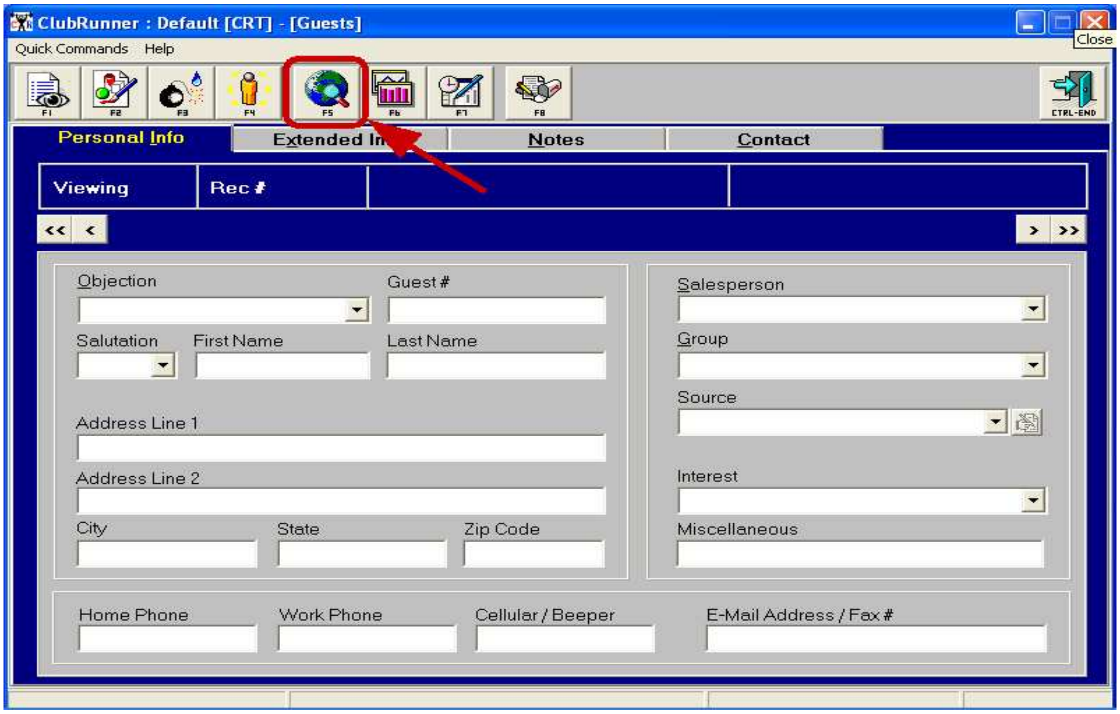
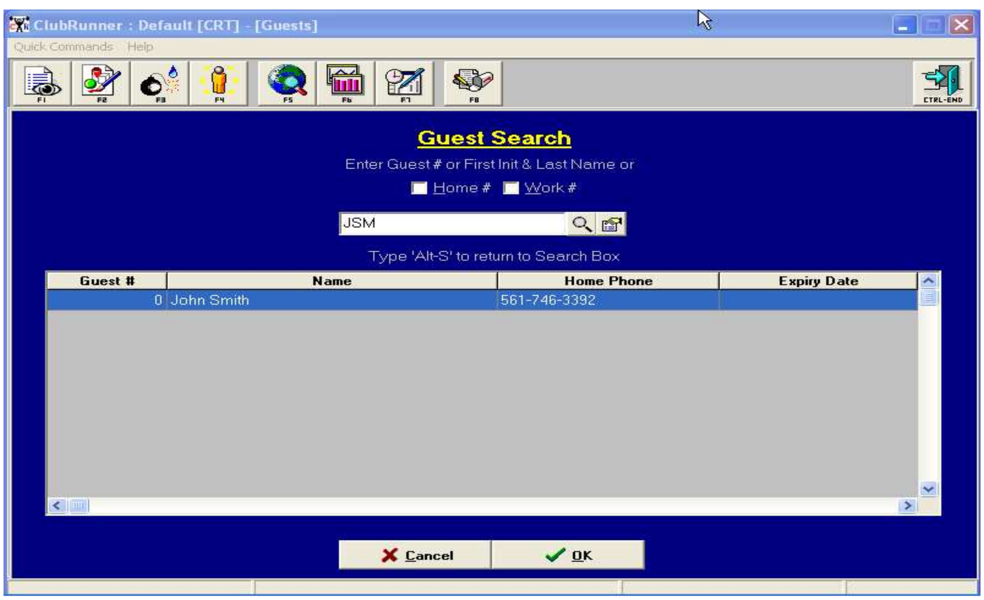
Contact Manager

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.

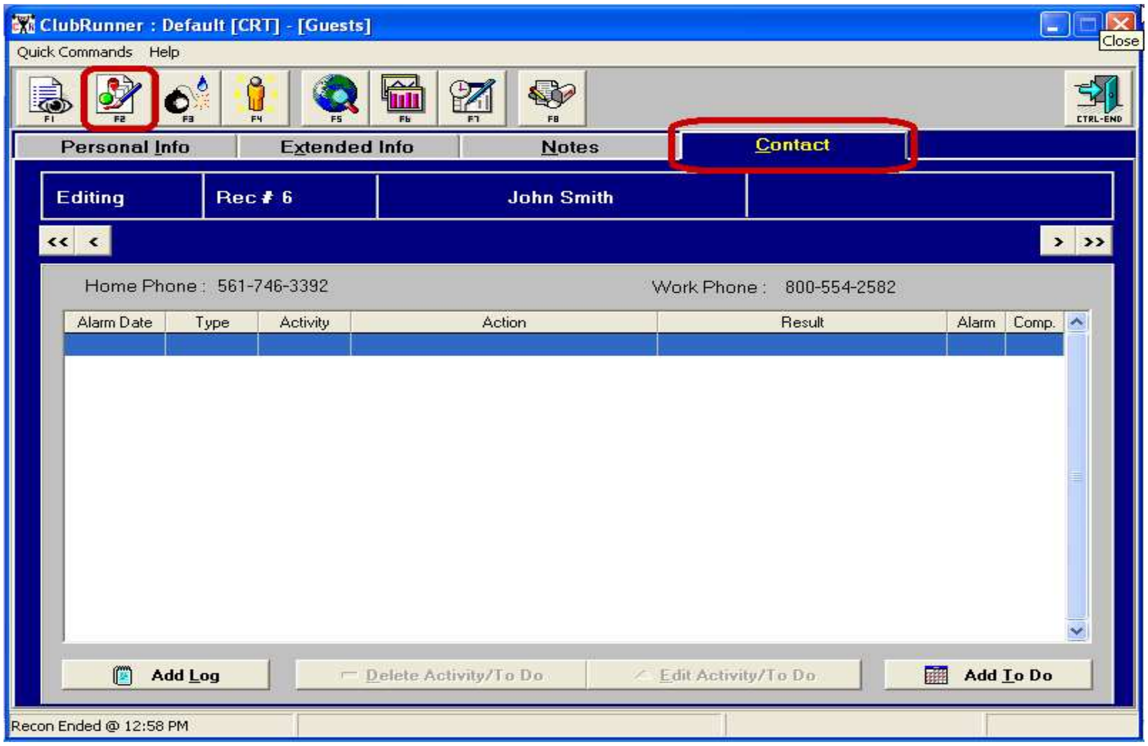
Guests Example...

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"...

