

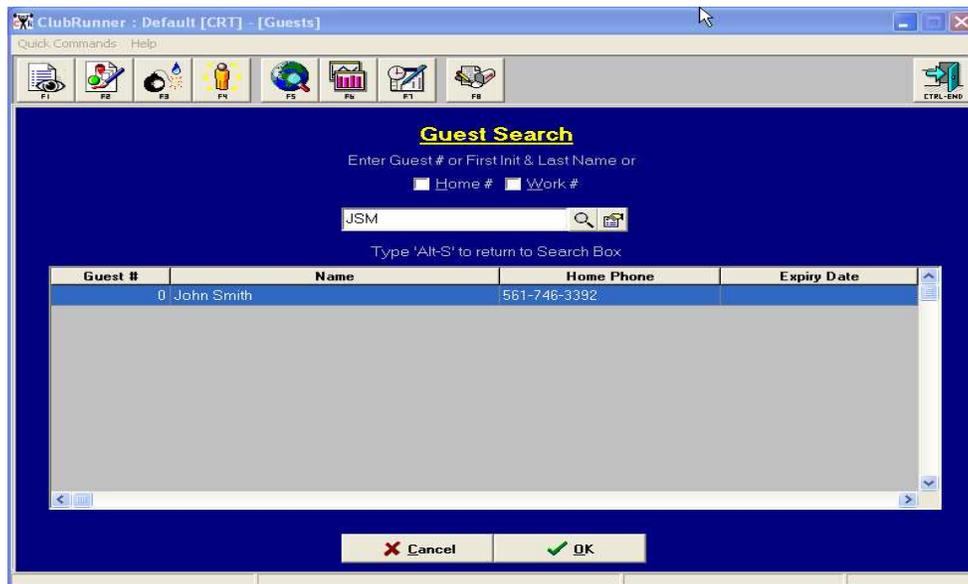
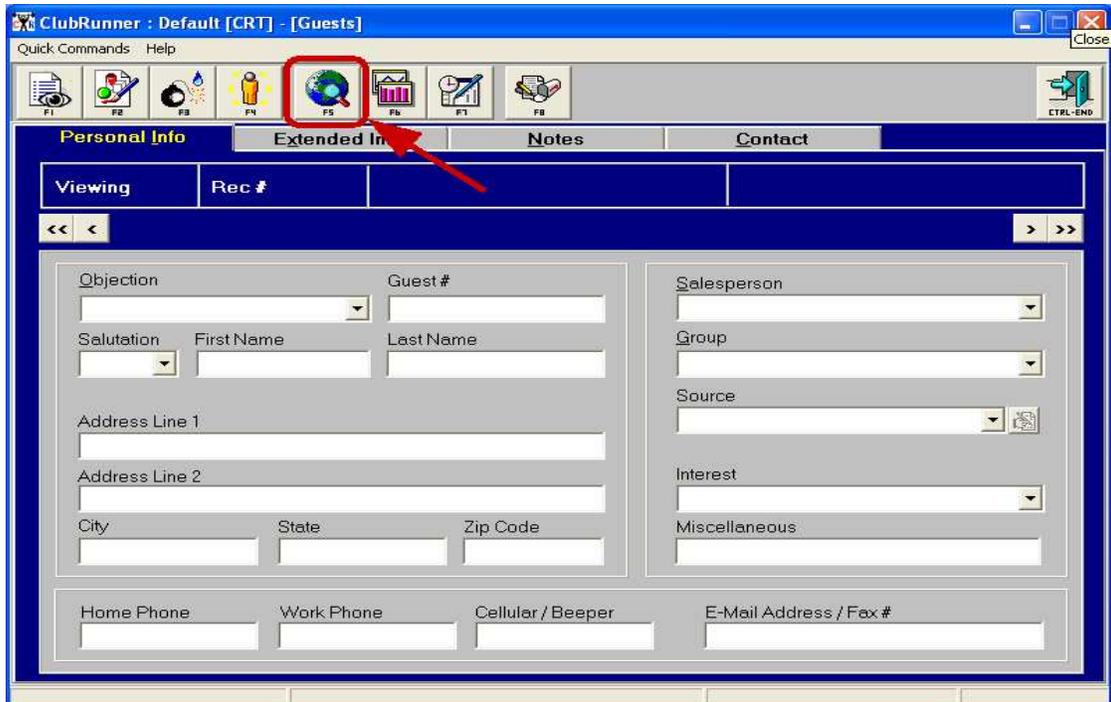
Contact Manager

ClubRunner's Contact Manager is a very powerful tool used to solicit Guests and maintain Members. It is perhaps the most underutilized, powerful tool in the ClubRunner software system. It can either be used as a general follow up for Guests or Members, or, a very specific “targeting” of them. Let's start by showing you a quick overview of how it can be used with Guests. Then we'll show you an example with Members. Finally, you'll learn how to set it all up and “tweak” it.

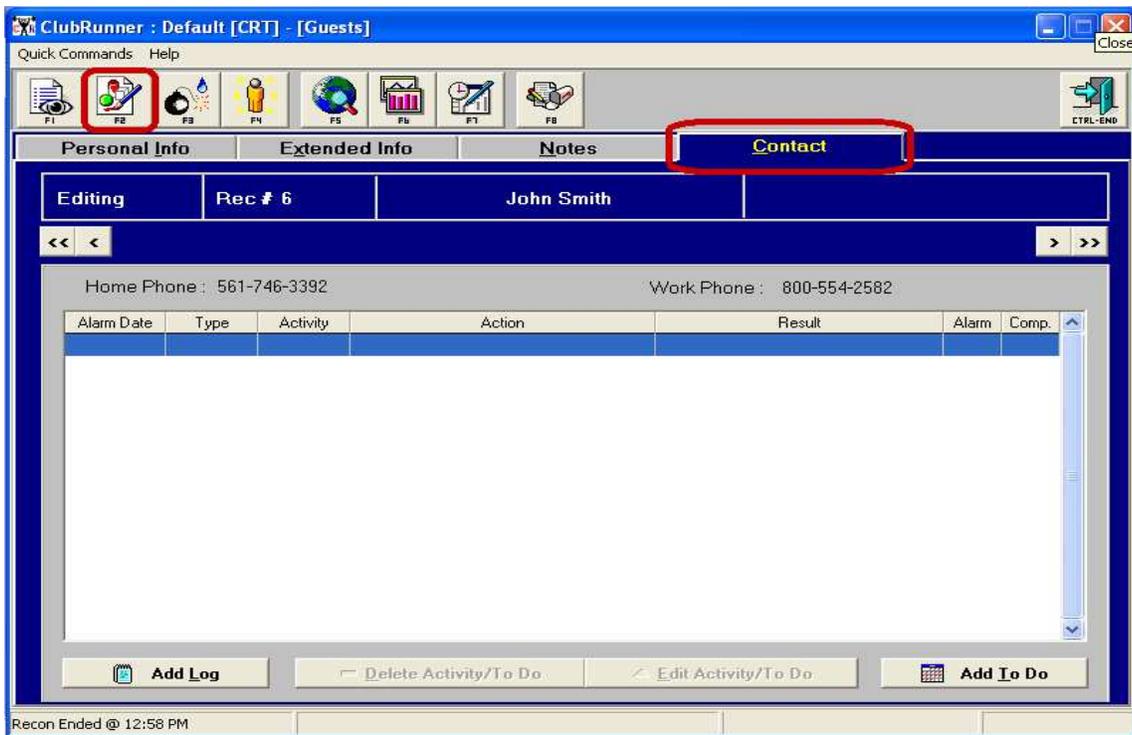
Guests Example...



