

10 THINGS TO KNOW

Before Buying Software to Run Your Affiliate



BETTER SOFTWARE FOR YOUR FITNESS PASSION

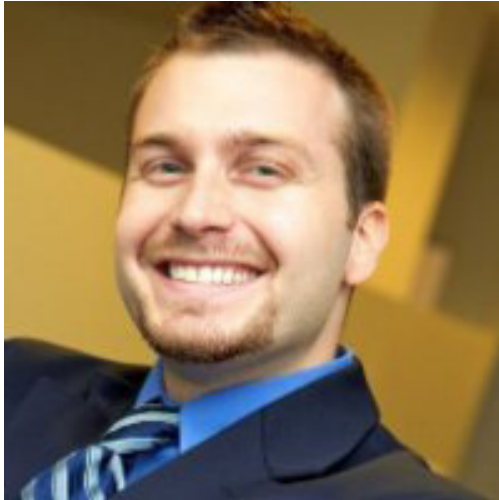
10 Things to Know Before Buying Software to Run Your Affiliate

Congratulations! You had a dream and you worked hard, took chances, and made sacrifices. Now you're seeing the fruits of your labor. Things are going well and you're helping your athletes reach their goals. But why do you feel that you could share your love of CrossFit with more people if you only had the time?

Every successful affiliate owner reaches a point where affiliate management software is the solution to maintaining sanity and enjoyment in the business. Fortunately, selecting and adopting a software solution doesn't need to be overwhelming. We can help guide you in your selection process.

Is It Time for Software?

We've surveyed thousands of affiliate owners to determine the point at which they felt they needed software to manage their box. About half of those surveyed decided they needed business software prior to opening their doors. The remainder decided to search for software once they had about twenty-five active members. When affiliates get to about twenty-five active members, collecting payments manually and tracking attendance in spreadsheets becomes overwhelming.



Crossfit Park Ave.

Before he opened his box, Dario Delkic, owner of CrossFit Park Ave, knew that all the aspects of managing a business would be time consuming. He sensed that he would need a full-time employee or some resource to help him manage the business. His schedule of classes had to be updated daily, member attendance tracked, invoices and payments recorded and members notified of their expired credit cards or past-due invoices. Member account information also had to be kept in one location, separate from prospects and current or new members. With all of these requirements, Dario doubted that he could manage the administrative part of the business with spreadsheets alone.

Dario began to talk to other affiliate owners about these challenges and the software solutions they used to run their business. Nearly all of these owners suggested Dario look at Zen Planner. These owners described to Dario the success they had with Zen Planner's all-in-one software and provided him with specific examples of data management, and ease of use.

"It was very clear to me after speaking with other CrossFit owners that you have to have Zen Planner to run your box. I felt confident that Zen Planner would handle the invoices, payments, attendance, alerts, data capture and more."

Today, CrossFit Park Avenue adds new members each month and attributes that to Zen Planner. Zen Planner also saves CrossFit Park Avenue from having to hire an extra person for administrative work. This is a combined net value to CrossFit Park Avenue of nearly \$50,000 per year.

We consistently hear stories just like that one. Box owners save an average of ten hours a week once they implement a software solution. If you bill for your services at \$25 per hour, the very low-end for fitness trainers, you can reasonably expect a gain in revenue of about \$1,000 per month. Almost all the affiliate owners we surveyed say that they actually undercharged prior to using software because it was impossible to maintain accurate attendance records. That would explain in part why affiliates that use software grow at a rate of 88% annually, while those who don't grow at only 2.3% annually. (Technology Institute, 2014)

In addition to saving money and time, many affiliate owners decide they need a software solution to stay competitive. 57% of affiliates use some sort of scheduling software and 36% of those who don't intend to purchase it in the next 2 years. Those who don't adopt a software solution could be left at a competitive disadvantage. (Technology Institute, 2014)