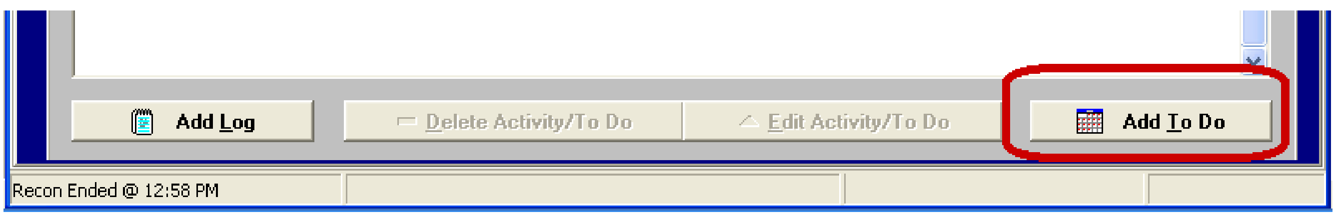




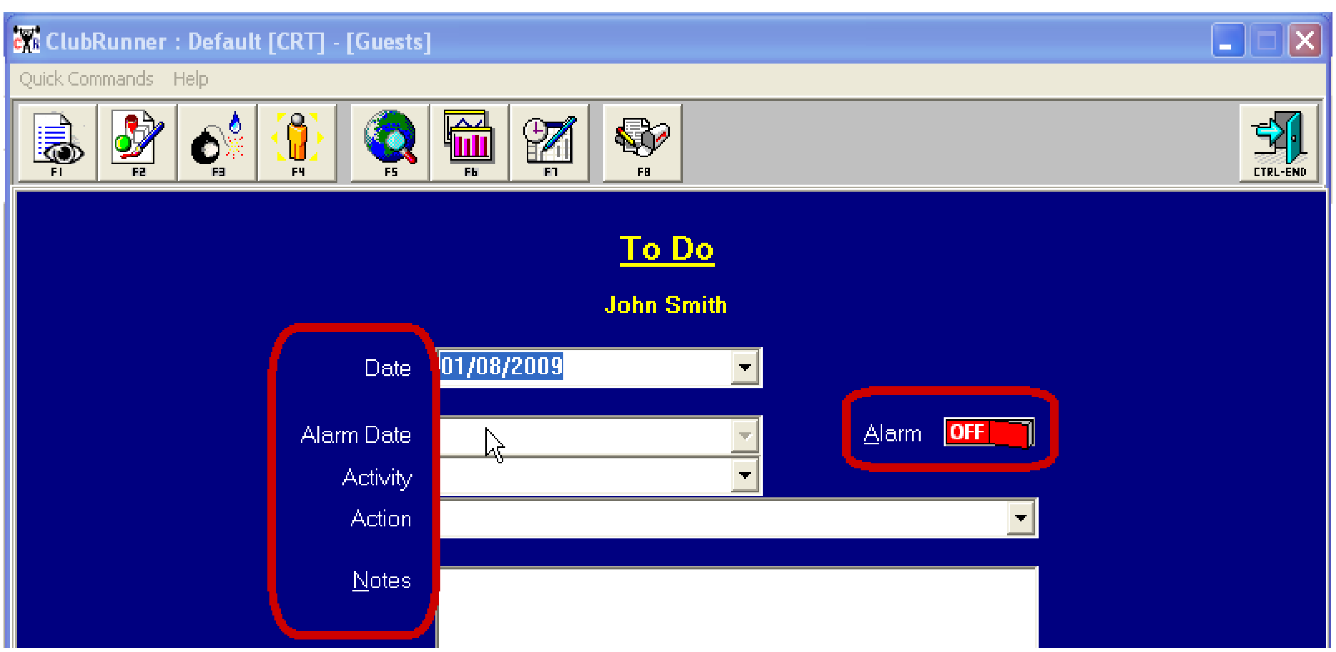
After selecting the guest, go in to the “Edit” mode (F2) button and click on to the “Contact” tab...



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...

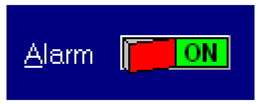


Filling in the the "To Do" screen...

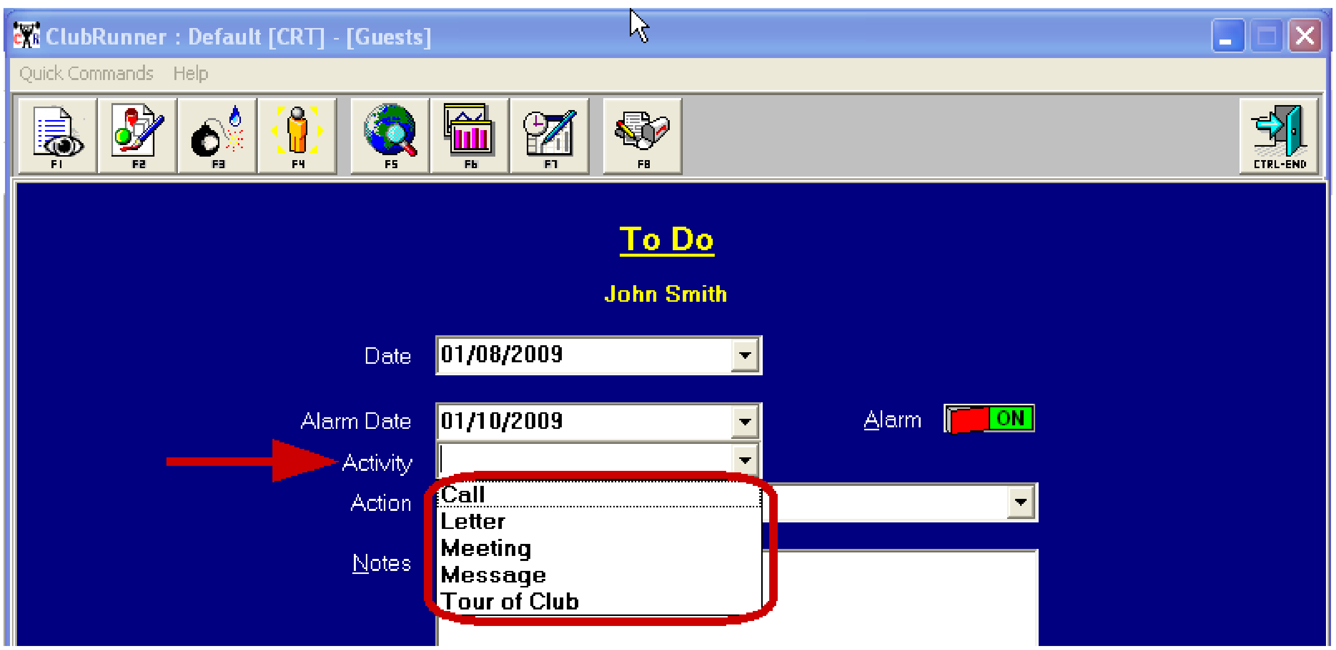


Date: The default is today's date, which is the date that you are creating this contact. However, this date can be changed to relect the actual date that this action occurred.

