

# Membership Management

## Client Guide



## **Table of Contents**

1.	Login.....	3
2.	Setting Availability.....	3
3.	Lead Management.....	7
3.1.	Adding a lead through Club OS .....	8
3.1.1.	Contact Information .....	8
3.1.2.	Account information .....	8
3.1.3.	Personal information .....	9
3.1.4.	Guest pass/missed guest .....	9
3.1.5.	Notes.....	9
3.1.6.	More options.....	10
3.1.6.1.	Adding referrals.....	11
3.1.6.2.	Scheduling an appointment upon saving.....	12
3.2.	Adding a lead through DGW.....	14
3.3.	Web Leads.....	17
4.	Scheduling Appointments.....	17
4.1.	Marking Fitness consultations as confirmed.....	23
4.2.	Selling PT packages at point of sale.....	24
5.	User Search Actions & Note Capturing.....	24
5.1.	Accessing User Search.....	24
5.2.	Deleting/undeleting prospects/members.....	25
5.3.	Lead Notes.....	25
6.	KPIs and Follow-ups.....	26
6.1.	KPIs.....	26
6.2.	Follow-ups.....	26

## 1. Login

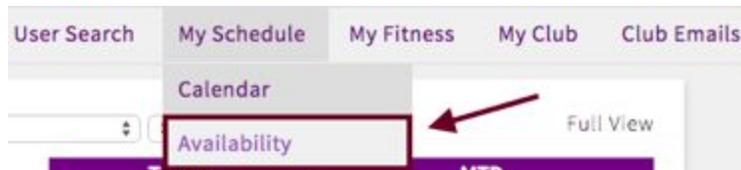
- 1.1. Log into anytime.club-os.com . Click [here](#) to learn more about browsers that are currently supported.
- 1.2. If you have issues logging in click on forgot password. Click [here](#) to learn more

## 2. Setting Availability

As an H2i, you will be scheduling club tours for prospects. To do this, you will first have to set your availability. This will ensure that you are scheduling tours only in the time slots you are available at. It will also help other staff members know your availability times before putting something on your calendar.

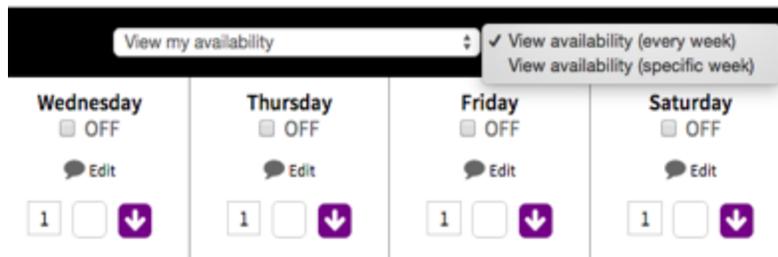
### Step 1

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



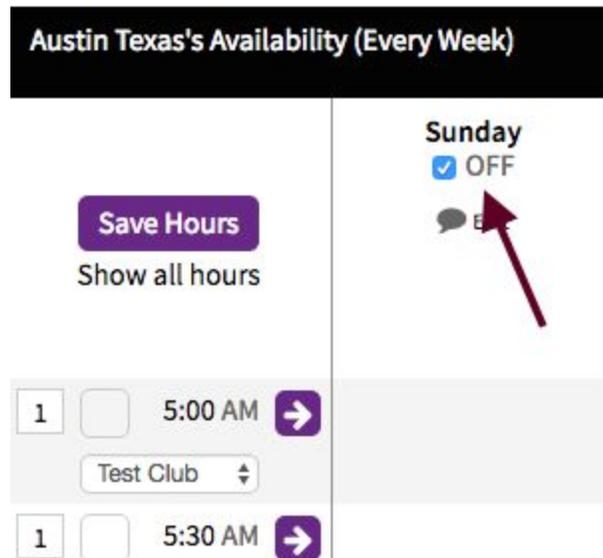
### Step 2

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.