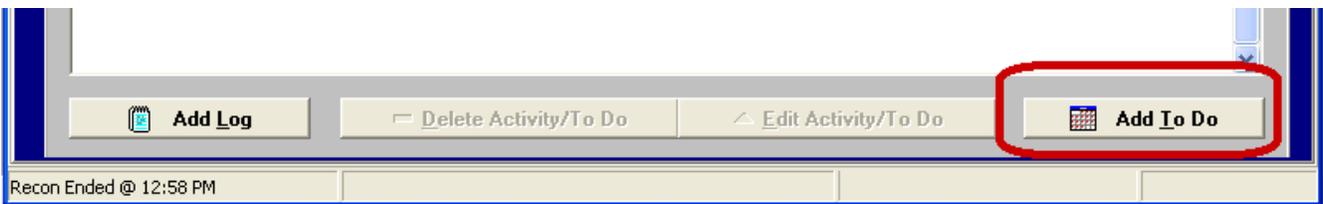
Enter in to the Guest Module, where we'll set up some “contacts” with Guests. Once in there , search on the Guest that you want to “contact”...



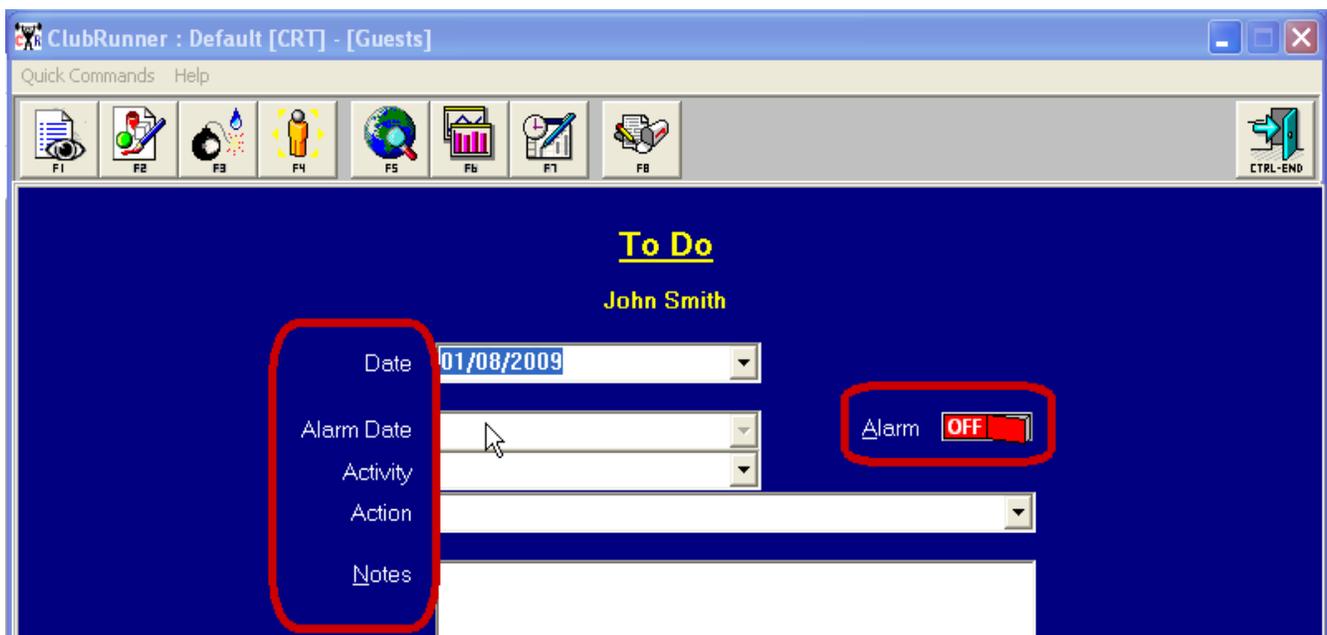
After selecting the guest, go in to the “Edit” mode (F2) button and click on to the “Contact” tab...



Now you can set up a schedule of contacts. This is the “simplest” form of the contact manager. For example, we want to contact this guest and offer them a free 2 week pass, as long as they let us give them a tour of the club...We would add a “To Do” as follows...



Filling in the the “To Do” screen...

