# Welcome to Club OS!

Introduction

Welcome to Club OS! If you are brand new to club OS, or just need a refresher, this is a great place to start. Club OS streamlines the day to day work for gyms and studios so they can focus on doing what they do best - helping people reach their health and fitness goals. Our software helps with **sales, marketing, scheduling,** and **tracking**; and keeps **member and staff information** organized and accessible.

Front desk staff can collect guest information; salespeople can manage and complete their follow-ups and get real-time data on whether they're meeting their targets; trainers can schedule and message their personal training clients; and club management can create email marketing campaigns and call scripts and stay on top of general operations.

Our software can help you whether you're a club or studio manager, salesperson, trainer, or front desk employee. Here we'll provide a quick overview, explain some of the ways you and your coworkers can use Club OS, and show you where to go if you want more information.

System overview

To get started in Club OS, log in to the system with your designated username and password. Talk to your manager if you don't have one yet, and they'll be able to get you set up. (**Note:** *The first time you log in, you will need to accept the terms and privacy policy, and may be prompted to change your password.*)
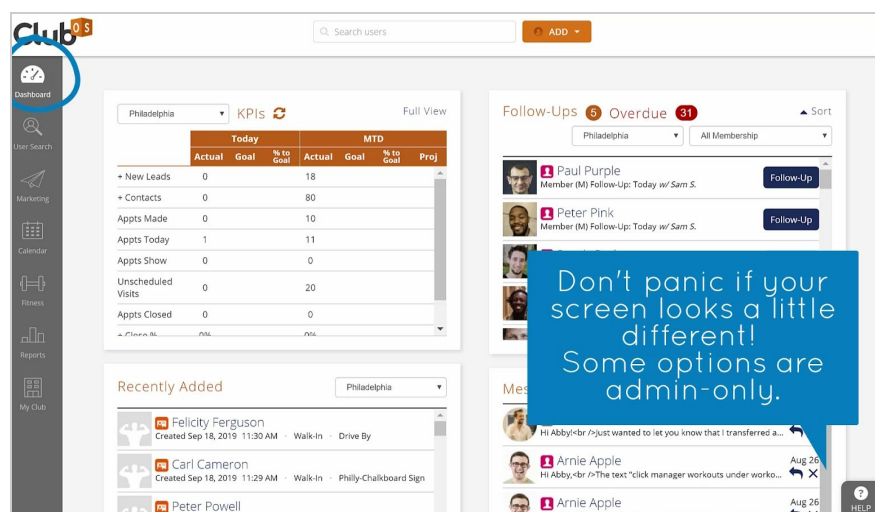
Once you log in, the first thing you see will be your **dashboard**. Club OS provides different tools for different jobs. **Depending on your role, your screen and available tools may look different.**

Whenever you need to return to your dashboard, you can go back in a single click using the **Dashboard** link on the top left.

Navigation Menu
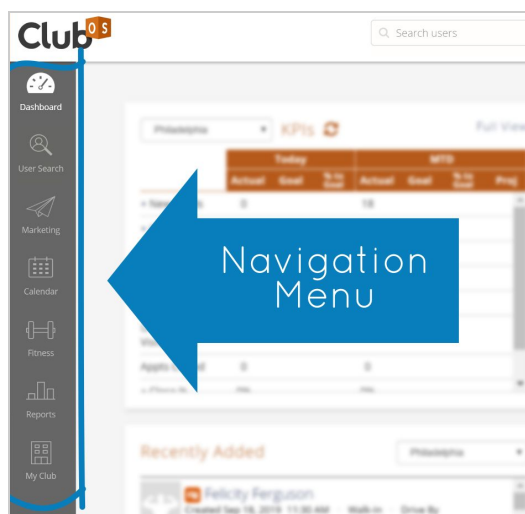
- In **User Search**, you can add prospective clients or look up existing members and staff. You can do a quick user search at any time at the top of the screen, or conduct a more in-depth search by using the link on the side menu.
- The **marketing** section is used to build email templates and set up and send campaigns.
- Depending on your role, you can use the **calendar** to manage just your own schedule, or make appointments and set availability for other staff members and club guests.
- The **Fitness** area of Club OS can help trainers and their clients keep track of fitness and nutrition goals.
- Club OS can generate **reports** for certain users with sales stats, employee activity, member data, and other information. You can generate reports on demand, or receive them automatically on a schedule you set.
- Management can use **My Club** to create settings specific to their club or location, like specific sales targets or assigned follow-up staff.