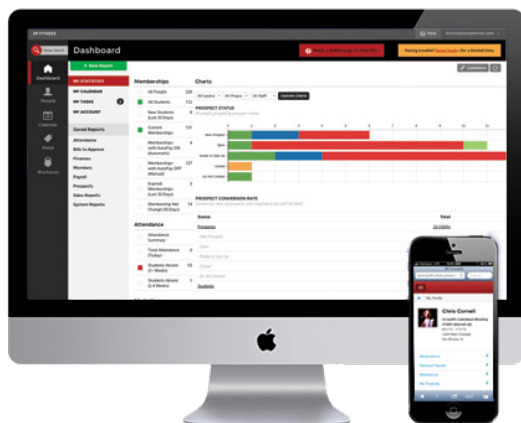
Once you've decided it's time to evaluate a software solution, there are ten critical things you need to know in order for you to select the right solution. These questions will help you choose software that will allow you to spend less time on the administrative tasks and more time doing the things that matter most. You will also be able to better serve the members you have, while growing your membership base. Everything you need to know to select a software solution is contained in this e-book.

1 How easy is it to use?

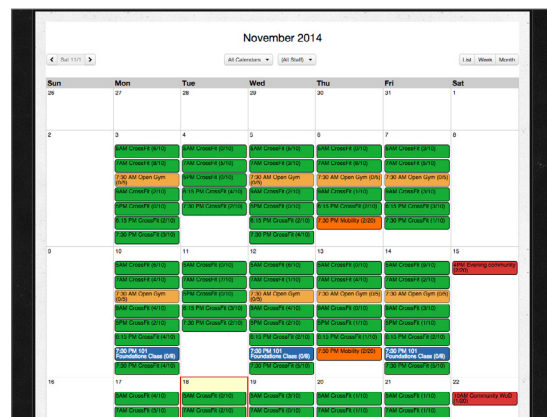
"Zen Planner saves me time, it saves me money, and it's so easy to use."

—Andy Petranic, CrossFit LA

Adopting a new software solution can be a daunting task. It's important to find a solution that is easy to learn and use. You and your team should be able to transition to your new software in a matter of hours or days and you should be able to instantly see the positive impact. For your members, ease of use is absolutely critical. Upon implementation, they should be able to intuitively perform the basics like reserving a class and paying for membership. Then, as your members begin to learn how to utilize the additional features, they should clearly be able to see that the software provides better usability than anything they used before. Features should be accessible and convenient to use on all devices, including an iPad, laptop, desktop or a mobile device.



Your team should be able to use your new software on multiple devices so that they can better serve your members.



Your members should be able to intuitively use your new software to sign up for a class and pay for their membership. Here you can see the simplicity of reserving a class with Zen Planner.

2 Can I use automate payment processing?

“With Zen Planner’s integrated payment processing, we automatically collect payments from our customers and we receive alerts if a customer’s credit card no longer works. I don’t have to chase my customers in order to get paid and I can just focus on improving my clients’ health and fitness.”

—John Hallett, Rocky Mountain Self Defense & CrossFit

Your software solution absolutely must make it easy for your students to pay you. Simply put, if it’s not easy for them to do so they may cancel their membership, maybe even moving to another gym. If payments are automatic, the monthly decision point doesn’t exist. But if a student needs to swipe their card at your counter each month, they will unintentionally re-evaluate the benefits gained by the cost of their membership each and every time they hand you their credit card.

A recent study by Fiserv found that there is an average of 15% less churn when a customer utilizes automatic payments with electronic billing. For a box with fifty clients and an average bill of \$100 monthly, that amounts to \$750 in month revenue with automatic payments. (Aspen Marketing Services, 2010)

While you may need a payment processing option, you also likely can’t afford to spend a lot in getting a system in place. You need a payment processing option that is affordable. Some solutions are more expensive than others, especially with processing fees. Studies show that once you have more than fifteen members, a payment processor like PayPal is no longer the best choice as it becomes cost prohibitive. Instead, you need a solution that will handle your business growth in a way that makes sense.

3 Can I automate email?

“Zen Planner lets us keep in touch with our members on a regular basis, which improves member retention.”