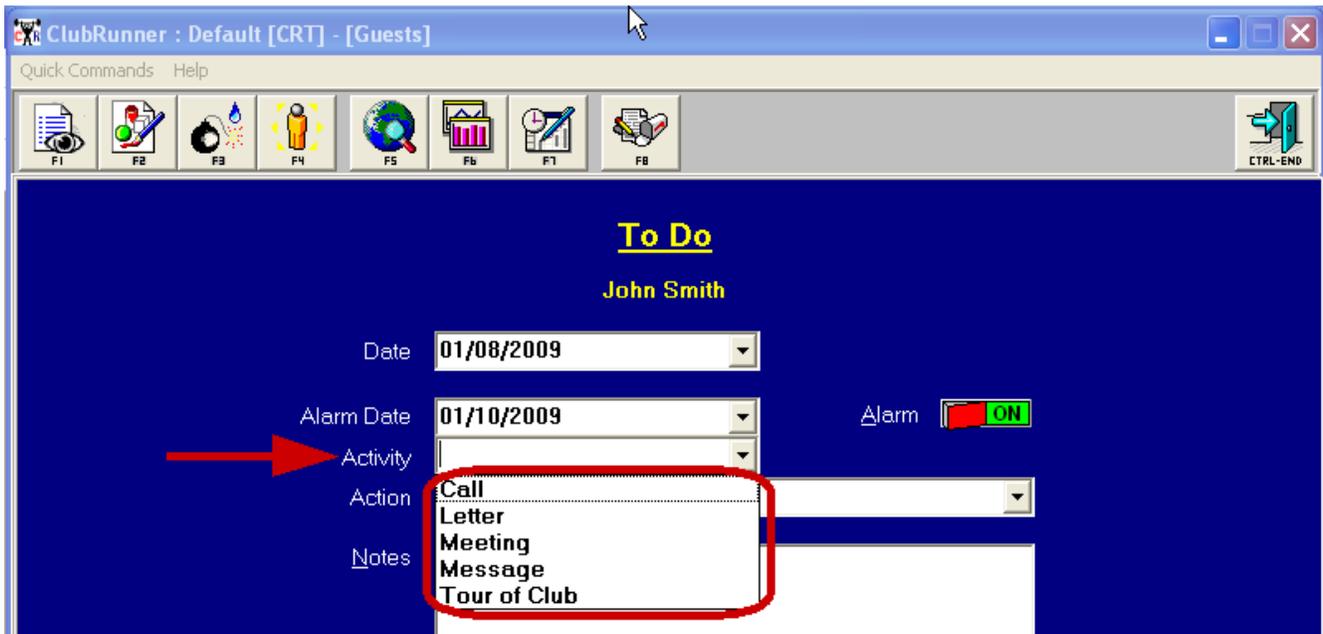


Date: The default is today's date, which is the date that you are creating this contact. However, this date can be changed to reflect the actual date that this action occurred.

Alarm Date: This is when you want to be reminded to take whatever the “Action” is. When an employee enters the “Guest” or “Member” module with their password, ClubRunner knows who they are. ClubRunner checks any Guest or Member contacts (depending upon which module you entered) that the employee may have for that day or any previous days that does not have a “Result” entered. In other words, these are “unresolved” contacts and *the employee will be alarmed until the contacts are completed with a “result”*. **Note that the “Alarm” button must be turned ON!**



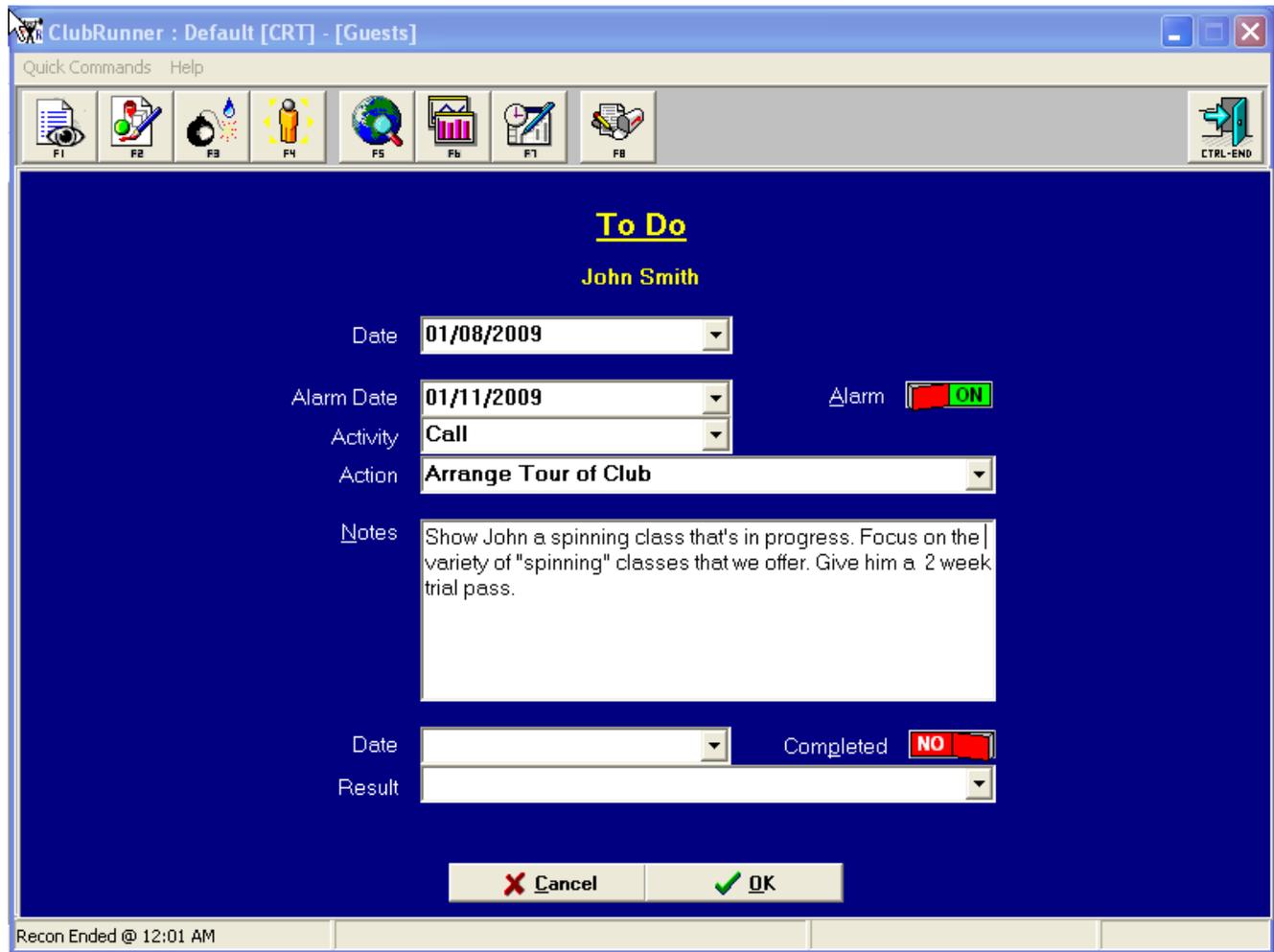
Activity: This drop down window is where you choose the “Activity” that you want to do on the “Alarm date”. The drop down window list can be edited and changed by you in the “Utilities” section of ClubRunner (more about that later on).