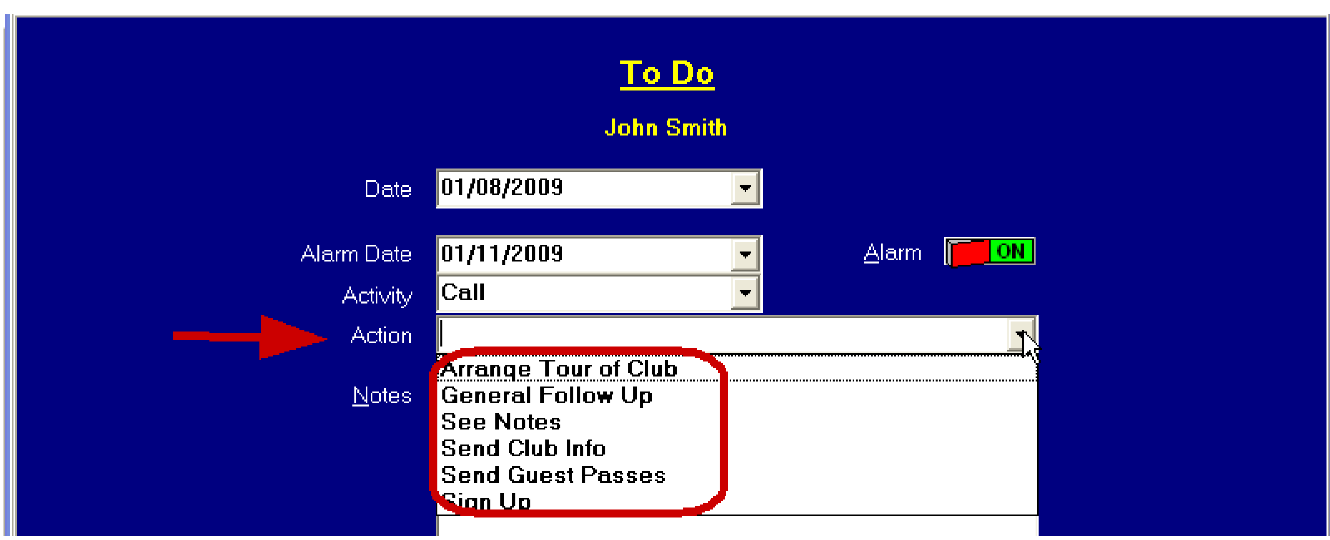
Alarm Date: This is when you want to be reminded to take whatever the "Action" is. When an employee enters the "Guest" or "Member" module with their password, ClubRunner knows who they are. ClubRunner checks any Guest or Member contacts (depending upon which module you entered) that the employee may 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!***



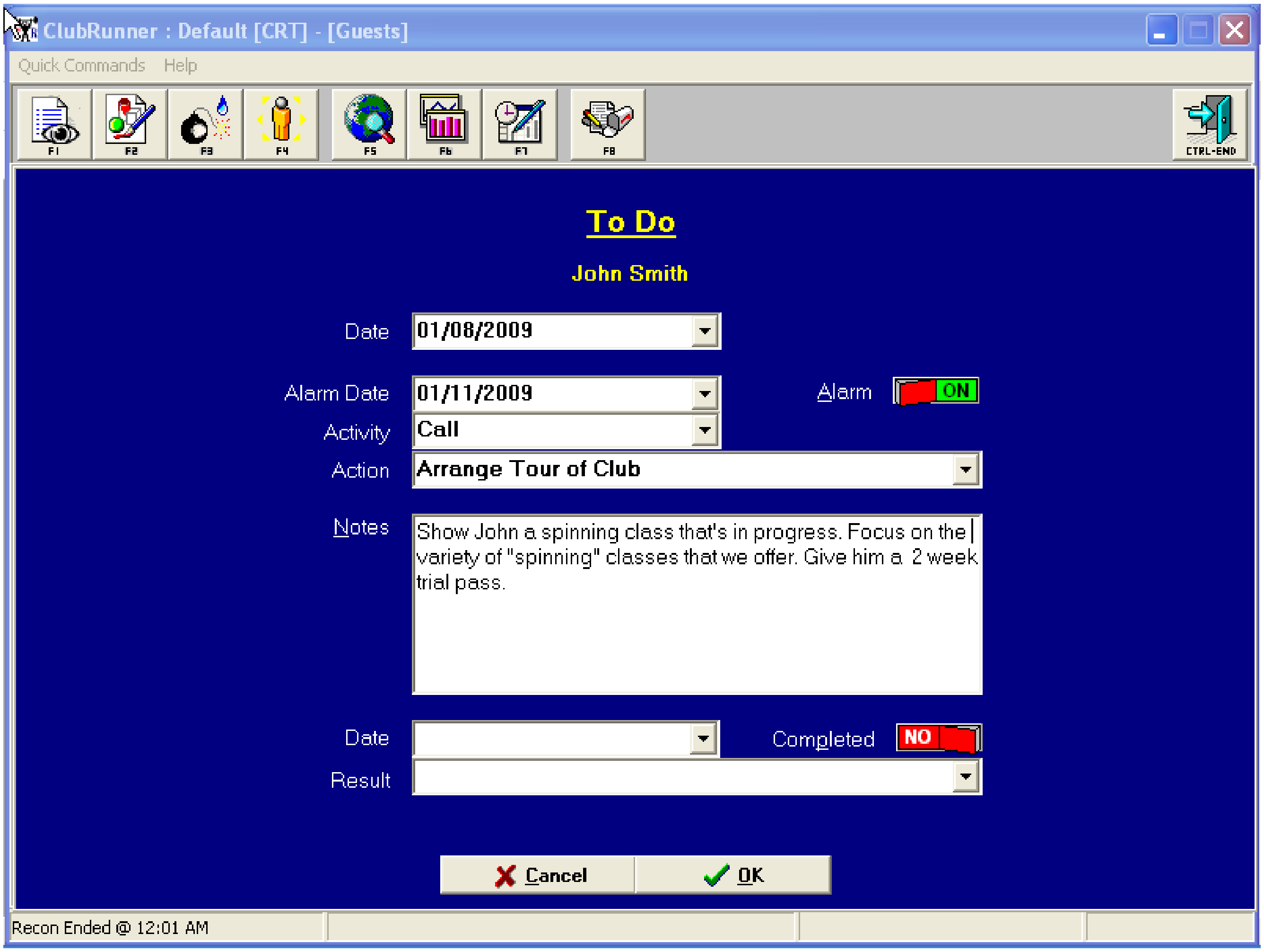
Activity: This drop down window is where you choose the "Activity" that you want to do on the "Alarm date". The drop down window list can be edited and changed by you in the "Utilities" section of ClubRunner (more about that later on).