—Steve Hartle, Backcountry CrossFit

A good software solution will make it easy for you to automate your daily business emails. This eliminates the need for you to sort through endless spreadsheets and take desperate measures to convey important messages to your athletes. Email automations should be integrated with your system so that they can be easily driven by all of the important member information you already have for your clients. For instance, automations will remind your athletes when they need to pay their membership dues, encourage your members to take a new class or try a new program, and direct your team to reach out to athletes who need a little extra attention.

Email automations also help you with your ever-important marketing needs. With fitness businesses popping up on each and every city block, affiliate owners need to stay ahead of the pack with great marketing strategies. By using email automations, you can effortlessly reach out to athletes who failed to join your affiliate after signing up for a trial membership. You can also use automations to maintain contact with members who left your box or needed to freeze their membership. You can also capture prospect information by allowing your web visitors to “request more information.”

Quick Tip: Automated Marketing and Member Nurturing You Can Use

Problem: An athlete hasn’t checked in during the last two weeks.

Solution: Automate an email that tells them that you miss them.

Problem: You’re looking for ways to tell your athletes they matter to you.

Solution: Automatically send an email that wishes them happy birthday or celebrates their membership anniversary.

Problem: You’re always looking for ways to encourage or applaud your athletes.

Solution: Congratulate the athlete via email and note improvements in body composition, performance and/or continued attendance.

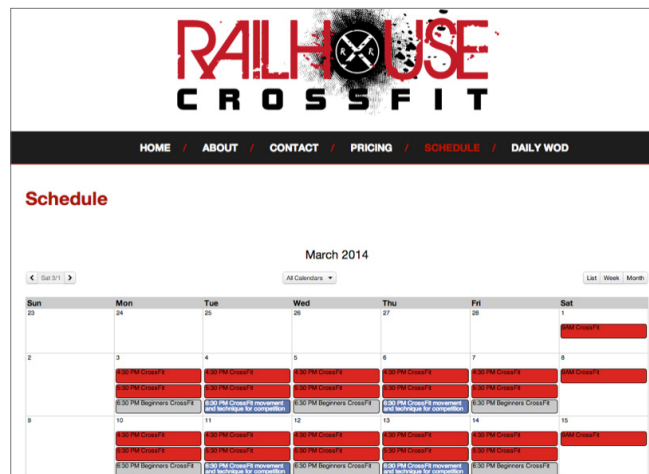
4 Can it integrate with my website?

“Zen Planner smoothly integrates our schedule with our website, which is important. The fewer issues clients have doing things like making reservations the less time you have to spend answering questions and emails. This means I can focus on programming and coaching instead.”

—Simon Damborg, CrossFit Pacific Central

A great software solution should provide basic website tools and functionality so your members can interact with you via the website you’ve already built. This allows you to enhance your website with key tools and features like calendars and prospect forms. Adding these features saves you administrative time and enhances the experience for your members.

When evaluating fitness business software, you should expect this functionality and should not be required to pay extra for it.



Zen Planner's calendar is integrated into Railhouse CrossFit's website. By clicking into a specific class, a student has the opportunity to log in or sign up for a new membership.

5 Can I easily get a snapshot of my business?

"Zen Planner has not only allowed us to make more money but to better understand where that money is coming from."

—Tim Thackery, CrossFit High Voltage

Relying on spreadsheets to track all your important business and athlete information can become overwhelming fast. You need to easily run reports and perform functions that you simply can't do using spreadsheets as your business platform. Reports that allow you to analyze your membership base, monitor member attendance, and track referral sources all take you to the next level and help you achieve so much more than you could without a software solution.

