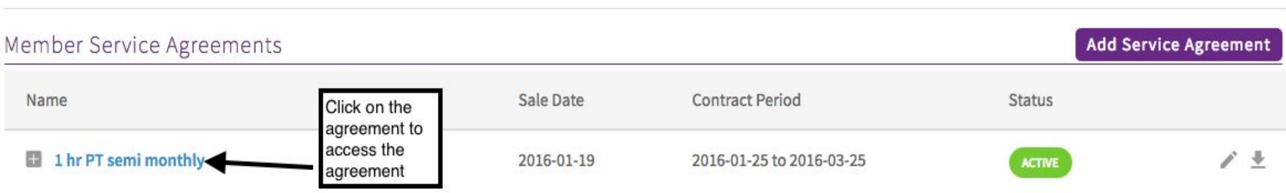
- Navigate to the PT client’s profile and click on *Club info → Club Services.*
- Click on the ‘Refund’ link under the ‘Invoices’ section.



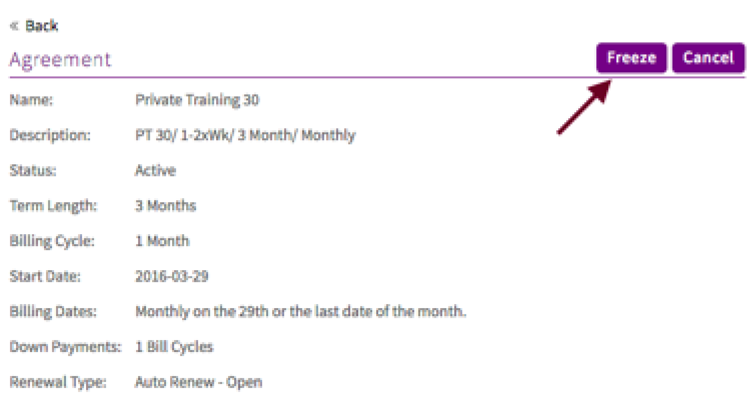

### 4.7.3.3. Freezing agreements

In certain situations, PT clients might want to put their agreement on hold (eg- when going on vacation, etc). Club OS allows you to freeze both future and active agreements. To freeze an agreement:

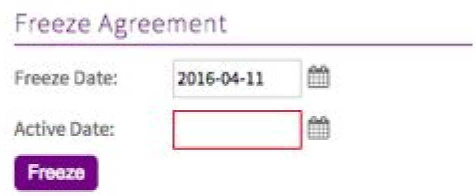
- Access the agreement first by clicking on its name from member service screen.




- Click on the 'Freeze button' on the agreement page.



- Input the correct values for the freeze and active date.
    - Freeze date: Refers to the date that the freeze starts.
    - Active date: Refers to the date that the agreement comes out of the freeze state.



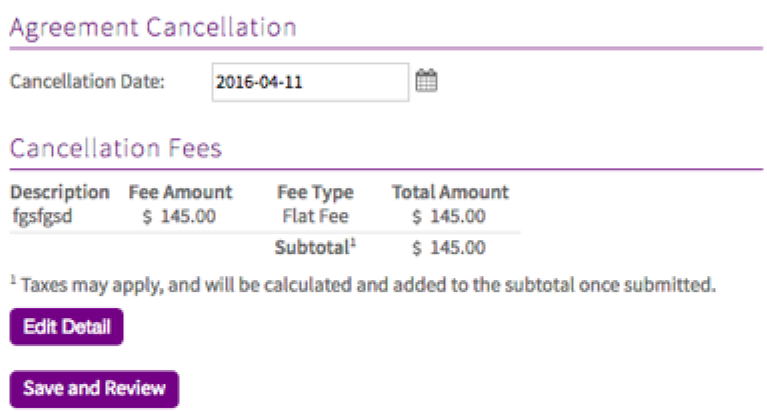

It is recommended to freeze agreements in billing cycle increments. This will ensure that billing dates shift forward correctly. If your bill date falls within the freeze time period, your invoice will be pushed out when the freeze ends.

<u>Note</u>:
You can use paid sessions when your agreement is frozen or cancelled.

#### 4.7.3.4. Cancelling agreements

To cancel an agreement, complete the following steps:

- Navigate to the PT client's profile
- Click on 'club info → club services'
- Click on the edit button next to the agreement that you wish to edit/cancel
- Click on the 'Cancel' button on the agreement's page.


## 4.8. Reports & KPIs

### 4.8.1. Payroll Reports

This report calculates PT sales and trainer commission for the selected period of time. This will give you useful information about sales and trainer commission for your location. To learn more, click here.

### 4.8.2. Vitals Report

The vitals report can be used to study membership and PT sales for the location.

#### 4.8.3. KPIs

Your dashboard KPIs will be real time updated based on your day's performance. They will record useful information like the number or fitness consultations made etc.

### 4.9. PT Best Practices

As a trainer, it is advisable to complete the following every day:

- Confirm the next day's scheduled fitness consultations. Give your clients a 24 hour reminder to ensure they attend the event.
- Mark the outcome of all of today's completed fitness consultations.
- Follow-up with members & prospects that are listed on the follow-up window.