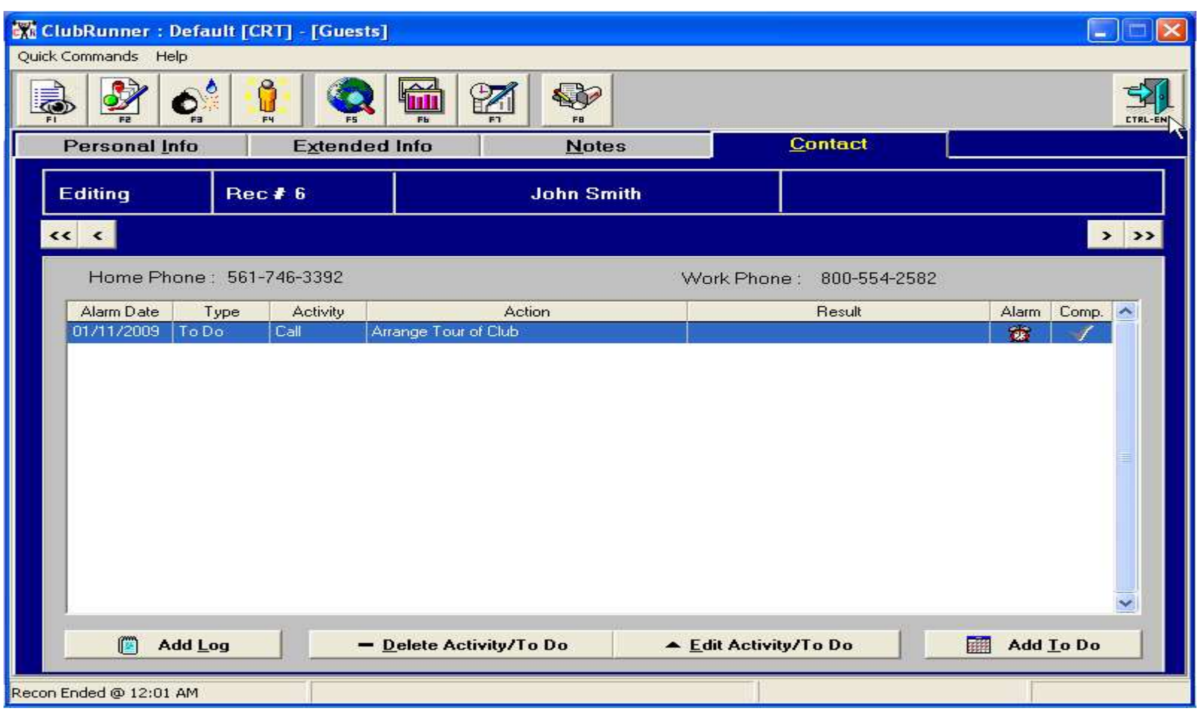
We'll pick "Call" as our "Activity", and then proceed to set the "Action" of the "Call"...



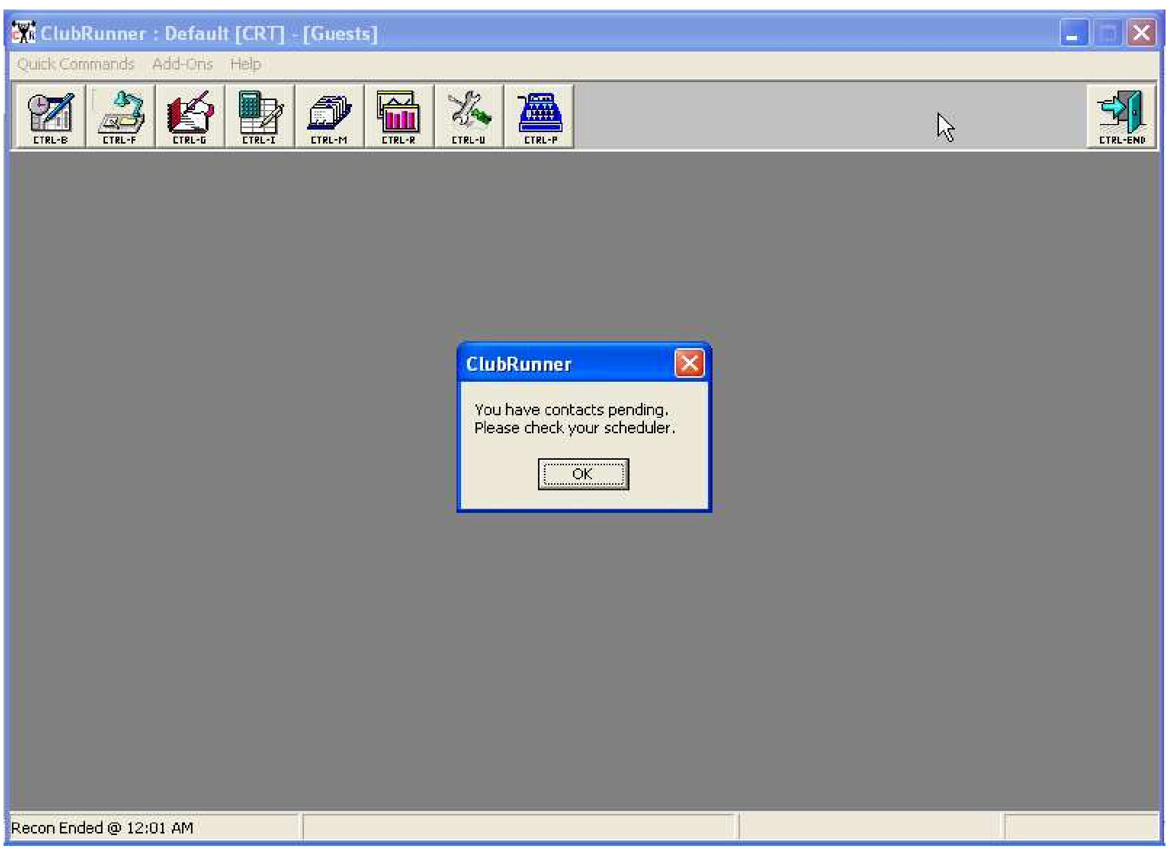
We also know that John is interested in our spinning classes, which we'll add to our notes and the "To Do" section would look like this...



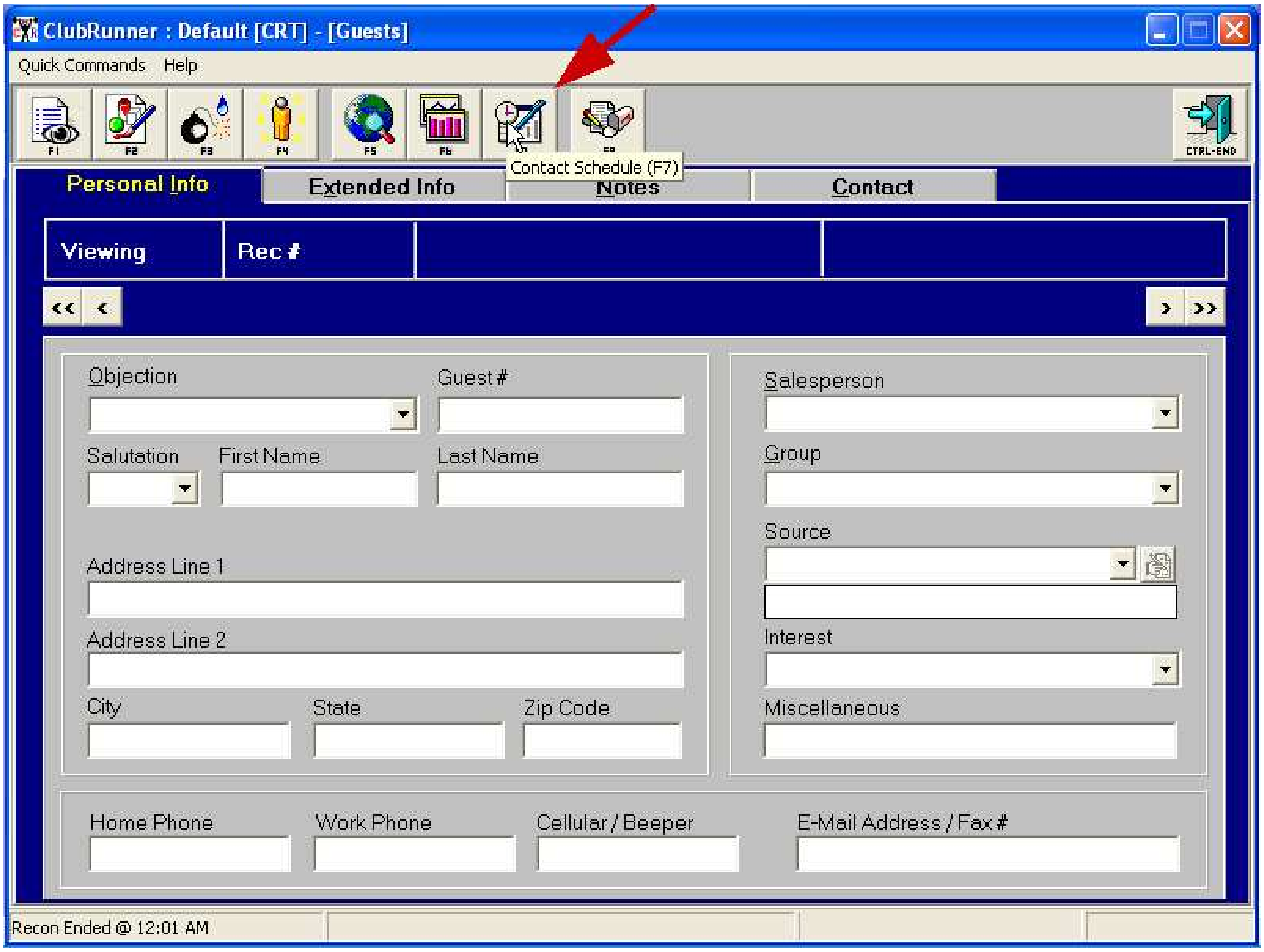
After clicking "OK", my "Contact" tab would look like...



