Access VFP : vfpnext.com

The login information varies from gym to gym please ask the manager if it is not saved on the computer.

Important Buttons to Use:

Agenda: This is where the majority of the calls will be made from early on in the day

- **Past Due Tab**: Calls that were supposed to be done the previous days
- **Today Tab:** contains calls to be done that day
- **Tomorrow Tab**: Contains calls to be done the next day
- **Texts**: Show replies from who was texted back to us

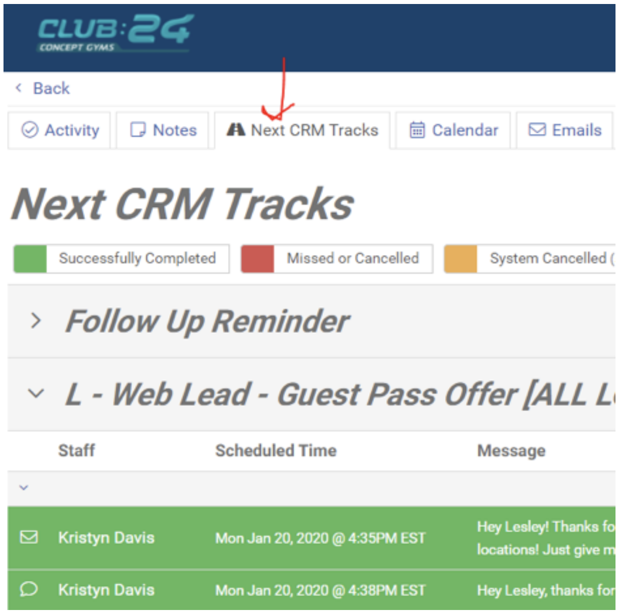
For all tabs it will consist of calls to former members, past due members, member follow up, Member engagement calls, prospect (guest) calls.

The Agenda & Pre-Designed Communication Tracks

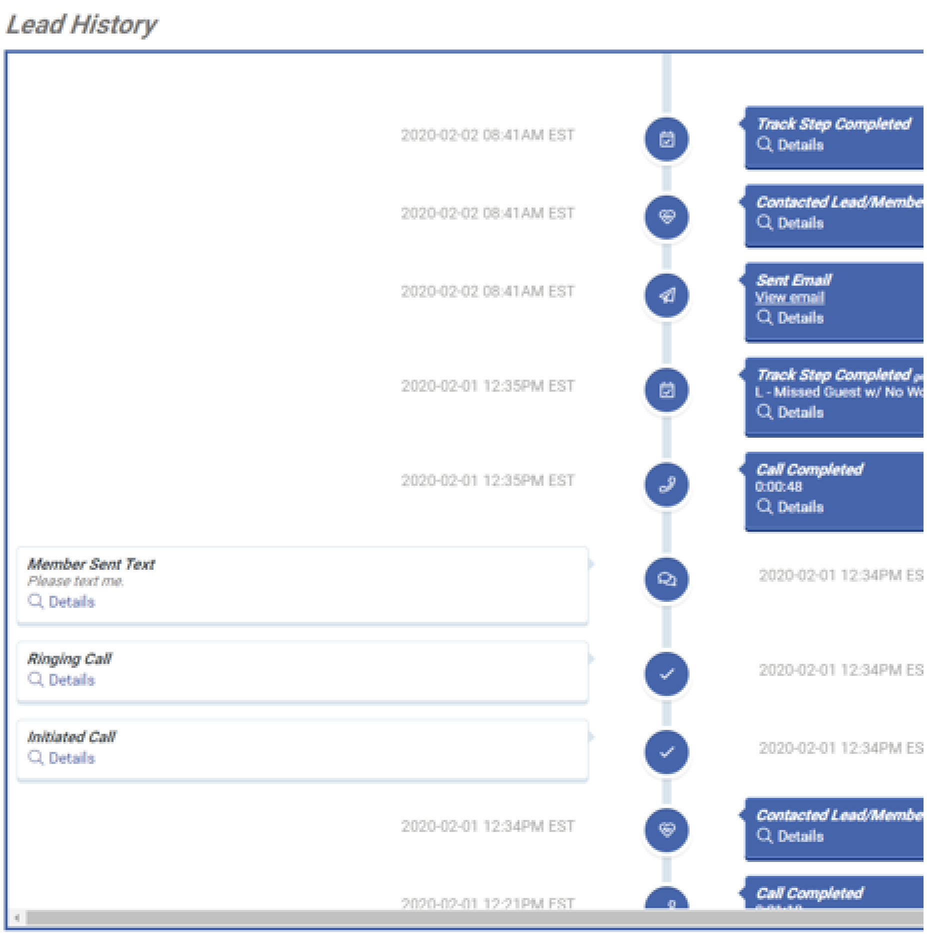
The Agenda is where carefully considered and timed actions are laid out in a Past Due, Today, and Tomorrow format. Stacked calls to a single individual on the Agenda will ALL be counted at once when you make a call to that person today - this is so you are not repeatedly calling the same person!

You should **pay *close* attention to the current communication track the individual is on**. You can see what track the individual is on from their activity on the Agenda:

...and from their individual record on the Next CRM Tracks tab:



You should also make it a habit to review the Activity History of the individual ***before*** making a call to them so you know whether or not it's appropriate to make another call. You can see this Activity History from the Agenda, **Lead History**:



... or from the individual's record, **Activity** tab:

Customized Messaging

Please reach out if you'd like more custom filters created for your Leads & Members page ***with the intention of assigning communication tracks*** to leads/members who are NOT currently on a communication track already. As much as we want to sell, sell, sell - as you can tell, potential members don't tend to like being hounded! **This is why using the Agenda and the carefully timed communication tracks is very important!**

My suggestion is to let me know what kind of calls you'd like to make, and let's see if we are already reaching out in that manner (such as, for feedback on their experience) - and maybe we can tweak an existing track! Feedback is typically sought in the communication tracks that KNOW a lead has been into the location because they've signed in via the Digital Guest Register - the system is that smart!

PRO TIP:

USE THE CALENDAR APPOINTMENTS!
Scheduling appointments for those who are willing to schedule an appointment (even if they're not sure they'll make it) increases the show-rate by a LARGE margin! Scheduling an appointment through VFPnext CRM *automatically* schedules confirmation messaging as well as reminder messaging before the appointment.

Scheduling an appointment through the system also allows the system to cater specifically to THEM when they register on the DGR, and show to that appointment! The language in the follow-up communication tracks asks them for their feedback, and *knows* they've been in but didn't purchase a membership, get assigned a guest pass, or schedule another appointment!

*Don't see an appointment type you would use regularly? Let me know and we can create CUSTOM appointment types AND custom communications built around that appointment type!

Training:

Last but not least, training. **If you have a single GM login and non-GM staff who have not been through training are using your login to access and utilize the system, let's schedule a STAFF training session to get all of your staff who are working within the system trained for the most efficient and effective use!** VFPnext does not charge per login, so - if desired - we can also set up a "front desk" login as well for staff to utilize, or each individual staff person can be tracked with accountability by having their very own logins - the Leaderboard report is fun to watch when that's the way staff are set up!