Main Dashboard

On the main area of the dashboard, you'll see various **widgets**.
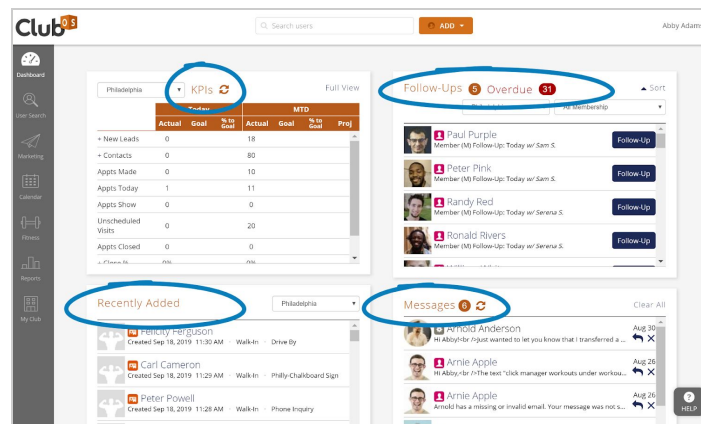
- **Key Performance Indicators (KPIs)** track a club's or a salesperson's progress in real time.
- **Follow-ups** displays the specific sales activity that should be done today, based on your club's follow-up schedule. This includes text, phone, and email communication with prospective or current members.
- You might get **messages** from other users, including fellow employees or gym members. The most recent will always be displayed here. If you opted to have copies of your own messages sent to you, they'll also appear here.
- New leads will show up in **Recently Added**. Some users can only see leads that are assigned to them, while others can view all the leads at a particular location or sort them by the employee they're assigned to.
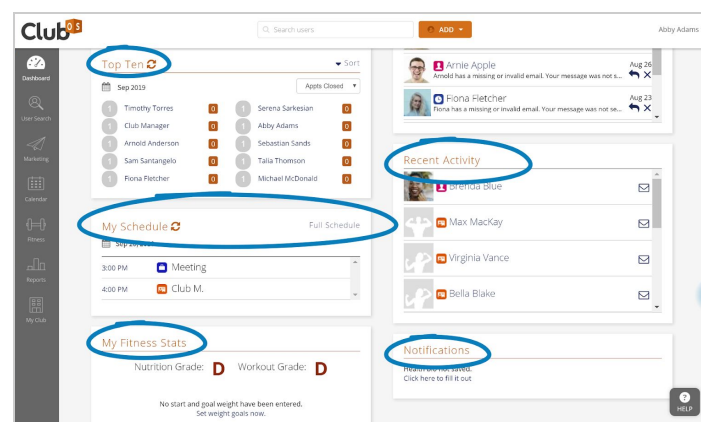
- **Top Ten** helps managers evaluate how their club is performing on selected metrics.
- Your own **Recent Activity** is displayed on the right. This is handy if you need to refresh your memory, or quickly return to a profile you were just looking at.

- **My Schedule** shows a quick view of your schedule and any upcoming appointments. You can click on "full view" to see more detail and update your availability. You may be able to view and edit events for others, too.
- **Notifications** may appear with announcements, tasks or information you need to complete.
- Then at the bottom, some personal information about you, under **My Fitness Stats** and **My Information**.