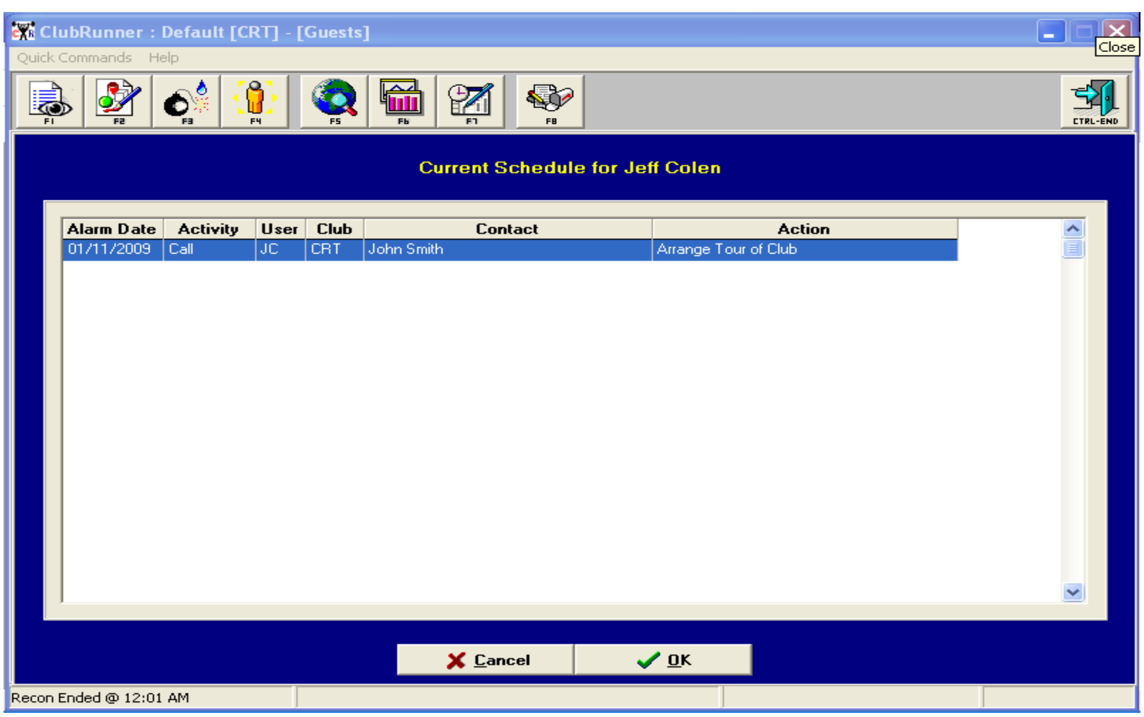
All done! I'll just sit back and let ClubRunner do my job! Everytime time I enter the Guest module (on or after January 11th, the alarm date), I'll see the message...



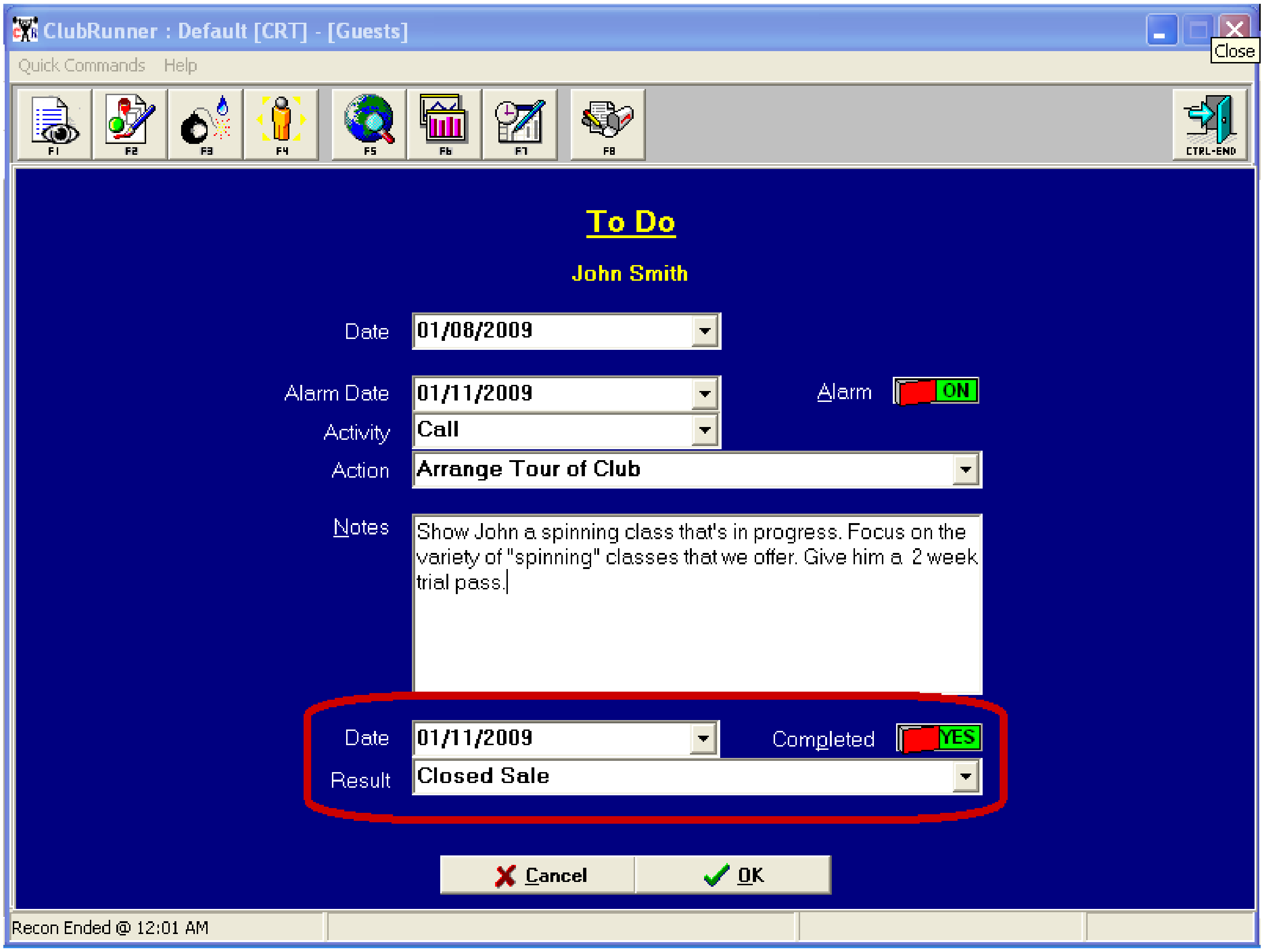
This is the "hard" part, we actually have to do some work! Imagine that!...