### Step 3

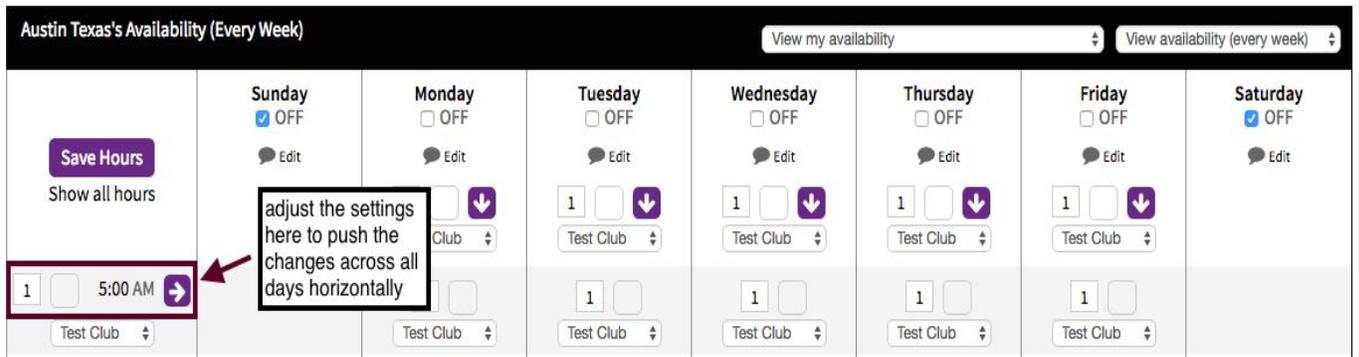
Next, mark the day as off if you will be unavailable on that day. This will ensure that appointments are not booked on that day. It will also prevent follow-ups being populated on that day.



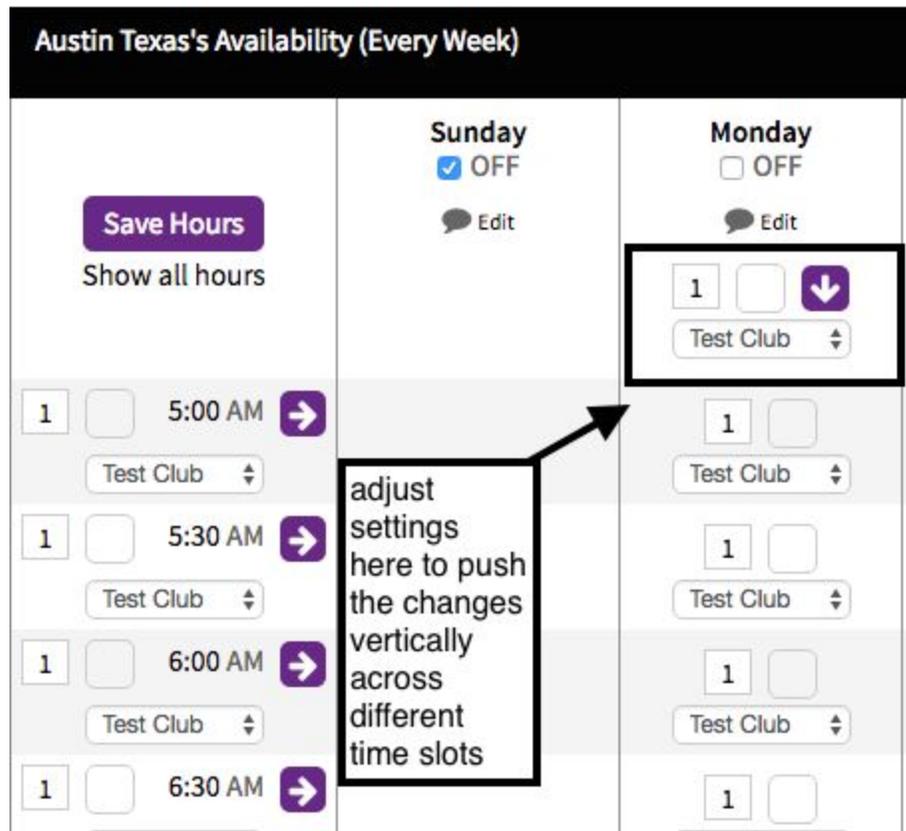
### Step 4

Set the availability horizontally or vertically

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

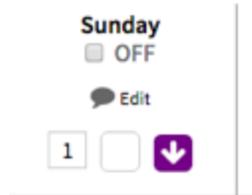


- Vertically: It can also be set vertically for the same day (over multiple time periods).

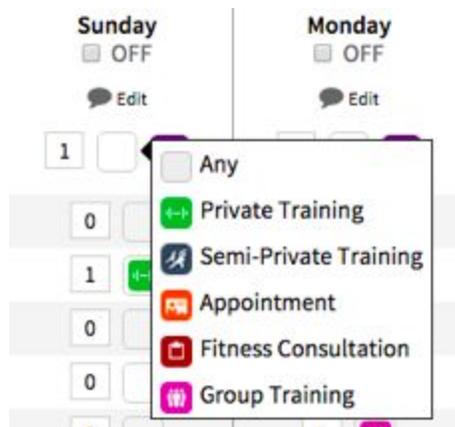


a) The first field is for setting the number of appointments you are available for in a given time slot. Best practice for H2i's and trainers is to choose '1' to avoid double booking.