Mouse over your name on the upper right to modify your personal **account settings**.
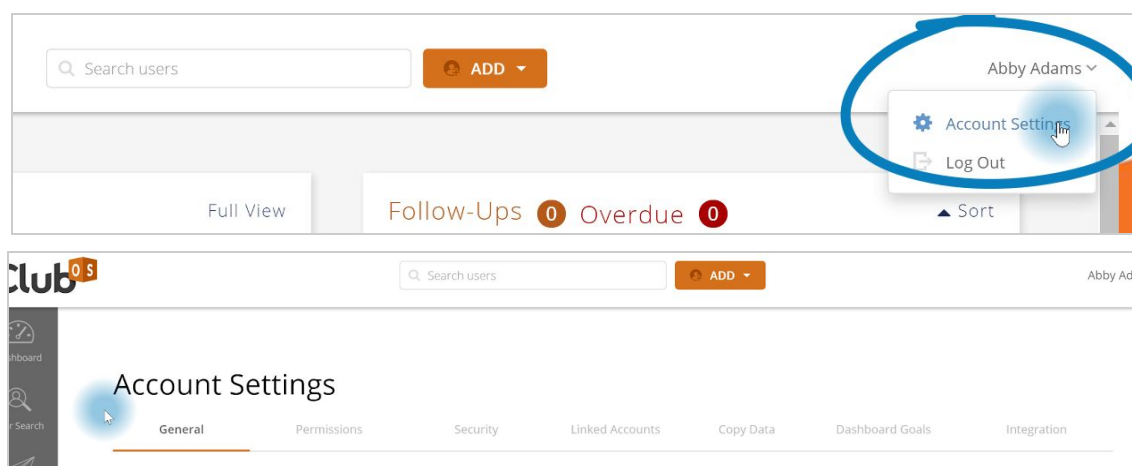
- On the **General** tab, you can change or update your own information and access the **Digital Guest Waiver**.
- In **Security**, you can change your username or password if you need to.
- **Permissions, linked accounts, copy data, dashboard goals** and **integration** are more advanced, and won't be covered here.

Common Terms

You might run into some unfamiliar words and phrases in the Club OS system. For reference, we have a glossary in our help library that you can access any time. Here are a few of the more common terms.

DGW

The **Digital Guest Waiver** collects information from guests and gets them entered into the system. Many clubs keep this bookmarked or pulled up on tablets for easy access. *(Note: You can always access the DGW link via the General Tab in Account Settings.)*

KPI

Stands for **Key Performance Indicator**. These are quick ways to check on someone's progress or performance towards a goal. Examples include the number of new leads, contacts, or appointments made by a salesperson.

Prospect

Prospects, or leads, are your **prospective** members or clients. You have their contact information, but they haven't bought anything yet. For example, if someone filled out the **DGW** on a recent tour, but hasn't signed up for a membership yet, their **user role** in Club OS is "prospect".

BB or Be Back

Be Back is a way that Club OS categorizes certain events for the purposes of tracking sales. A "be back" refers to an event where a prospect didn't sign a membership agreement on their first visit, and they are returning for another tour or appointment. You may see "BB" or "B" attached to some calendar events.

PT (Personal Training)

If your club provides personal training, you might see this acronym attached to certain people or events in Club OS.

ORT (Orientation)

Some clubs might refer to this as a **Fitness Assessment (FA)** or **Fitness Consultation (FC)**, or something else similar. Usually, these meetings are designed to encourage members to sign up for personal training or other service packages.

PT Follow-Up	
Status:	ORT Booked
Orientation Date:	Monday, September 9 2019 @ 1:00 PM
Follow-Up Date:	Monday, September 9 2019
Follow-Up #:	1
Follow-Up With:	Talia Thomson ▼

You might run into other unfamiliar terms from time to time. Remember, you can always consult Club OS help, including the glossary.

Roles overview

There are different **roles and permissions** within Club OS. Let's look at a few examples.

Club OS for Admins and Managers

Your **club admin** is someone who is responsible for the day to day operations of your club or studio. This person has access to a lot of information in Club OS. They might be in charge of just one location, or multiple locations. They might also be responsible for **sales and marketing** efforts, like writing standardized follow-up scripts for sales calls, or creating email campaigns to go out to prospects and members.