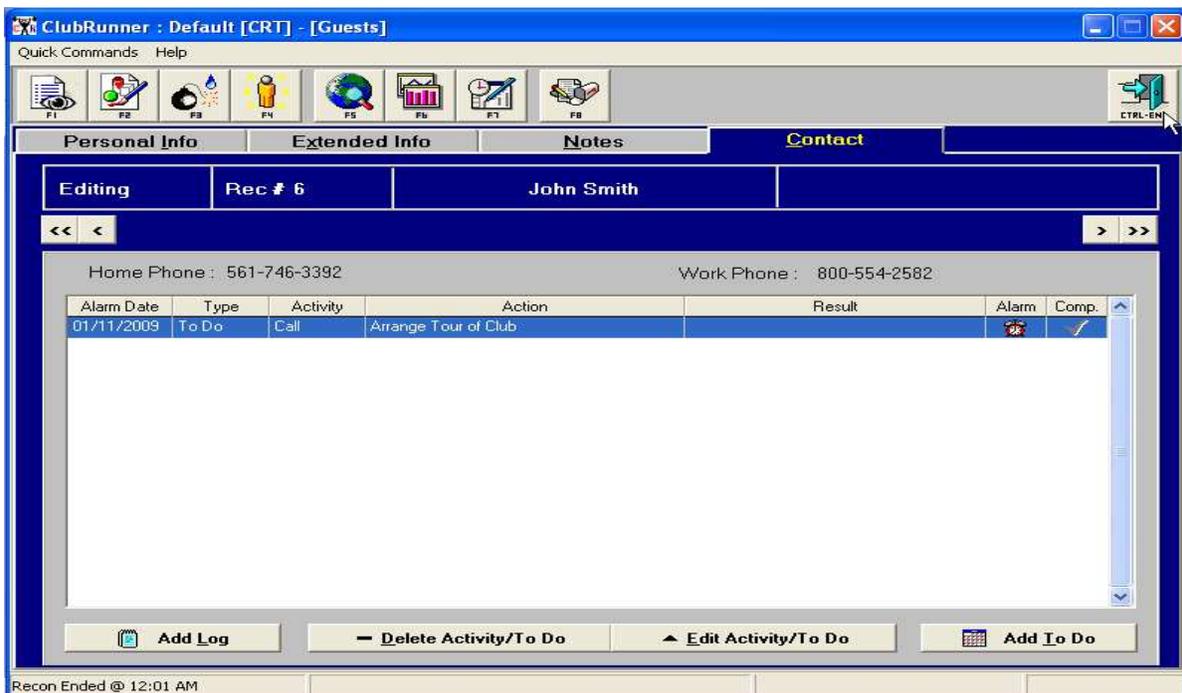
We'll pick “Call” as our “Activity”, and then proceed to set the “Action” of the “Call”...



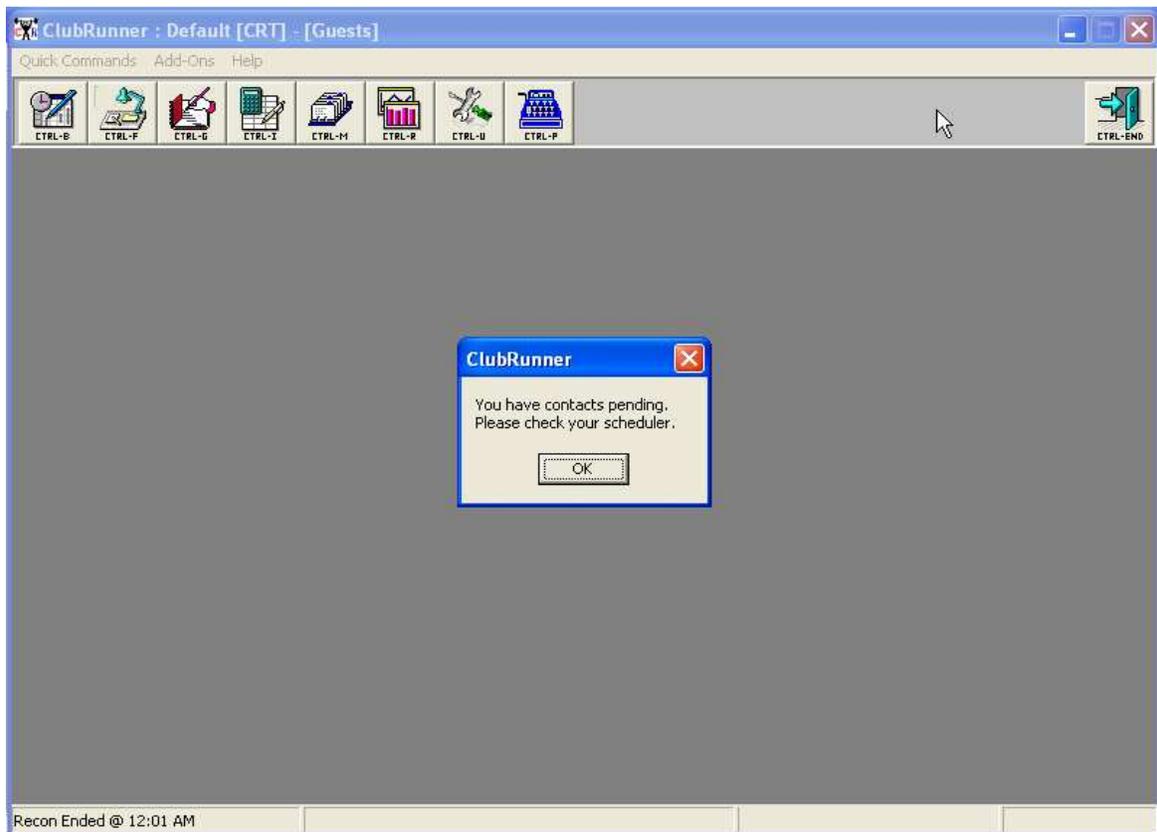
We also know that John is interested in our spinning classes, which we'll add to our notes and the "To Do" section would look like this...



After clicking "OK", my "Contact" tab would look like...



All done! I'll just sit back and let ClubRunner do my job! Everytime time I enter the Guest module (on or after January 11th, the alarm date), I'll see the message...



This is the “hard” part, we actually have to do some work! Imagine that!...

The screenshot shows the ClubRunner software interface. The window title is "ClubRunner : Default [CRT] - [Guests]". The toolbar contains several icons, with a red arrow pointing to the "Contact Schedule (F7)" button. The main window is divided into several sections: "Personal Info", "Extended Info", "Notes", and "Contact". The "Personal Info" section is currently active and contains the following fields:

- Objection: [Dropdown menu]
- Guest #: [Text field]
- Salutation: [Dropdown menu]
- First Name: [Text field]
- Last Name: [Text field]
- Address Line 1: [Text field]
- Address Line 2: [Text field]
- City: [Text field]
- State: [Text field]
- Zip Code: [Text field]
- Home Phone: [Text field]
- Work Phone: [Text field]
- Cellular / Beeper: [Text field]
- E-Mail Address / Fax #: [Text field]

The "Salesperson" section contains:

- Salesperson: [Dropdown menu]
- Group: [Dropdown menu]
- Source: [Text field]
- Interest: [Dropdown menu]
- Miscellaneous: [Text field]

At the bottom of the window, it says "Recon Ended @ 12:01 AM".