Quick Tip: Metrics You Need to Know

Financial

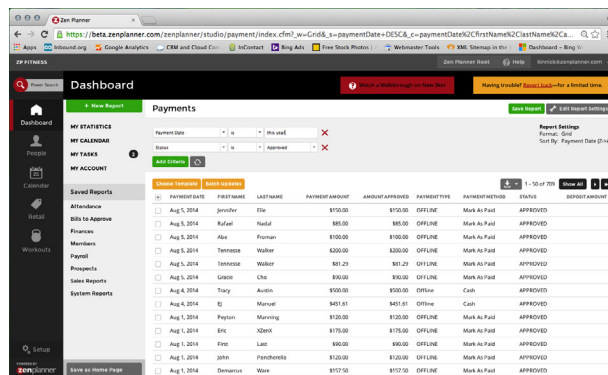
- Revenue
- Revenue per client
- Past due payments

Membership

- Conversion (from initial visit through to paying member)
- Customer trends
- Prospect status
- Retention

Attendance

- Past attendance
- Missed classes



MEMBER NAME	PAYMENT AMOUNT	AMOUNT RECEIVED	PAYMENT TYPE	PAYMENT STATUS
Aug 1, 2014 Jennifer Ely	\$150.00	\$150.00	OFFLINE	Mark As Paid APPROVED
Aug 1, 2014 Rafael Nodal	\$85.00	\$85.00	OFFLINE	Mark As Paid APPROVED
Aug 1, 2014 Alex Freeman	\$100.00	\$100.00	OFFLINE	Mark As Paid APPROVED
Aug 1, 2014 Tennessee Walker	\$200.00	\$200.00	OFFLINE	Mark As Paid APPROVED
Aug 1, 2014 Tennessee Walker	\$81.25	\$81.25	OFFLINE	Mark As Paid APPROVED
Aug 1, 2014 Gracie Cho	\$50.00	\$50.00	OFFLINE	Mark As Paid APPROVED
Aug 1, 2014 Tracy Austin	\$50.00	\$50.00	OFFLINE	Cash APPROVED
Aug 1, 2014 KJ Manual	\$451.61	\$451.61	OFFLINE	Cash APPROVED
Aug 1, 2014 Payton Manning	\$120.00	\$120.00	OFFLINE	Mark As Paid APPROVED
Aug 1, 2014 Eric Kdenk	\$175.00	\$175.00	OFFLINE	Mark As Paid APPROVED
Aug 1, 2014 Eric Last	\$80.00	\$80.00	OFFLINE	Mark As Paid APPROVED
Aug 1, 2014 John Parthenitis	\$120.00	\$120.00	OFFLINE	Mark As Paid APPROVED
Aug 1, 2014 Benjamin Wade	\$157.50	\$157.50	OFFLINE	Mark As Paid APPROVED

With easy to run reports like this profit and loss statement, Zen Planner makes it simple for you monitor your business performance.

6 Is there workout tracking?

“We use Zen Planner to track individual athlete performance so we can see changes over time.”

—Skip Morrison, Front Range CrossFit

Whether it's functional movement, strength, or metabolic conditioning, you're providing coaching needed for your members to achieve their fitness goals. You should have a software system that supports your athletes' efforts with workout tracking. You'll want the ability to create custom WODs for tracking each client's progress toward their goals. Your members should be able to easily record their successes and see their growth over time. You should also have a system that lets you decide on how to use it. Whether it is on an iPad or a big screen, any setup and related configuration should your decision.

Quick Tip: Things to Look for In Workout Tracking

- Are there comprehensive programming abilities?
 - Does it have basic workout definitions?
 - Can you share your workout results?
 - Can you view past performance?
- Is there a white board-like workout display?
 - Can you log results in the gym?
 - Can you log results via mobile?
- Is there a leaderboard that shows results?
 - Can you share results online?
- Can you use your own equipment?
 - Are there set up fees?

Workout tracking software is not created equally. Be sure you know which features you want before you start doing demos. That way, you'll be sure to make the right decision for your box.

7 How easy is it for my members to use?

“Zen Planner is so easy to use. Everyone who uses our system tells us that they find it super intuitive.”

—Dario Delkic, CrossFit Park Ave.

Your athletes expect a certain level of self-service when it comes to scheduling classes and buying memberships. Ideally, they should be able to go online, see your schedule and determine on a day-to-day basis which of your classes best fits their needs. Athletes also want to sign up for special workshops and programs online, so affiliate owners need to be sure all these things are easy to do. For that reason, ease of use for your athletes is a top priority. If a system is too complex or difficult to navigate, members will become frustrated and eventually give up using the software or even evaluate a move to another gym.