Depending on the size of your club, there may also be a **location manager** who reports to your club admin. The location manager is typically responsible for one location only.
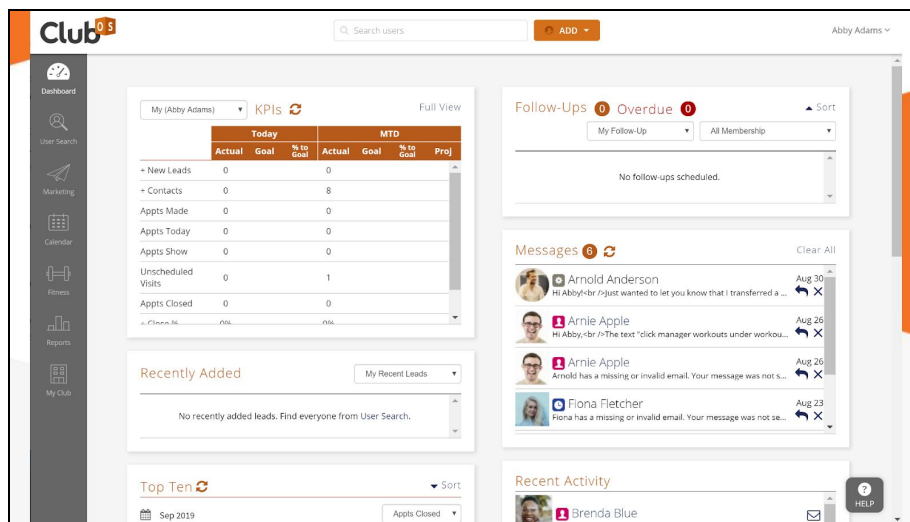
*This is a typical dashboard for a club admin.*

Here are a few parts of Club OS that your admin or location manager might use frequently:

- **Reports:** Club OS offers a wide variety of reports that can help managers track member and prospect activity, sales stats, and marketing campaigns. In the Reports area, managers and admins can pull up reports based on the latest data, or schedule reports to be automatically sent to them.
- **KPIs:** Managers can get a quick overview of how their club is performing by viewing the **KPI widget** right on the Dashboard. They also have the option to click over to Full View for more detail.
- **Follow-ups:** Here is where a manager can check up on the follow-ups that are scheduled to go out to prospects and members. They can see what is scheduled, what is overdue, and who is assigned. They can also **transfer follow-ups** from one salesperson or trainer to another, for example if a staff member is leaving the location.

- **My Club:** Contains tools that let managers set **location-wide** or **organization-wide defaults**. For example, this is where they can determine which email addresses should appear on outgoing communication, and make sure the appropriate staff are notified about things like new web leads or expiring guest passes.

Club OS for Salespeople

Salespeople use Club OS to follow up with prospects and members, maintain relationships, and keep track of their own performance.
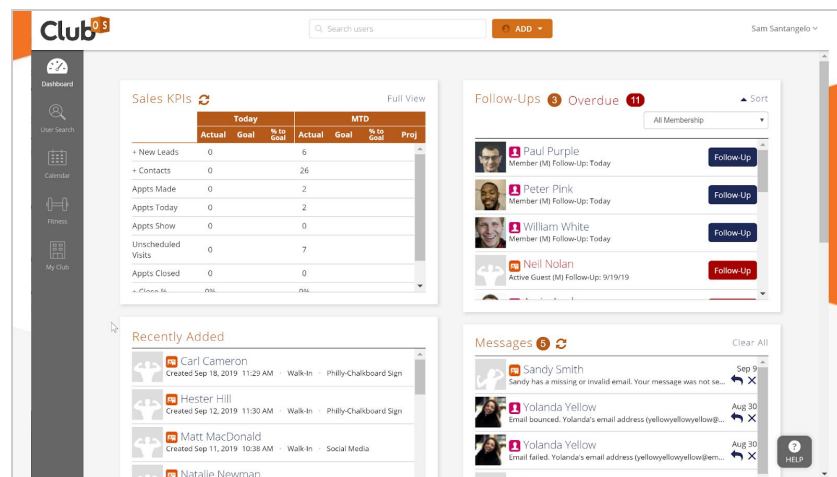
Sam the Salesperson's dashboard