0= unavailable  
1= available  
2= double booked

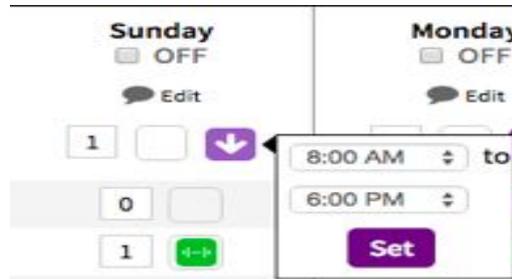


b)The next step is to select the type of event. Clicking on the second box will display a number of options to choose from as shown in the picture below.

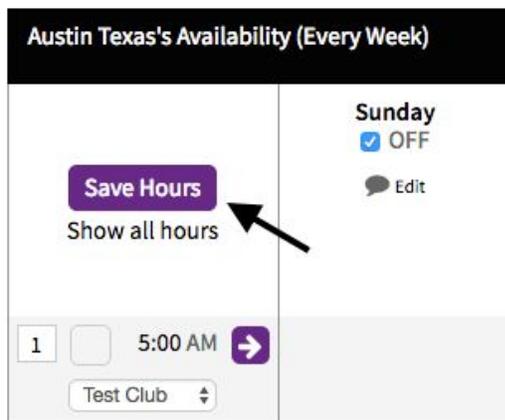


- Appointment icon (orange) is reserved primarily for an H2i. It is used to indicate a club tour. When you log in to view your calendar, the system by default will show orange icons. Other icons shown in the picture will mostly be utilized by the personal training team. However, if you are an H2i and utilize those types of appointments, you can select them from the list as needed.
- 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. Lead Management

A lead by definition is a prospect (someone who is not a member yet) who is inquiring about your gym. A lead can inquire about your gym via phone, through online sources (webforms) or by directly walking into the gym. Club OS helps you record this information. Recording this information will help you follow-up with leads in a timely and efficient manner. Also, when you add leads, you have the chance to acquire referrals from leads. That would bring more business to your gym.

There are two ways to add leads to Club OS based on the way they reach out to you.

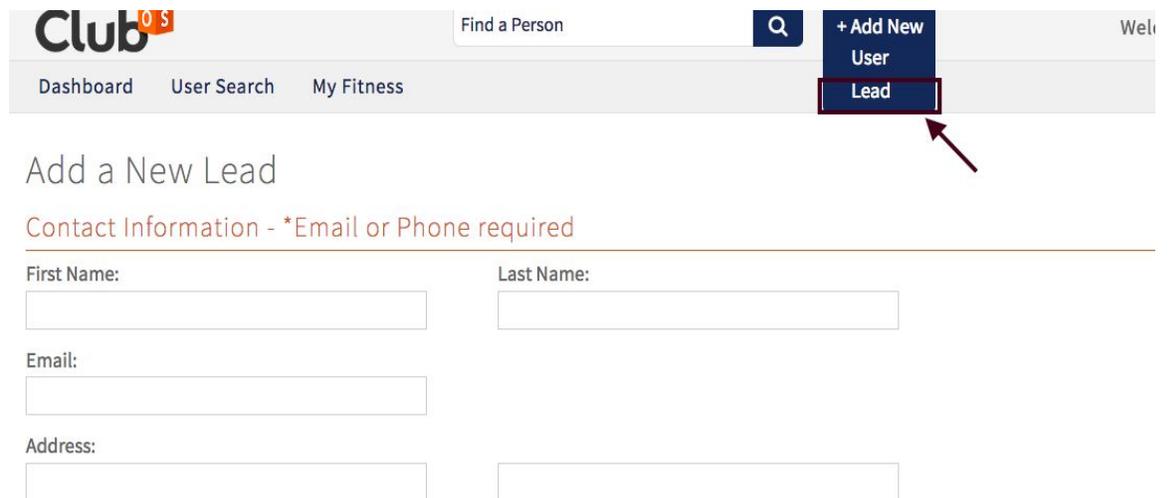
### 3.1. Adding a Lead through Club OS (Telephone Inquiry)

This is used for telephone inquiry customers. To add a new lead click on 'add new' and select 'lead' on top of the page. This will bring you to the 'add a new lead' information page.

The form is divided into six different sections. Each section captures different information about the lead. Following is a brief description of each section:

#### 3.1.1. Contact Information

This section will be used to record basic information about the prospect. Email or phone is a required field.



The screenshot shows the Club OS dashboard with a search bar and navigation links. The '+ Add New' dropdown menu is open, and the 'Lead' option is highlighted with a red box and an arrow. Below the navigation bar, the 'Add a New Lead' form is displayed, featuring a title and a subtitle indicating that email or phone is required. The form includes input fields for First Name, Last Name, Email, and Address.

Club OS

Find a Person

+ Add New  
User  
Lead

Dashboard User Search My Fitness

Wel

### Add a New Lead

Contact Information - \*Email or Phone required

First Name:

Last Name:

Email:

Address:

#### 3.1.2. Account Information

Important fields in this section:

- Club Location
- Follow-up with

- Time Zone
- Origin : Select 'TI' for telephone inquiry.
- Marketing Source: This refers to how the prospect first heard about the gym (eg-facebook, billboard, advertisement).