8 What types of alerts or automations are available?

“Zen Planner’s automations have allowed us to retain customers we otherwise would have lost.”

—Jenny Jaeger, Rocky Mountain CrossFit

An alert is a notification that something is not working correctly or an action needs to be taken. This is much the same as getting a notification on your iPhone telling you that you have a meeting in 5 minutes. Alerts allow you to stay focused on what is important for your business.

One way you can use alerts is when you are handling payments. Ideally, you’ll automate all your member’s payments, but an alert would be beneficial if a payment doesn’t go through correctly. Additionally, if someone has a membership that is expiring in the next month, you may want to be “alerted” so that you can proactively show that student how much improvement they have made over a specific period of time. You can then inspire them to renew their membership and begin setting new goals. This type of tool keeps you proactively in front of your business rather than reacting after something goes off track.

You can also use system alerts to communicate with your staff. For instance, if you have a new prospect coming in, you can let the team know about specific needs or concerns to look out for when caring for that student. Likewise, if payroll is due to be processed, you can remind your team to enter hours worked or the number of classes taught.

9 Can I use it to manage events?

"Zen Planner is our central hub for everything that happens in our business."

—Tim Thackery, CrossFit High Voltage

Events can bring in new students and direct revenue, while building the feeling of community in your box. As you evaluate a software system, make sure it has the capability to simplify your event management. Great solutions will allow your students to schedule and pay for events on your website. You should also be able to limit registration to a particular student group or make the attendance fee variable for members and non-members. Finally, any event management feature should provide an accurate attendance list so you can set up automated emails before and after the event.

10 What support is available?

"Their informative support team helps us get things done quickly and effectively."

—Matt Hathcock, CrossFit Unbroken

We all know the positive impact good service makes. Especially when the customer service you deliver completely relies on the support and service you receive from one of your vendors. A worst-case scenario can ultimately mean the loss of business for you. Conversely, knowing you can reach a team of dedicated and knowledgeable people, who genuinely care about your business, makes a world of difference. Ask any potential software provider questions like:

- How many customer references do you have?
- Do you have passionate customer advocates who are willing to publicly talk about their experience?
- What is your customer satisfaction rate?
- How often do customers refer other customers to you?

These questions are easy to overlook but will save you headaches later on.

Summary

Making the decision to adopt an affiliate software solution can be one of the best decisions you will ever make for the long-term health and success of your business. Making sure to select a solution that is right for you and your members is key to your success. An easy way to begin this process is by considering the critical features you'll need to manage and grow your business, as outlined in this e-book. If you want additional advice or information, reach out to one of our knowledgeable software sales specialists. Our team is made up of passionate CrossFit enthusiasts who understand what it takes for you to grow your business.

About Zen Planner

Zen Planner's all-in-one software gives you everything you need to turn your passion into a successful business. With integrated payment processing, scheduling, membership management, workout tracking, email and website templates, you have everything required to develop and grow the fitness community you worked so hard to create.

Not only does Zen Planner provide you with tools that enable you to grow, nurture and retain your members, it is remarkably easy to use. While some software providers require paid training over weeks and months, Zen Planner makes it easy to get up and running. Every customer gets three free sessions with a personal coach, so you can take advantage of Zen Planner's rich features right from the start.

Zen Planner is backed by a team of like-minded fitness fanatics. Our team is made up of affiliate gym competitors, yoga instructors, black belts, dancers and gym owners. When you do need help, we combine our software know-how with our expertise in your community to help you and your business thrive. Our passion for fitness and your success is apparent in our consistently high customer satisfaction score of 99%. And one out of every two customers refers another happy customer to us.

For more information on how Zen Planner can help you better manage your business, visit us on the web at zenplanner.com or give us a call toll-free at 866-541-3570. You can also sign up for a free trial at zenplanner.com/try-now

Sources:

Aspen Marketing Services (2010) Research Study on the Impact of Bill Presentment and Payment on Retention and Profitability for Qwest Communications.

Technology Institute (2014) PwC Global 100 Software Leaders. The growing importance of apps and services.