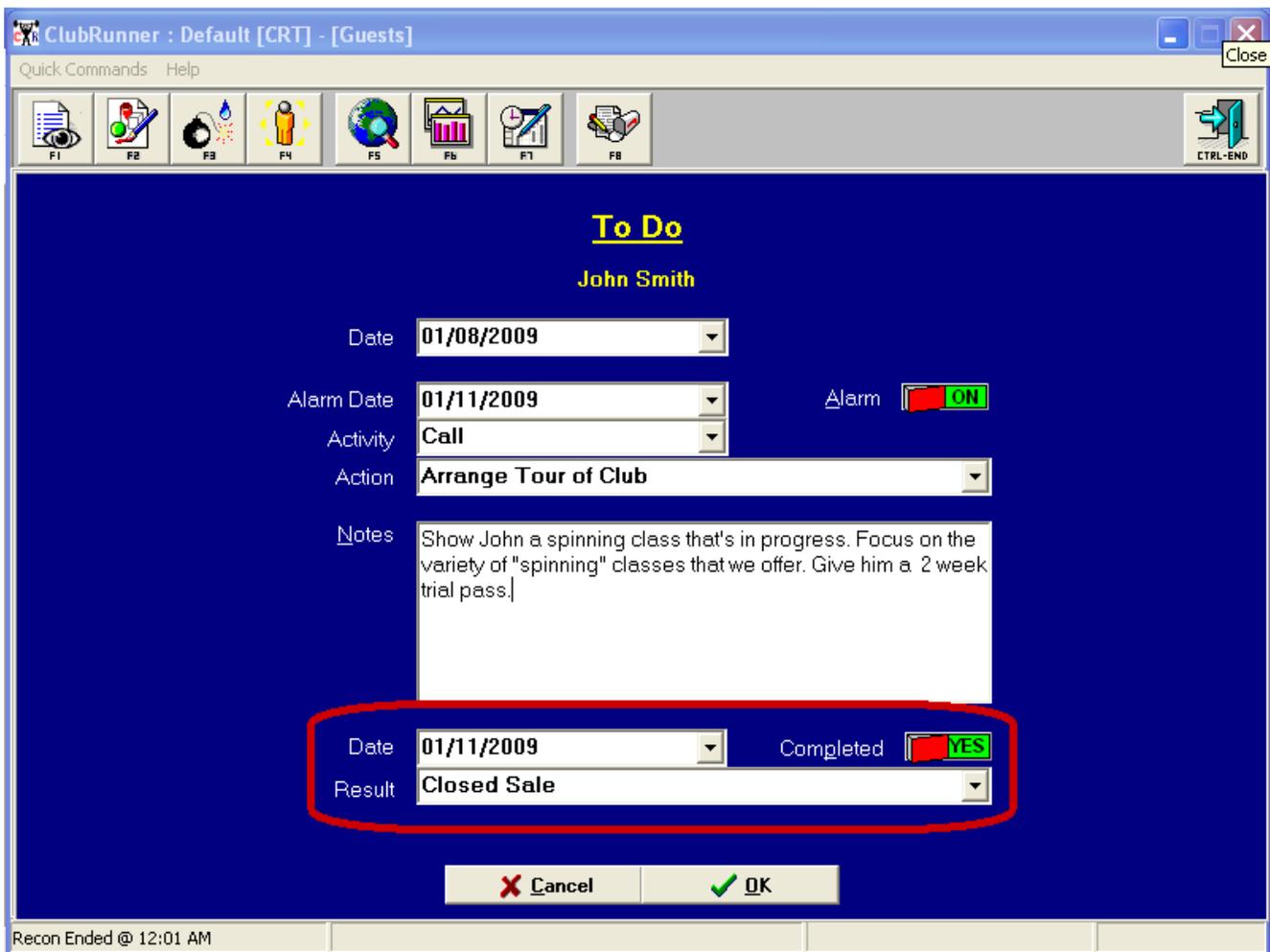
Click on the “Contact Scheduler” button (F7) and you'll see all contacts that are incomplete on or before today's date (i.e., do not have a “result”)...

The screenshot shows the "Current Schedule for Jeff Colen" dialog box. The dialog contains a table with the following data:

Alarm Date	Activity	User	Club	Contact	Action
01/11/2009	Call	JC	CRT	John Smith	Arrange Tour of Club

At the bottom of the dialog, there are "Cancel" and "OK" buttons. The window title is "ClubRunner : Default [CRT] - [Guests]". At the bottom of the window, it says "Recon Ended @ 12:01 AM".

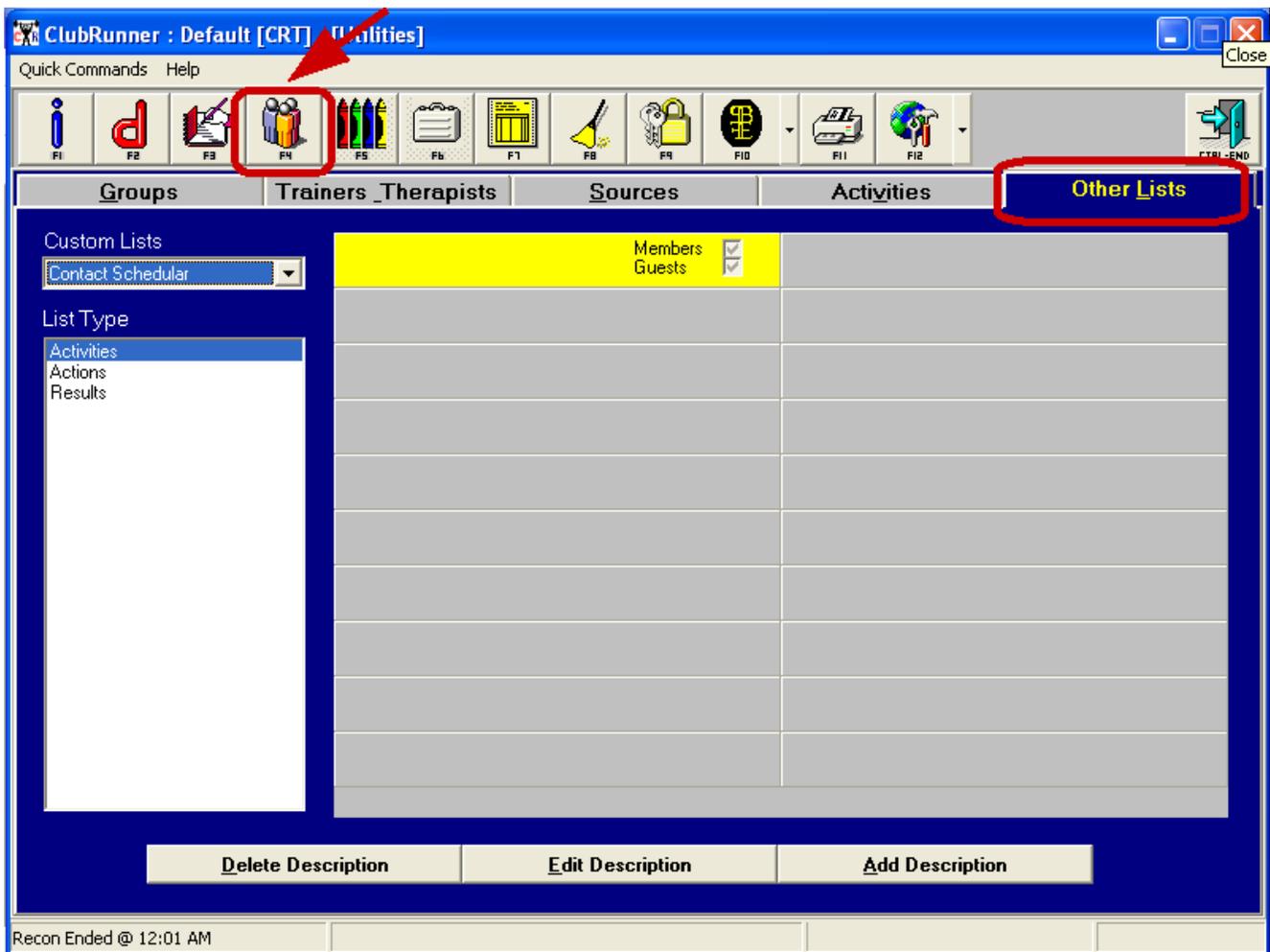
You can select any/all of the contacts and complete them by entering a “Result”...