#### Account Information

---

Club Location: <input type="text" value="Test Club"/>	Origin: <input type="text" value="Choose..."/>
Follow-Up With: <input type="text" value="Austin Texas"/>	Marketing Source: <input type="text" value="Choose..."/>
Time Zone: <input type="text" value="Central"/>	

### 3.1.3. Personal Information

This section can be used to record the prospect's birthday and gender.

#### Personal Information

---

Gender: <input checked="" type="radio"/> Male <input type="radio"/> Female	Birthday: <input type="text" value="Month"/> <input type="text" value="Day"/> <input type="text" value="Year"/>
---	--

### 3.1.4. Guest Pass/Missed Guest

Utilize this section to issue the prospect a guest pass when they call in to inquire about your gym. If the prospect is not interested in the guest pass, then a reason can be marked.

## Guest Pass / Missed Guest

---

Start Date:

Length:

Reason

Barcode:

### 3.1.5. Notes

This section will enable you to record any important notes about the prospect. This information can be used to personalize your service when contacting the prospect at a later time.

Notes

---

### 3.1.6. More Options

In this section, you can add referrals and schedule an appointment upon saving. Both are useful features and explained below.

## More Options

---

Interests:

- Membership    Personal Training    PPV

Referred By:

- Search my location (Test Club) only*

Type Member's Name

Referrals:

Add Referrals

- Schedule an appointment upon saving
- Send New Prospect Response email if one is setup.

Create New Lead

### 3.1.6.1. Adding Referrals

When adding a lead, you have the option to add referrals. New referrals will display in the follow-up window. Referrals show in the 'follow up' window according to the settings on the follow-up scheme. You can adjust settings to display referrals immediately or after certain time has elapsed. This setting can be adjusted by club-admins only.

### More Options

Interests:

Membership    Personal Training    PPV

Referred By:

Search my location (Test Club) only

Type Member's Name

Referrals:

Add Referrals



click here

Schedule an appointment upon saving

Send New Prospect Response email if one is setup.

Create New Lead

© 2016 Club O

#### Add Referrals

Name #1	Email	Phone	Gender	Relationship	Notes
<input type="text"/>	<input type="text"/>	<input type="text"/>	Male	Choose...	<input type="text"/>
Name #2	Email	Phone	Gender	Relationship	Notes
<input type="text"/>	<input type="text"/>	<input type="text"/>	Male	Choose...	<input type="text"/>
Name #3	Email	Phone	Gender	Relationship	Notes
<input type="text"/>	<input type="text"/>	<input type="text"/>	Male	Choose...	<input type="text"/>
Name #4	Email	Phone	Gender	Relationship	Notes
<input type="text"/>	<input type="text"/>	<input type="text"/>	Male	Choose...	<input type="text"/>
Name #5	Email	Phone	Gender	Relationship	Notes
<input type="text"/>	<input type="text"/>	<input type="text"/>	Male	Choose...	<input type="text"/>

Cancel   Add Referrals

### 3.1.6.2. Scheduling an appointment upon saving

To schedule an appointment upon saving the lead form, click on the 'schedule an appointment upon saving' option on the form. Next, fill out information about who the appointment will be, duration etc. Once the form is saved, a calendar event will be created with the information filled out.

## More Options

---

**Interests:**

- Membership    Personal Training    PPV

**Referred By:**

- Search my location (Test Club) only*

Type Member's Name

**Referrals:**

[Add Referrals](#)

- Schedule an appointment upon saving 
- Send New Prospect Response email if one is setup.

**Create New Lead**

- Schedule an appointment upon saving

With:

Austin Texas

*If scheduling a Private Training or Semi-Private Training, select your trainer's name.*

Date:

Time:

Choose...

Event Type:

Appointment

Duration:

30 minutes

Remind Attendee:

30 mins before

Remind Owner:

30 mins before

- Send New Prospect Response email if one is setup.

When a lead is added to the system the following changes take place:

- After a lead is created, it becomes a prospect account within Club OS.
- The calendar will display an event for the lead. If the lead comes in at that time and fills out the DGW, the event will be marked as an 'appointment completed'. The event will be marked with a 'W' and 'completed' next to it indicating it was a walk-in event. If the lead does not show up then the status will be that of an 'Appt No Show'.  
**Note:** Scheduled events will only be marked as 'complete' once the DGW has been completed. To learn more about different statuses, click [here](#). To learn more about adding a lead, click [here](#).

PM	
12:00	12:00 (1)
12:30	12:30 (1)
1:00	 1:00 - 1:30 lucy F. [W] <i>Completed</i>
1:30	1:30 (1)

### 3.2. Adding a lead through the DGW (walk-ins)

This is a customizable form that all walk-in customers will fill out when they visit the gym for the first time. Your staff will need to display this form on a tablet and have it ready for incoming clients. It is advisable to bookmark this link so that it can be accessed quickly.