- **Follow-ups:** The Follow-up Widget shows Sam **who he needs to contact today** in accordance with the club's regular sales flow. Follow-ups are color coded, and overdue follow-ups will display in red. Sam can also **sort** his follow-up list to see specific kinds of users (such as leads who have booked an appointment, or members who haven't signed up for PT yet).
- **Direct Contact:** Sam can use Direct Contact to call or message prospects and members outside of the follow-up schedule if he needs to. From the Follow-up or Direct Contact window, he can look at the **entire communication history** with a member or prospect all at once.

*Direct Contact window shows communication history on the right*

- **Recently Added:** A quick way to find a prospect who just got entered into the system - for example, a walk-in who just signed the Digital Guest Waiver.
- **KPIs:** Key Performance Indicators help Sam track his progress. He can see how he's doing today or over a set period of time, such as month to date **(MTD)**. The KPIs are **updated in real time**, and are the quickest way for Sam to see if he's on track to meet his targets.
- **My Schedule** and **Calendar:** Here's where Sam can review his calendar and **schedule new appointments** and tours. He can also set **appointment reminders** for himself and his guests.

Club OS for Trainers

If you're a trainer, your priorities are specific to your work with clients, and so are the tools. Trainers need to be on top of all their events and make sure they're tracking progress and keeping in touch with their clients. Club OS can also help keep training records up to date.

Timothy the Trainer's dashboard

- **Follow-ups:** At some gyms, Timothy might be assigned follow-ups to encourage people to sign up for personal training.
- **Direct Contact:** Just like Sam, Timothy can use Direct Contact to reach out to his clients. This is a great way to keep all his communication in one place and refresh his memory on each client so he can provide the best customer service possible.
- **My Schedule** and **Calendar:** Here's where Timothy can check his schedule, make changes to his availability as needed, and confirm attendance at events.
- **My Club:** Under My Club, Timothy can see a list of his clients and click on their names for more information.
- **Client Profile/Club Info:** Under Club Info inside a client's profile, he can view which trainers are assigned and which services the clients are signed up for. As always when viewing someone else's profile, he would **click the "x"** in the upper right hand corner to return to his own profile.
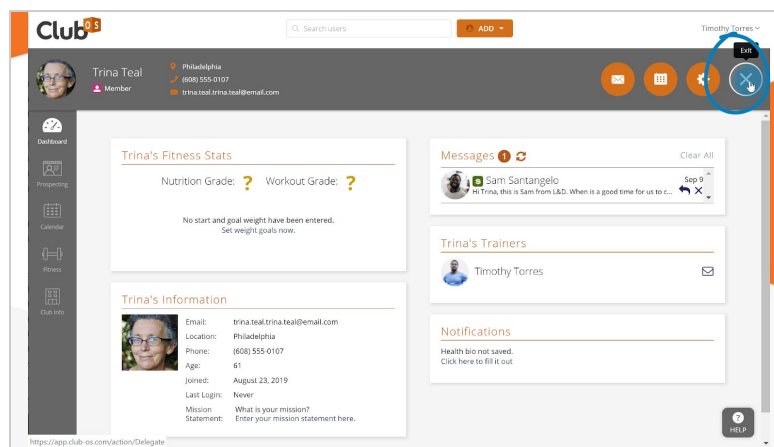

Viewing member profile data. Exit using the button on top right

- **Fitness:** Here's where Timothy can see his own fitness data. If he wanted to edit or update client fitness information, he could do that from within their profiles.

