Course G-102: An Overview of iGo Figure
Part 3: Management

Sending an Email to All Members

Click **Reports** from the Main Menu. Select **Report Wizard** and **Create a Member Report**.

At Step 1, choose *Select All*:

At Step 2, make the selections as shown below:

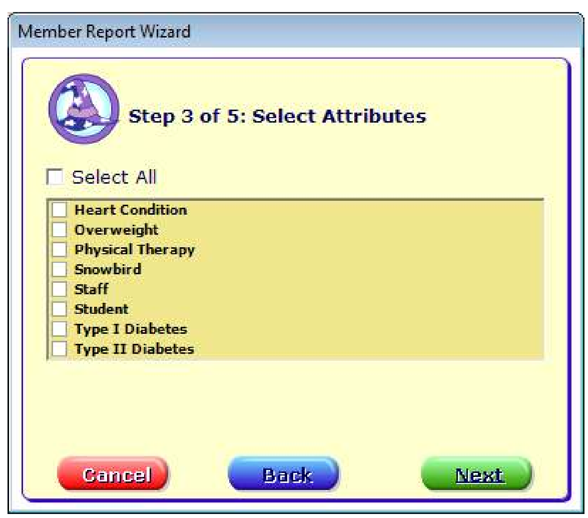
Do not check any boxes on Steps 3 and 4.

At Step 5, click **Email Now**:

Sending an Email Based on Attributes

Click **Reports** from the Main Menu. Select **Report Wizard** and **Create a Member Report**.

- At Step 1, Select All
- At Step 2, decide who should receive this email based on whether they are active, inactive, on hold, in collections, or archived.
- At Step 3, choose one or more attributes:



Useful tips:

- If you select two or more attributes, iGo Figure will include members with *any* of them (in other words, they don't need to have *all* the attributes to be included on the list – any one or more of them will do).
- The printed report will show exactly which attributes matched your search.
- Attributes are an *extremely* powerful feature which will allow you to better serve, and therefore retain, your membership base.

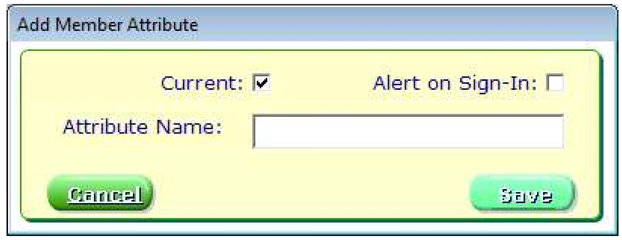
Attributes

Click **Member Attributes** on the More Options menu. You will see a list of Attributes, and how many members are assigned to each:

The Attributes you see above are just the system defaults. You can make inactive any attribute you do not wish to use just by unchecking its *Current* box.

You can also add a new Attribute by clicking the **Add a New Attribute** button at the bottom-center of the screen.

You will be prompted for information about the Attribute you are trying to create:



Checking the **Alert on Sign-In** box will cause a small red dot to appear next to any member's name who is scanning in, and has this Attribute assigned. (The dot appears next to their name on the Today's Attendance panel.)

Working with Attributes

On the *General* tab of any member's record, you will see their Attributes at the upper-right part of the screen:

Useful tips:

- To add or remove an Attribute, click the **Add/Remove** button. You will be able to select or deselect any Attributes you wish.
- Click on an Attribute itself to see the notes entered for that Attribute, and to determine whether or not it will flag on member keytag scan.
- You can see a report on the history of when Attributes were assigned and removed on the **History** tab.

Reports

To access reports, click **Reports** on the Main Menu.

Reports are organized into the six categories you see below on the left. When you click a category, the display at the right opens up into the reports available under that category:

Useful tips:

- There are close to 100 built-in reports.
- Most reports have filter conditions available. This means you effectively get *thousands* of different reports possible.
- Each report can be exported to Microsoft Excel, or tab-delimited (or CSV) output.

Here are a few reports that are especially useful:

- ***Member Reports > Top Losing Members*** – This reports helps you plan promotions, contents, or simply recognize top-performing members.
- ***Member Reports > Members Not Measured*** – Experience has consistently shown that members who are regularly weighed and measured achieve their goals, and do not cancel their membership. Use this report to help you identify those members who have not been weighed and measured recently.
- ***Attendance Reports > Invalid Keytag Scan*** – Every time a member scans in and their name appears in red on the Attendance panel, a note of that fact is made in this report. The member's name, membership, time, and other details are recorded. Very useful report for helping to catch repeat offenders.
- ***Attendance Reports > Members Not Attending*** – Contacting those members who have not attended recently helps keep them motivated, and therefore not cancelling a membership they do not use.
- ***Managements Reports > Memberships About to Expire*** – Offer renewal specials or reminders to members with memberships about to expire.
- ***Management Reports > Tax Report*** – One of the most detailed accounting-type reports available, and a great one to use if you are exporting data to an accounting software.
- ***Management Reports > Activity Audit Report*** – If you're using Advanced Security, this report will show you which employees went where in the software, when, and did what.
- ***Label Reports*** – Use any of the reports in this section to generate mailing labels for select group(s) of member(s), in order to better serve and communicate with them.
- ***Report Wizard*** – Use this section to either create a custom report, or the very useful Attendance/Staffing trends report.