Benefits of filling out the DGW:

- Client's contact information is captured correctly.
- Data is accurately reflected in the KPI window . Information that will be reflected on the KPI window includes:
  - Information about who toured the club
  - Who closed the membership
  - # of walk-ins

- When clients fill out the form, they also sign the liability waiver for using the gym.
- Filling out the DGW creates a prospect account in Club OS and Club Hub.
- Filling out the DGW automatically creates a calendar event with a 'W' (indicating it was a walk-in) on the calendar. This indicates that a tour took place and KPIs are updated accordingly. If the customer fills out the DGW more than once (more than one visit to the gym), the status changes to 'B' . This indicates the customer is a 'be back' customer. This might happen if a customer didn't buy the membership on the first visit but then decided to tour the facility again.

Accessing the form:

The DGW form can be accessed under 'Account Settings'.

State:

Zip:

Country:

[Guest Waiver Link](https://forms.club-os.com/signup/anytime/1108)

<https://forms.club-os.com/signup/anytime/1108>

Sample DGW form:

## Thank you for visiting Test Club.

Toured By	<input type="text" value="Select an employee..."/>
First Name	<input type="text"/>
Last Name	<input type="text"/>
Address	<input type="text"/>
City	<input type="text"/>
State	<input type="text" value="Texas"/>
Zip	<input type="text"/>
Phone	<input type="text"/>
Email	<input type="text"/>
Emergency Contact	<input type="text"/>
Guest Of	<input type="text"/>
Source	<input type="text" value="How did you hear about us?"/>
Liability Waiver	<div><p>It is expressly agreed that all activities and use of all facilities shall be undertaken by guest at guest's sole risk. The athletic club shall not be liable for any claims, demands, injuries,</p><p><i>You must scroll to the bottom of the waiver to agree.</i></p><p><input type="checkbox"/> I agree to these Terms &amp; Conditions.</p></div>
Signature	<input type="text"/>

### 3.3. Web Leads

Web leads are prospects who have filled out the web lead form and have expressed interest in the club. The system automatically sends them a welcoming email and a 7 day guest pass upon submission of the form. Web leads appear in the follow-up window one day after the web inquiry is completed.

## 4. Scheduling Appointments

As an H2i, there are two kinds of appointments that you will need to schedule

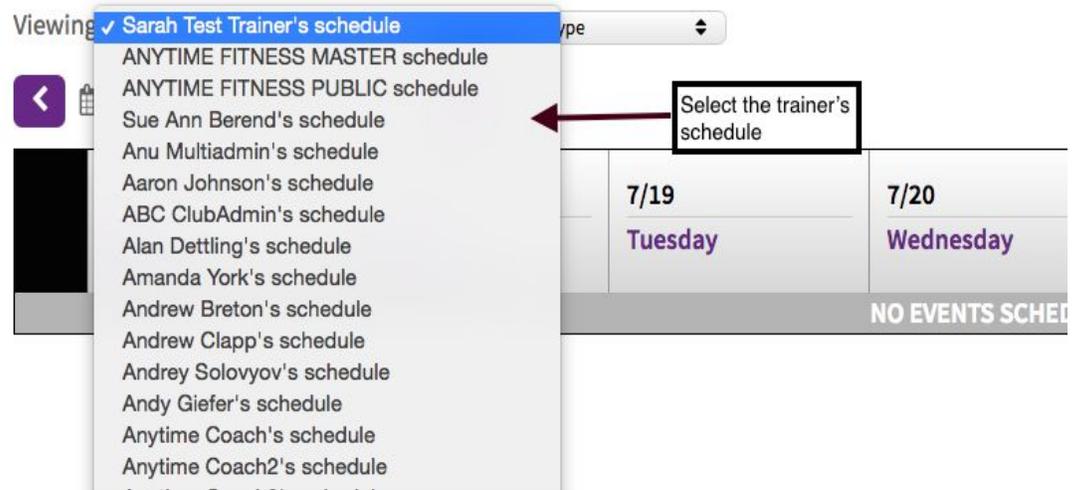
- a) FC appointments for trainers
- b) Club Tour appointments

Both of these are discussed below

### 1. Fitness Consultation Appointment:

If a membership is sold and a fitness consultation needs to be scheduled, as an H2i you have the ability to do that. To schedule a fitness consultation for the member, complete the following steps:

Navigate to the calendar ( *My Schedule* → *Calendar*). Select the trainer's schedule to view his/her availability before setting the appointment. Appointments with a red clipboard icon next to them would indicate that the trainer is willing to take fitness consultations at that time. Alternatively, you can select any other time slots that are open on the calendar for that specific trainer.