Club OS for Front Desk Staff

Last but not least, no gym or studio is complete without our trusty front desk staff. Front desk workers can use Club OS to input data from telephone or walk-in inquiries, pull up information when managers and club visitors need it, and help make sure records are up to date. This keeps the entire club running smoothly.
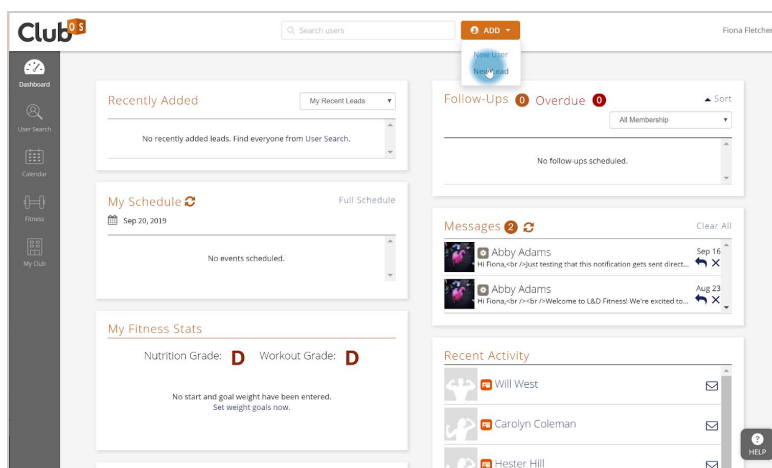
Fiona the Front Desk worker's dashboard,
showing the 'ADD' button for new prospects at the top of the screen

- **DGW:** The Digital Guest Waiver helps collect information about new visitors and prospective members. Many clubs keep the DGW pulled up on their computer or tablets so it's ready to go when new guests arrive.
- **Calendar:** Fiona may also need to use the calendar to schedule or reschedule guests.
- **User Search**: Fiona can also conduct a user search if she needs to find or update information for a coworker or gym visitor.

Specific **roles** and **permissions** can be customized for each gym or club. You will learn more about your own gym's setup as you start to use the system.

Part 5: Final Review

Let's review what we've learned:
- We located the **dashboard** and some important tools.
- We learned some **vocabulary** that you might come across in Club OS.
- And we talked about different **user roles** and the tools they use most often.

Club OS can do a lot more than we have covered here. **Don't worry, you're not alone!** We encourage you to check out our extensive help library or contact us as you get to know our platform.

Where to get help

1. **Inside the App:** If you have a question while you're using Club OS, the answer might be at your fingertips! Look for the **gray help button** on the **bottom right**. This will take you to a search box, links to helpful articles, and a direct contact to our help desk.
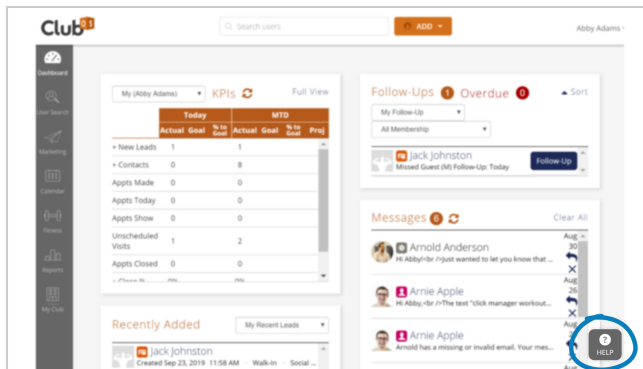
2. **Training Library:** Club OS' full library of help materials and training videos is available at help.club-os.com
3. **Ask your manager**: Your studio or club sets different permissions for different people. Depending on your role, you may be able to do some things and not others. If you can't find a particular tool or function you are looking for, check with your manager or the club admin. They can also help with your user account and other questions.
4. **Contact us:** You can also reach out to us directly for help. Contact support@club-os.com or go through the help desk to open a ticket.

We're so glad to have you on board! Welcome to Club OS!