Once completed with a “result”, the “contact” will disappear from your list. So, you think that you're an “expert” now? What's good for the “goose”, is good for the “gander”. What's good for the “guest”, is good for the “member”. The next example will show you how to modify the contact scheduler and apply it to members. Let's start with “changing” or “modifying” the “Activity, Actions & Results” tables...



After entering the Utilities Module, go to the “Other Lists” tab...



On the left side you'll need to select the appropriate “list”. We'll start with the default, “Activities”. **IMPORTANT...Once you begin to modify any of these “lists” (Activities, Actions and Results), the default words from ClubRunner in those tables will disappear. From that point forward, any modifications that you make to these tables will be appended to the “new” table that you've created.** So, as an example, when you begin to do these modifications to the “Activities” table,

To Do
John Smith

Date: 01/08/2009

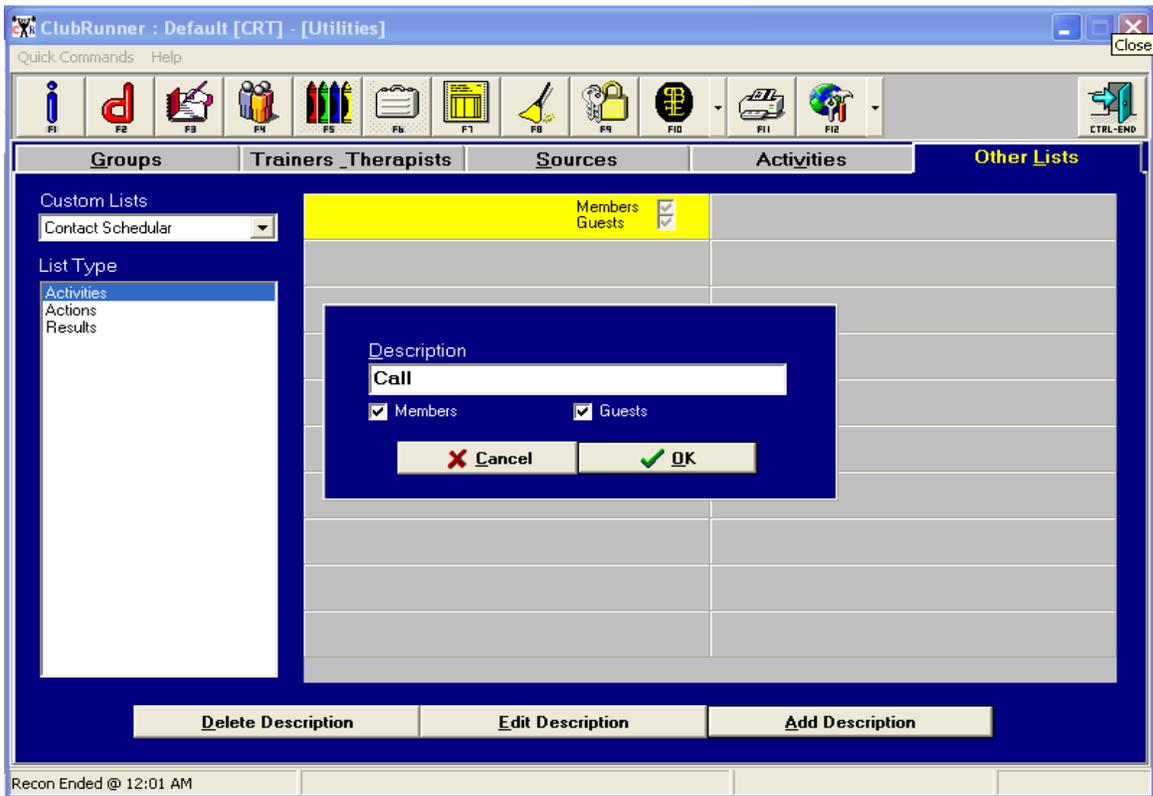
Alarm Date: 01/11/2009 Alarm: ON

Activity: Call

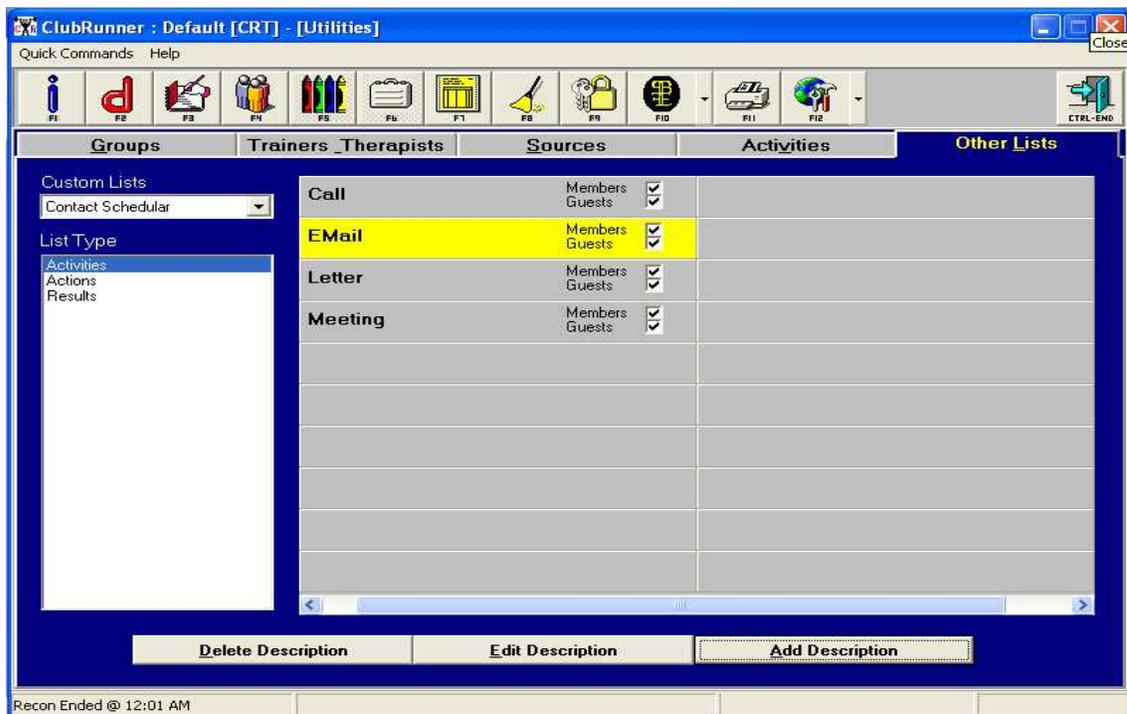
Action: Call

Notes: Meeting in progress. Focus on the... we offer. Give him a 2 week

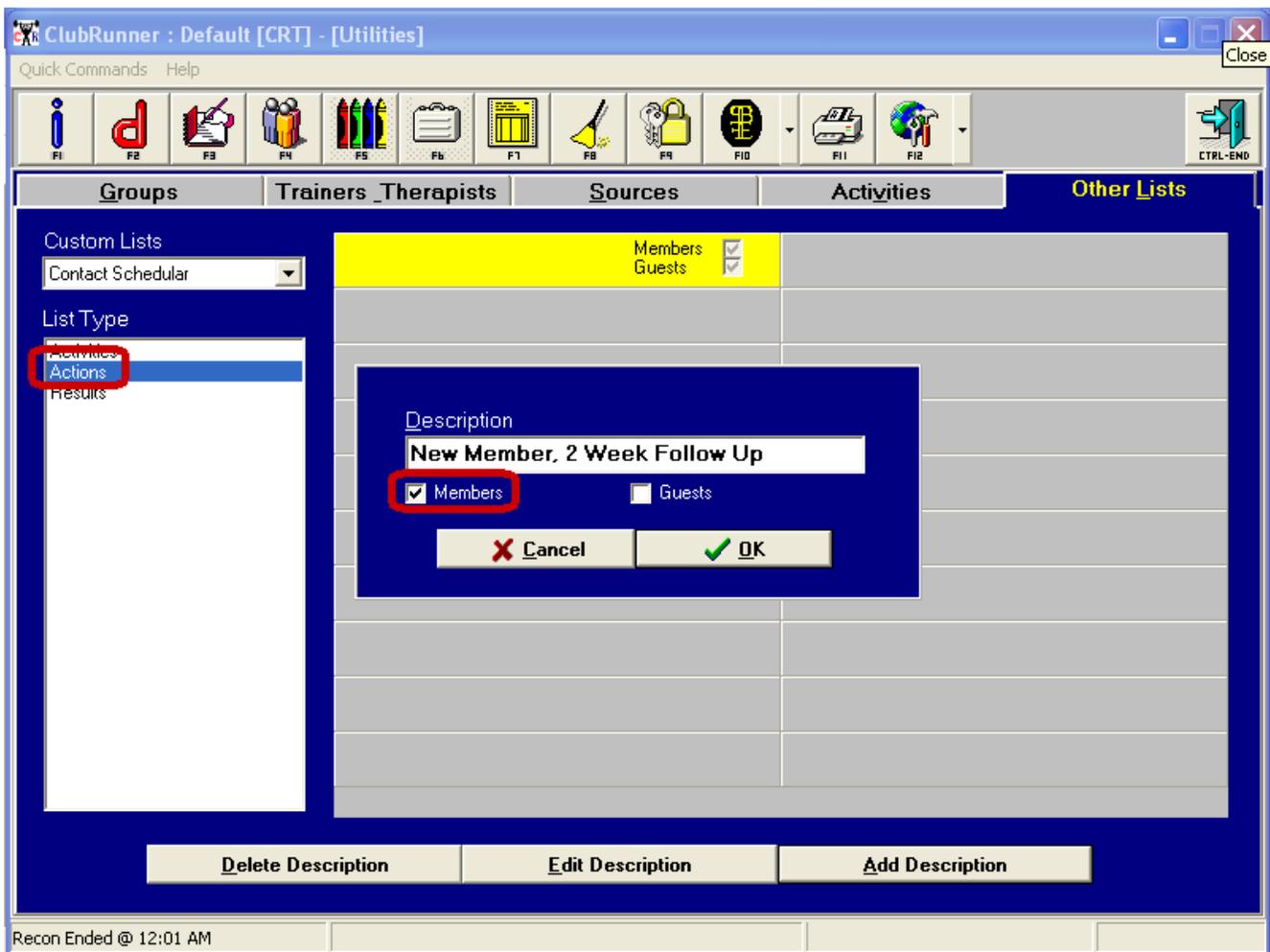
that table will “disappear”. You can re-enter “Call”, “Letter”, “Meeting”, “Message”, “Tour of Club”, etc., plus your own words. When setting up these tables, you’ll have a choice of whether the words that you choose to populate these tables with are for Guests, Members, or both...



“Call” will be an Activity for both Members & Guests. “Letter”, “EMail”, “Meeting”, etc., will be “Activities” for both Members & Guests...