	1:00 (1)	
	1:30 (1)	
	2:00 (1)	
	2:30 (1)	
	3:00 (1)	
	 3:30 - 4:00 Fitness Consultation	
	4:00 (1)	
	4:30 (1)	

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.

8:30 (1)	8:30 (1)
9:00 (1)	9:00 (1)
9:30 - 10:00 Bettie T.	9:30 (1)
10:00 - 10:30 Fitness Consultation	10:00 (1)
10:30 (1)	10:30 (1)
11:00 (1)	
11:30 (1)	

click on an event

Add New Event
✕

Event Owner: ClubOS Demo

Event Type: Fitness Consultation

Assign Event Owner as Follow Up person of attendee

Location: Test Club

Subject:

Repeats

Start Date: 7/13/16

Status: Active

Remind Event Owner (15 minutes before)

Remind Attendees (2 days before)

Start time: 1:00 PM

End time: 2:00 PM

Notes:

Service: Select Service...

Email Notification:  Email All Attendees

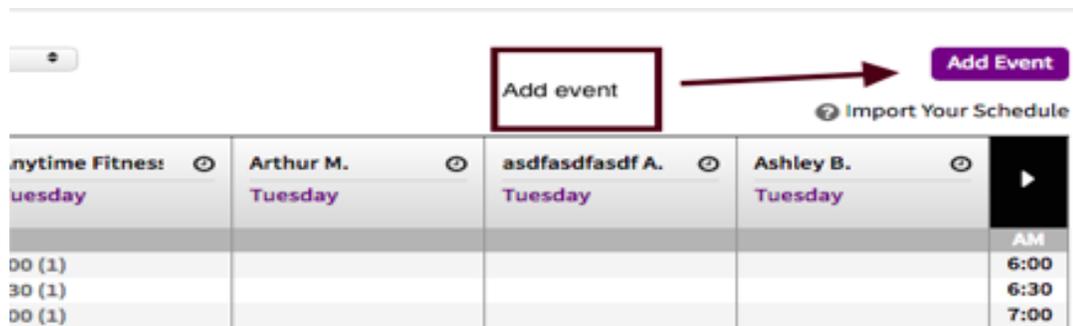
event type will be selected by default as FC

Default time duration as 1 hour

Close and discard changes
Save Event

b) Second Method:

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



- Event type: Select 'Fitness consultation' to schedule an FC session.
- Start Time/End time: Adjust this as needed
- Add Attendees: Always remember to add the attendee
- Service: 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.
- Remind Event Owner: Select this if you would like to be reminded about the event.
- Remind Attendees: Select this option if you would like to remind your attendees about the event.

Add New Event
✕

**Event Owner**

**Event Type**

Assign Event Owner as Follow Up person of attendee

**Location**

**Subject**

Repeats

**Start Date**   **Start time**

**End time**

**Status**  **Notes**

Remind Event Owner  before event

Remind Attendees  before event

**Add Attendees**

Search assigned members only Max #:

---

*1 attending*

**Member Clapp** ✕

▶

Email

**Service**

**Email Notification**  Email All Attendees

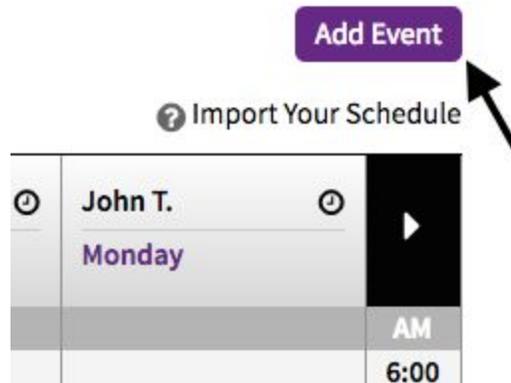
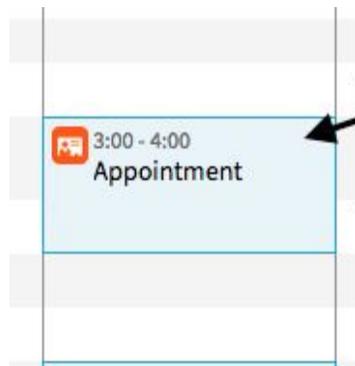
Close and discard changes
Save Event

## 2. Club Tour Appointments

Club tours can be scheduled as appointments using the Club OS calendar. This is specially useful in situations where a prospect calls and asks for an appointment to be scheduled to tour the facility again (having toured it earlier). You can set up an appointment for this prospect by selecting the prospect as an attendee (since the prospect is already in the system).

To add the appointment:

- Find an empty time slot on the calendar and click on it. Alternatively, you can click on the 'add event' window to open up the add event window.