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")...

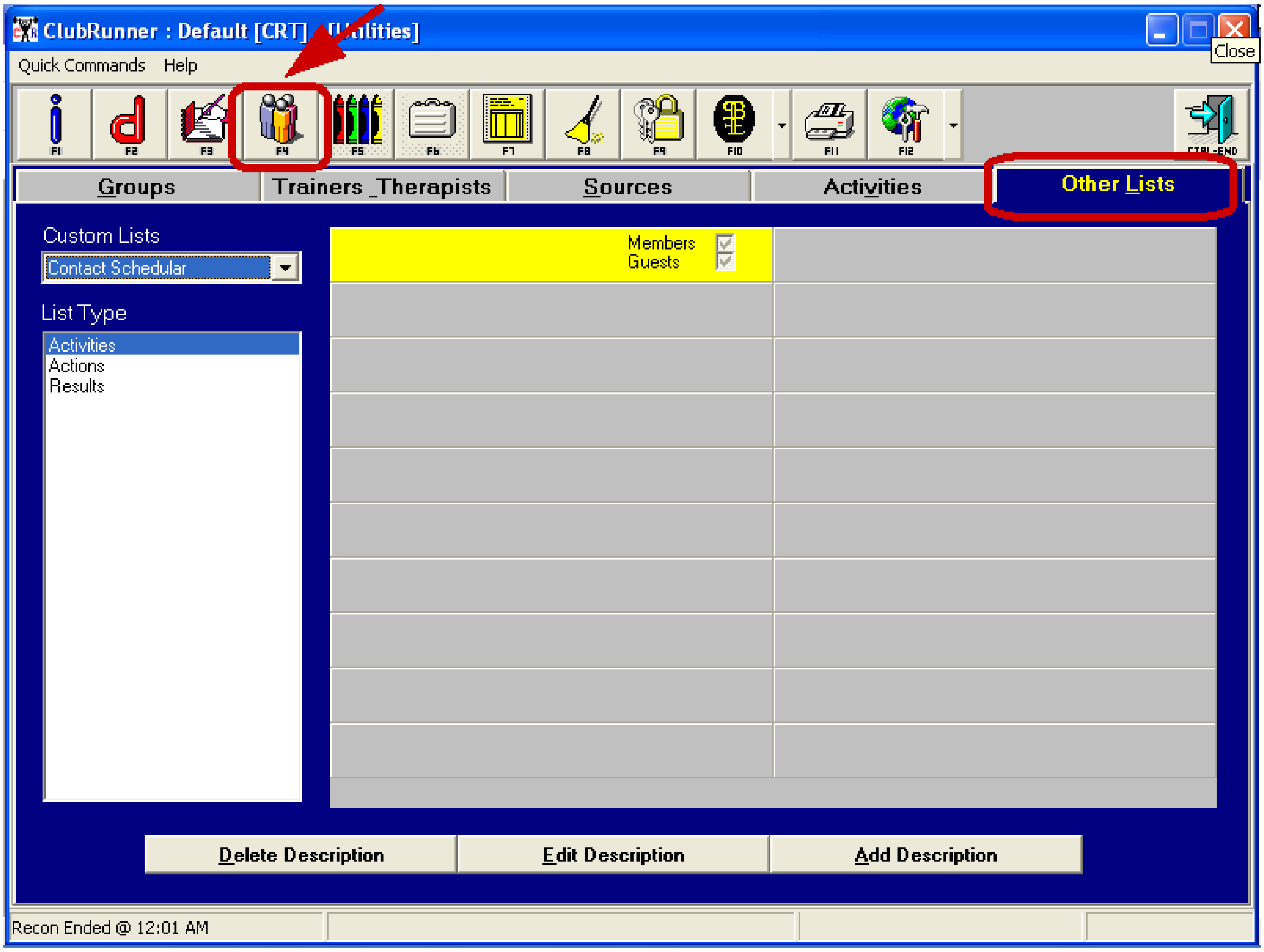


You can select any/all of the contacts and complete them by entering a “Result”...



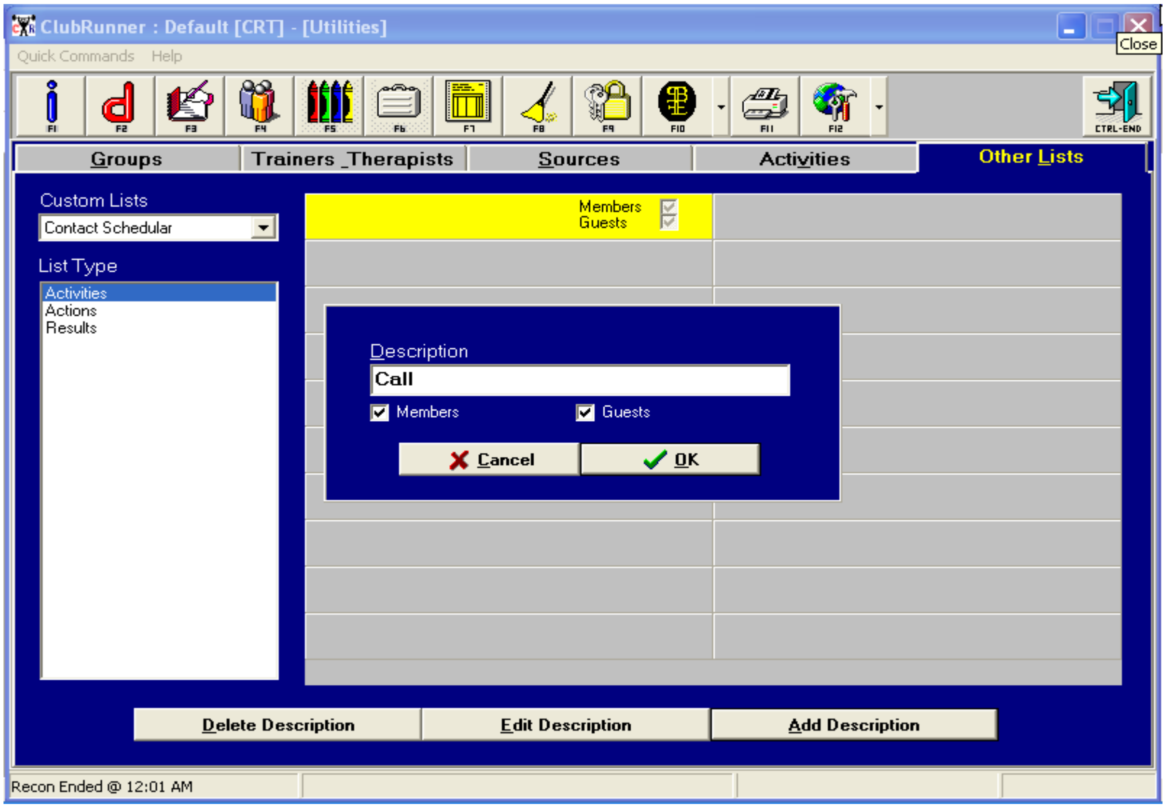
Once completed with a “result”, the “contact” will disappear from your list. So, you think that you're an “expert” now? What's good for the “goose”, is good for the “gander”. What's good for the “guest”, is good for the “member”. The next example will show you how to modify the contact scheduler and 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...