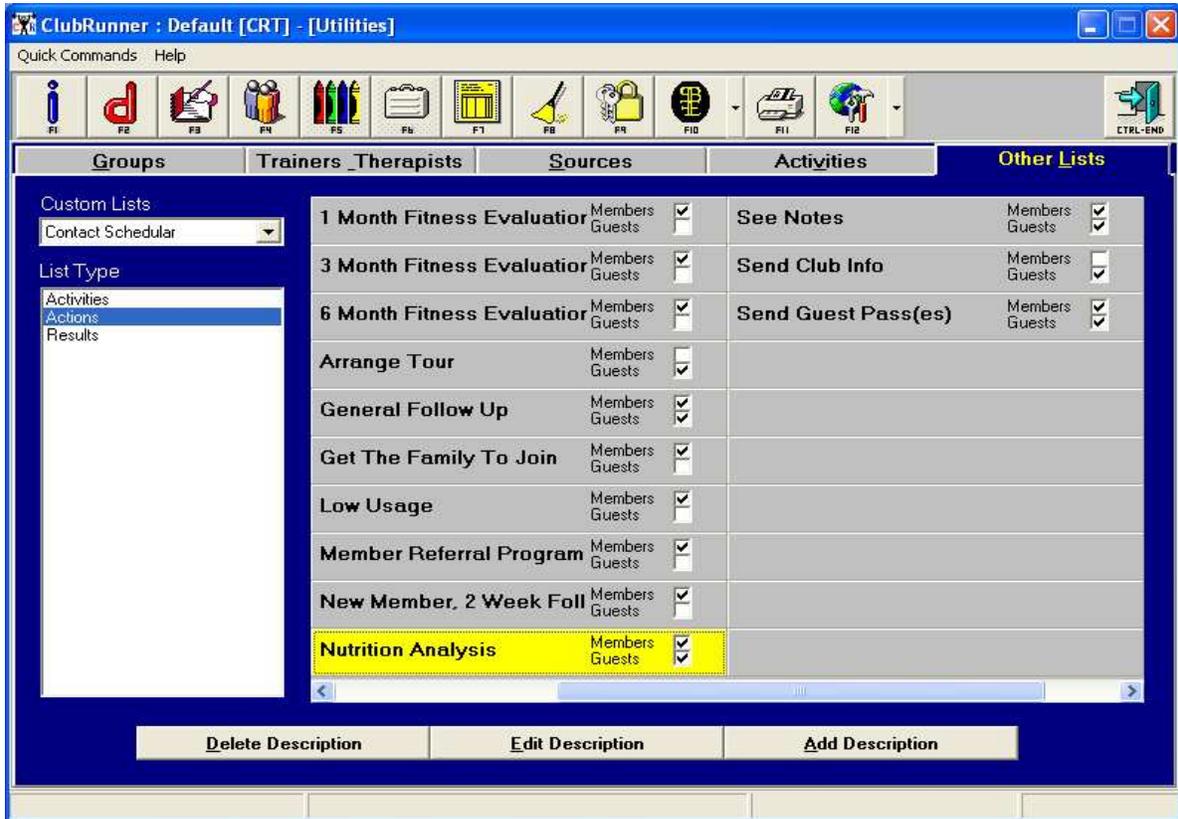
Now, we'll modify the "Action" table...



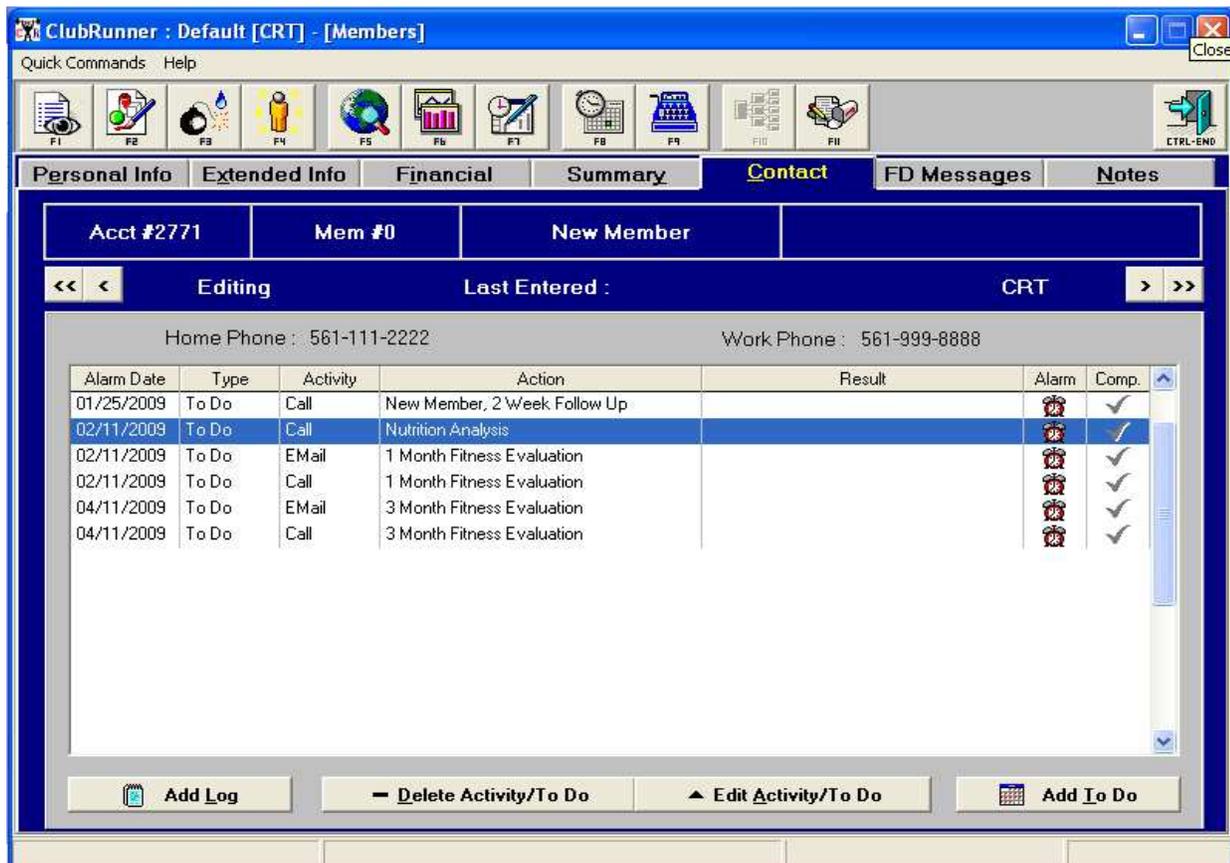
Notice that this "action" will only be for "members". When we sign up a member, we'll set them up on a follow up schedule to make sure that they are using the club regularly, evaluate their progress, are enjoying the club, our staff is courteous and helpful, encourage them to try personal training, spinning classes, etc, etc, etc..

Of course, you can always run reports from Clubrunner that will "isolate" these members (new members within 30 days, new members within 90 days, etc). You can mail, email, call these members, etc. by running these reports, but, the Contact Scheduler is more precise & personal. It allows you to develop a follow up system and keeps records of that system. Most facilities use a combination of both Reporting and Contact Scheduling.

Continuing to populate our "actions" list, we might end up with...



Note the “Nutrition Analysis” action is for both Members & Guests (you may want to offer Guests a free “Nutrition Analysis”). So, when a member joins your facility, you might do the following...



To finish up, an example of a “Results” list would be...



Once again, note that some “Results” can be for both Members & Guests.

There are numerous reports that can be run under your *CR Canned Reports/Contacts* folder, providing detailed information about contacts for Members or Guests