Add New Event
✕

Event Owner:

Event Type:

Location:

Subject:

Repeats

Start Date:

Start time:  End time:

Status:  Notes:

Remind Event Owner  before event

Remind Attendees  before event

Add Attendees

Search assigned members only Max #:

Type Attendee's Name:

*0 attending*

Email Notification  Email All Attendees

Close and discard changes
Save Event

- Type in the prospect's name in the attendee's section to add the prospect.
- Fill out other fields as needed.

The second appointment will result in a status of a 'Be back'. This would indicate that the prospect returned to the location for a tour. A be back is marked on the calendar by the letters 'B'.

2:30 (1)	2:30 (1)	2:30
3:00 (1)	3:00 (1)	3:00
3:45 - 4:15 lucy F. [W] <i>Completed</i>	3:30 - 4:00 lucy F. [B]	3:30
4:30 (1)	4:00 (1)	4:00
5:00 (1)	4:30 (1)	4:30
5:00 (1)	5:00 (1)	5:00

#### 4.1. Marking FC as confirmed

It is recommended to mark an FC as confirmed after confirming the appointment by calling/emailing the client. Confirming the appointment will help increase your appointment show ratio. 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 Club <i>Confirmed</i>	 10:30 (1) Test Club
	 11:00 (1) Test Club
11:30 (1)	 11:30 (1) Test Club

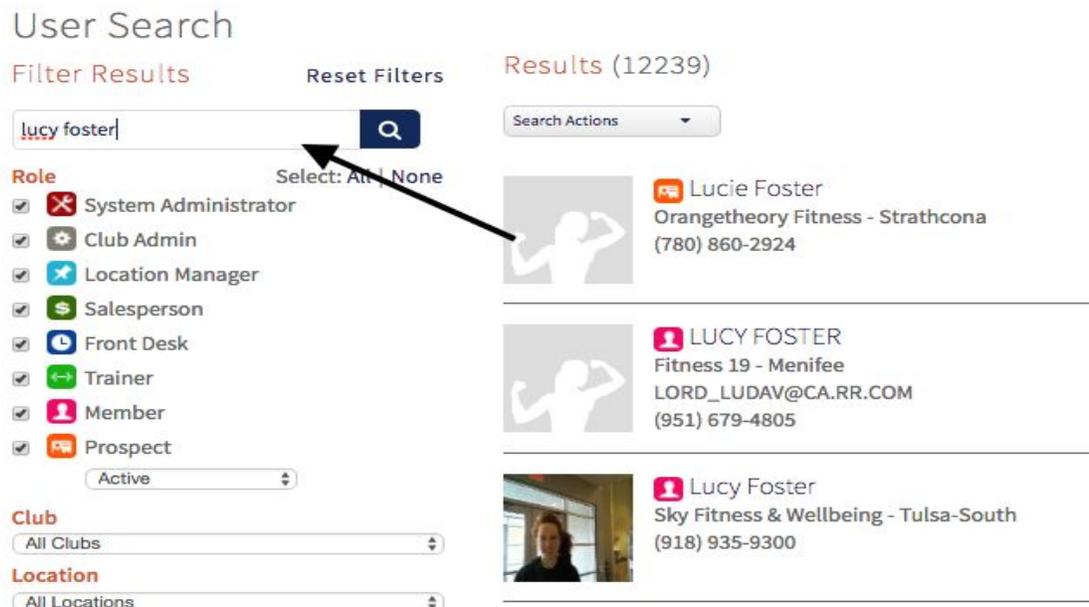
## 4.2. Selling PT package at point of sale

To sell a PT package, the prospect has to first convert to a member by buying membership. To learn more about selling PT packages, please join the PT management webinar.

## 5. User Search Actions & Note Capturing

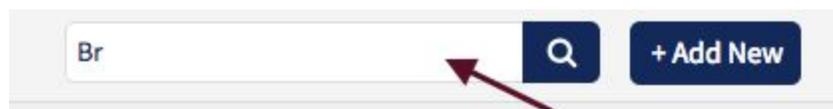
### 5.1. Accessing User Search

The user search tab within Club OS allows you to search for a prospect or member profile. To begin search, write the name, email address or phone number of the member/prospect in the search field.



The screenshot shows the 'User Search' interface. On the left, there are filter options for 'Role' (System Administrator, Club Admin, Location Manager, Salesperson, Front Desk, Trainer, Member, Prospect) and 'Club' (All Clubs). The search bar contains the text 'lucy foster' and a search button. A red arrow points to the search button. The results section shows three profiles for 'Lucie Foster' at different locations: Orangetheory Fitness - Strathcona, Fitness 19 - Menifee, and Sky Fitness & Wellbeing - Tulsa-South.

Alternatively, you can search for the member/prospect profile by using the search tab at the top of the home page.



After locating the prospect/member's profile, click on it to access it.