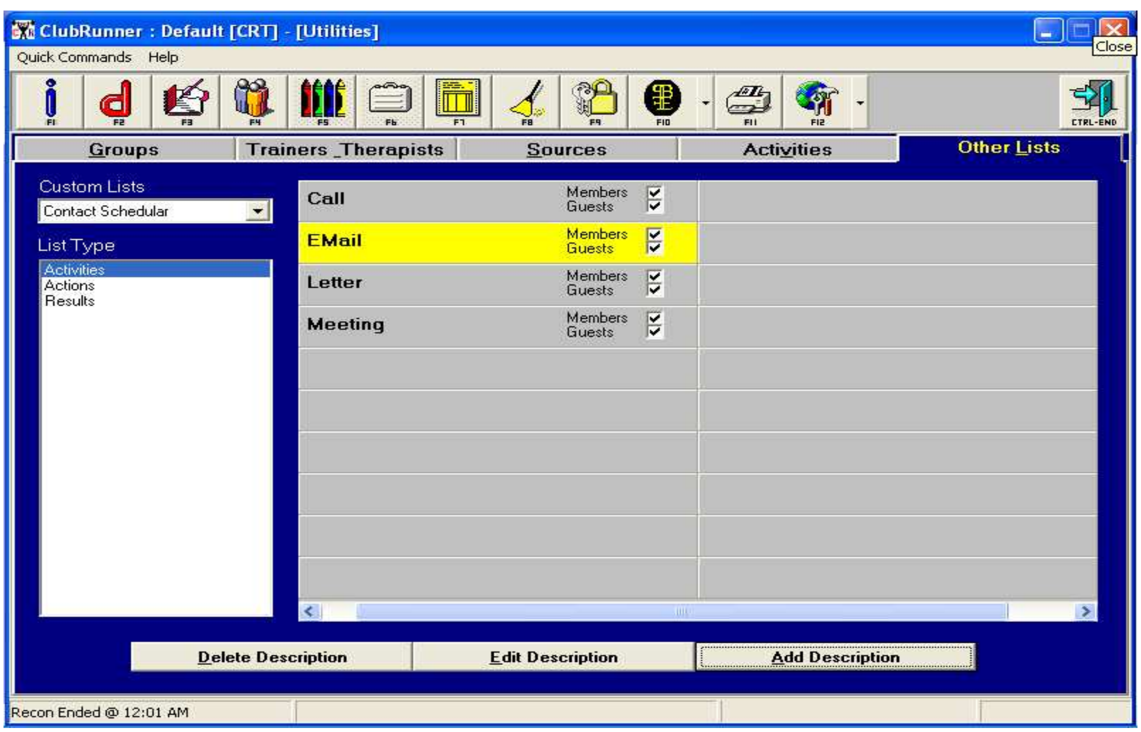


On the left side you'll need to select the appropriate “list”. We'll start with the default, “Activities”. ***IMPORTANT...Once you begin to modify any of these “lists” (Activities, Actions and Results), the default words from ClubRunner in those tables will disappear. From that point forward, any modifications 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,

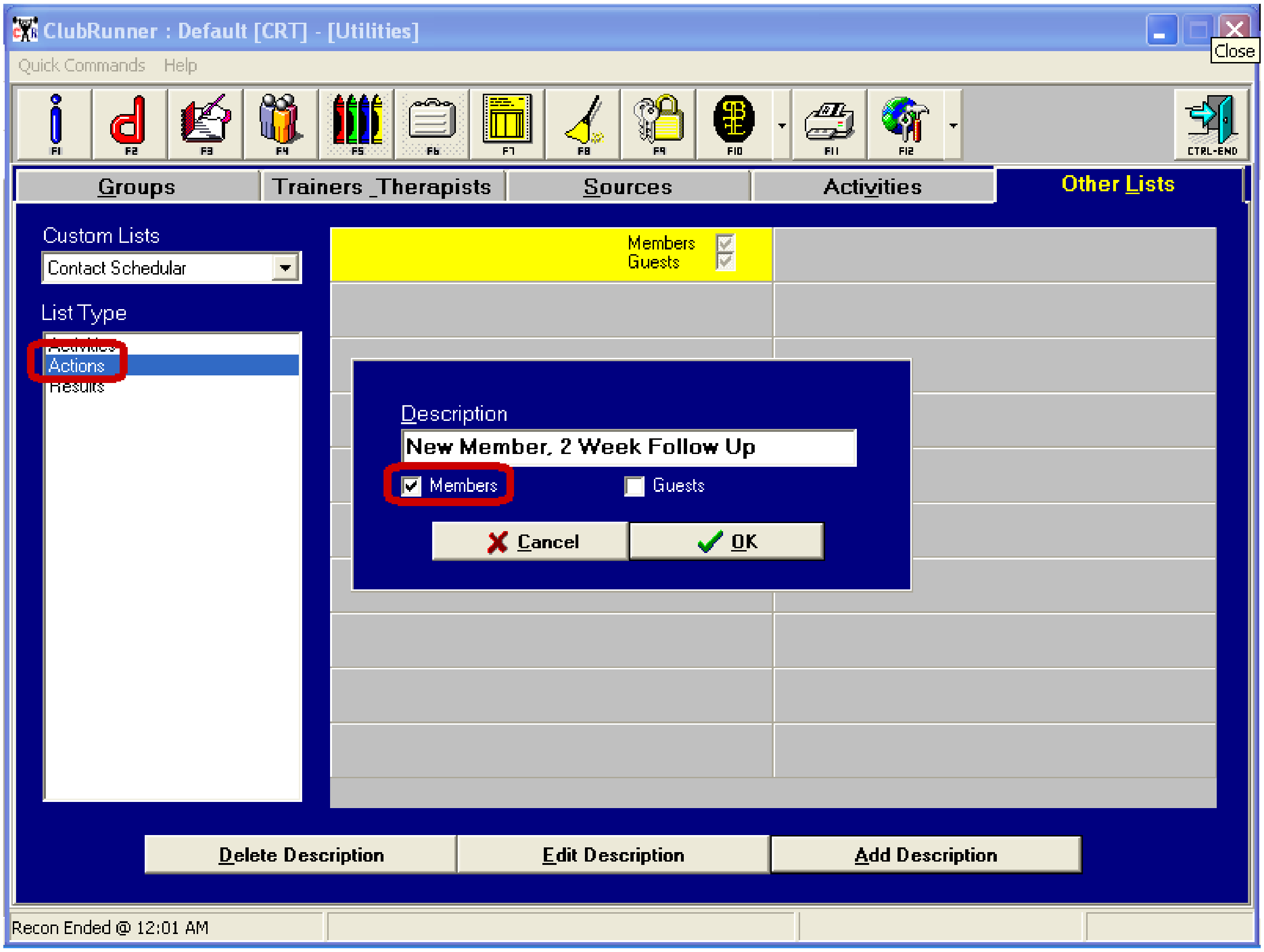
that table will “disappear”. You can re-enter “Call”,”Letter”,”Meeting”,”Message”,”Tour of Club”, etc., plus your own words. When setting up these tables, you'll have a choice of whether the words that you choose to populate these tables with are for Guests, Members, or both...