## 5.2. Deleting/undeleting prospects/members

- To delete/undelete prospects/members, navigate to user search and set the filters correctly.
- Confirm the delete/undelete action
- Wait for the confirmation email and notification

To learn more, please click [here](#).

## 5.3. Lead Notes

Club OS makes it possible for you to offer great customer service to your prospects and members by allowing you to record useful information easily.

To add notes, navigate to the member/prospect's profile and then click on Prospecting→ General. Scroll down to the bottom of the page to access the notes section.

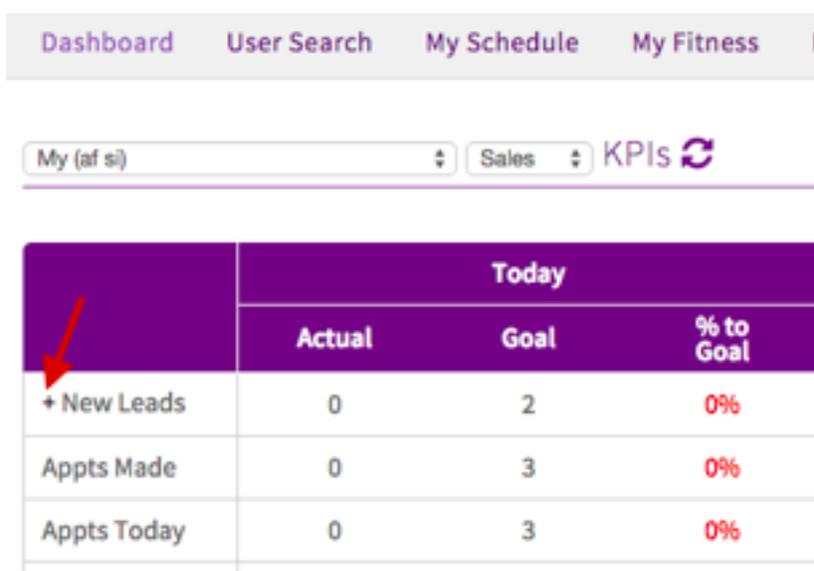
The screenshot displays the Club OS interface for a prospect named Lucy L. The top navigation bar includes 'Dashboard', 'Prospecting', 'Member Schedule', 'Member Fitness', and 'Club Info'. The main content area is titled 'Prospecting' and shows 'Lucy L's Prospect Details' with a creation date of 'August 26, 2015 @ 6:18 AM'. The 'General' tab is selected, and the 'Origin' is set to 'Walk-in' and 'Marketing Source' is 'Friend'. Other fields include 'Takeover Person', 'Interests' (Membership, Personal Training, PPV), 'Referred By', and 'Referrals'. A 'Save Details' button is visible. Below this, there are sections for 'Release of Liability Waiver' and 'Guest Pass / Missed Guest'. At the bottom, the 'Lead Notes' section is highlighted with a black arrow, showing a note from the system dated 1/2/01 @ 06:00 PM.

Lead notes sync to Club Hub and will provide you with valuable information. They also appear in the follow-up window to allow you to personalize follow-ups as needed. To learn more about how to add notes, click [here](#).

## 6. KPIs and Follow-ups

### 6.1. KPIs (Key Performance Indicators)

The KPI window has been designed to give you an oversight of your performance in relation to the goals that have been set for you. It gives you a visual real-time representation of your performance.



The screenshot shows a navigation bar with 'Dashboard', 'User Search', 'My Schedule', and 'My Fitness'. Below it is a dropdown menu for 'My (af si)' and a 'Sales' dropdown. The main content is a table titled 'KPIs' with a refresh icon. The table has a header row for 'Today' with sub-headers 'Actual', 'Goal', and '% to Goal'. The data rows are:

	Today		
	Actual	Goal	% to Goal
+ New Leads	0	2	0%
Appts Made	0	3	0%
Appts Today	0	3	0%

### 6.2. Follow-ups

The follow-up window displays information about prospects (orange icon) and members (pink icon) that need to be contacted for follow-ups. Follow-ups are not sent automatically and need to be completed manually. When an employee comes to work, this follow-up window will provide a list of individuals that need to be contacted for follow-ups by that employee.

Follow-Ups **0** Overdue **16** Sort

Austin, TX (BWZ) All Membership

	<b>Suzy Member</b> Missed Guest (M) Follow-Up: 7/2/16 w/ Sally S.	<b>Follow-Up</b>
	<b>Justin Thyme</b> Member (M) Follow-Up: 7/1/16 w/ Club O.	<b>Follow-Up</b>
	<b>Anita Trainer</b> Referral (M) Follow-Up: 6/30/16 w/ Sally S.	<b>Follow-Up</b>
	<b>Gina Smith</b> Member (M) Follow-Up: 6/30/16 w/ Sally S.	<b>Follow-Up</b>

To learn more about follow-ups, please join the maximizing follow-up webinar.