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



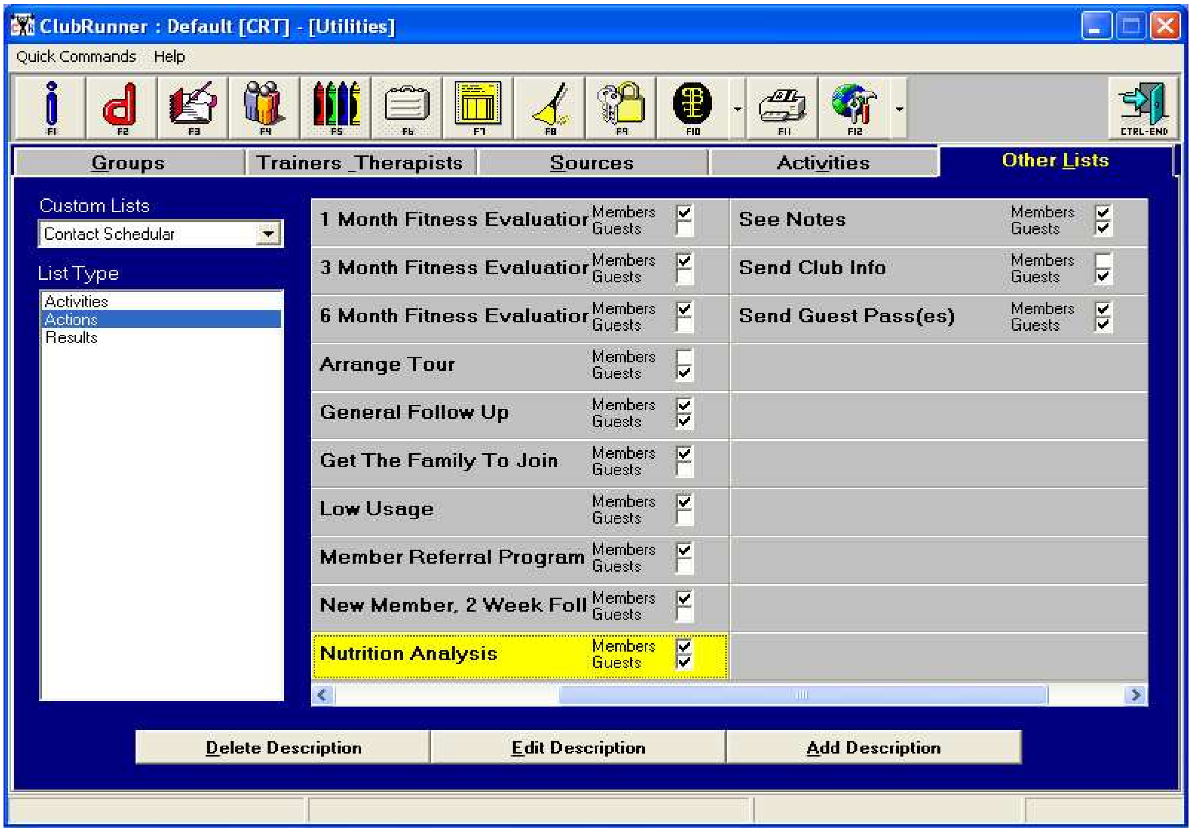
Now, we'll modify the “Action” table...



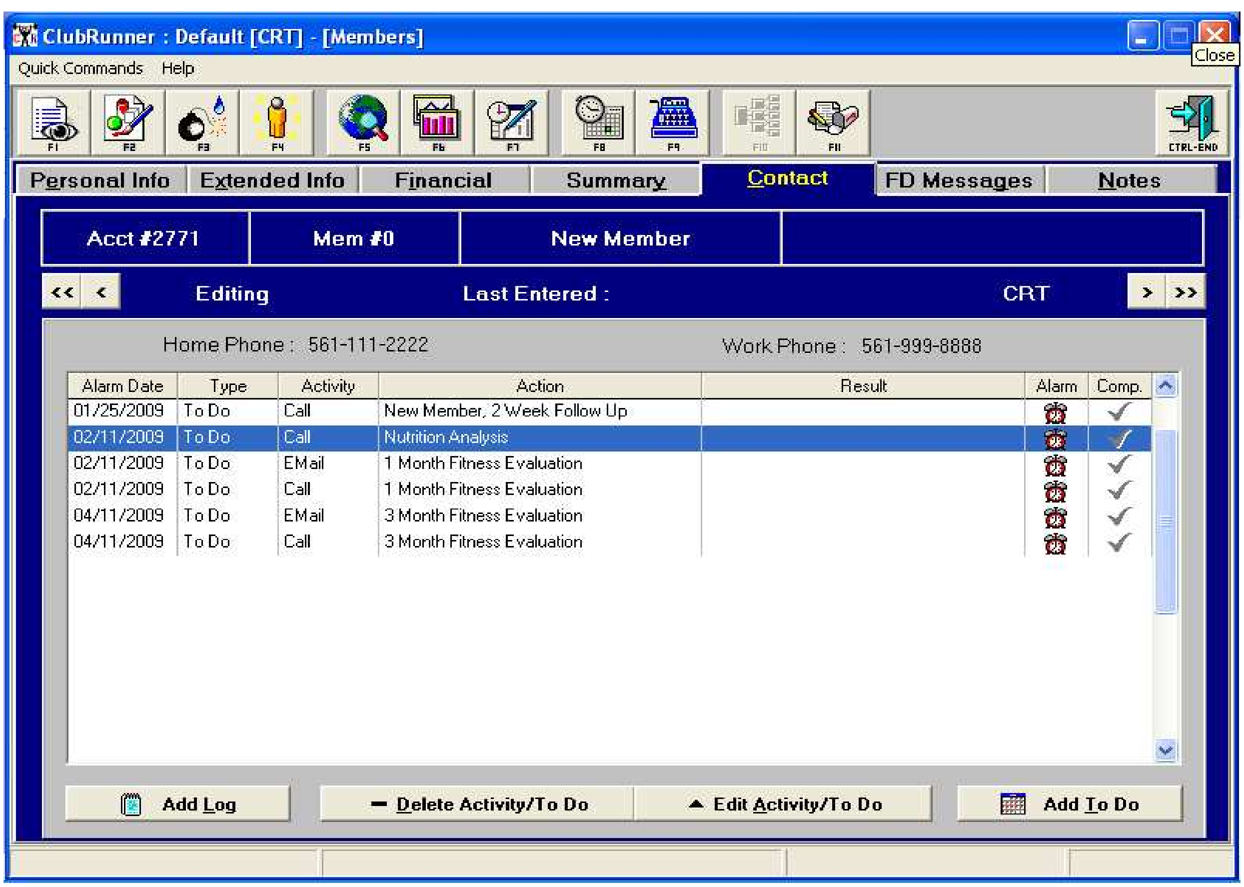
Notice that this “action” will only be for “members”. When we sign up a member, we'll set them up on a follow up schedule to make sure that they are using the club regularly, evaluate their progess, are enjoying the club, our staff is courteous and helpful, encourage them to try personal training, spinning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