Member No Sale

The Member No Sale feature is very powerful because it helps you predict your income, and set measurable goals.

- When a prospect physically walks into your facility, they are your guest, and they can leave one of two ways: as a new member, or as a lost sale.
- Lost sales are referred to as "No Sales," and tracking them can greatly aid you in

predicting your income, as well as setting measurable goals on your path to success.

How Member No Sales Work

- Every prospect who physically enters your facility is considered a guest. Your success in getting such prospects coming through the door is called Guest Production.
- The percentage of guests who sign up is called your Closing Average. The higher, the better.
- Your Guest Production times your Closing Average = your Total New Members.

Example: You have 100 guests in a month, and your Closing Average is 80%. You will have 80 new members that month.

Predicting Your Growth

Your Growth = your Total New Members minus your Attrition.

What is "Attrition"? Quite simply, it is the number of members you lose every month for various reasons (quit, moved, etc.).

- If your Attrition is greater than your Total New Members, you will have negative growth. In other words, you will have fewer and fewer members each new month.
- If your Attrition rate is equal to your Total New Members, you will have zero growth (your membership level will remain the same month after month).
- If your Attrition Rate is less than your Total New Members, then you will have positive growth. Your membership numbers will continue to rise each month.

The only way to grow your business is to have Total New Members each month be greater than your Attrition.

How iGo Figure Helps You

Each No Sale is entered on a simple form, reached by clicking **Member No-Sale** from the Main Menu, then clicking **Add No-Sale**:

- Because the No Sale's contact information is collected, it allows you future opportunities to turn them into a member.
- Because the Source information is collected, it allows you to see which advertising methods are effective.
- Because the Sales Person information is collected, it allows you to see the Closing Average of each individual employee (it is reported on each of their timesheets).
- Because the Reason for Not Joining information is collected, it allows you adjust your business accordingly (for example, if 80% of the people who do not join say it's for the reason of Limited Facility Hours, you know it's time to make a change).
- Finally, because you can enter detailed notes with each No Sale, it further allows you to increase your chances of turning them into a member sometime in the future.

Four Steps Toward Success

Here are four things you can immediately begin doing in your own business:

1. Look at the sales Closing Average for your facility as a whole, as well as for each employee on your staff, over the last few months.

   Now, set a goal for next month. Discuss each employee's goal with them. Figure out ways to help them reach it.

Hint: Assign your salespeople with the highest Closing Averages as a mentor for those with lower numbers.

2. Set a goal for your membership growth rate. Now, look at both your Attrition Rate and your New Member Sales. How are you going to make the numbers work out?

   Hint: You adjust your New Member Sales by changing either your Guest Production, or your Closing Average (or both).

   - To increase your Closing Average, do research on selling, sales skills, closing techniques, etc.
   - To increase your Guest Production, research advertising and marketing techniques.

3. Analyze your business' No Sales reasons over the last several months. What can you learn? Are the objections evenly spread out over all types? Or is there any one objection that turns up more frequently?

4. Contact previous No Sales to see if you can turn them into a member. Specifically target problems you have recently resolved (for example, if you recently increased your facility hours, definitely contact every previous No Sale who listed "Limited Facility Hours" as the reason for their objection).

Increasing your Growth is most-often accomplished by increasing Total New Members. But there is another very useful, often-overlooked option: *decreasing your Attrition*!

iGo Figure offers an attrition-fighting capability through our integrated partner, a worldwide leader in the field of Attrition Defense.

For more information, please simply send an email to training@igofigure.com with the subject line "Lower My Attrition."

Employee Records

Here is what iGo Figure will do for you in the area of Employee Records:

- Allows each employee to scan in and out using a built-in time clock, and keeps track of all hours worked.
- Multiplies total hours worked by hourly pay rate, in order to compute gross wages (automatically printed on timesheets).
- Computes commissions due on both membership sales and inventory sales, as appropriate. (Set commissions under the *Commissions* tab in *Business Defaults*.)
- Keeps track of every sale made by the employee, every lost sale, and computes their Closing Average.
- Keeps track of every inventory item sold by the employee.
- Allows every employee to have their own password, their own security profile, and keeps an audit log of where employees go in the software (only if Advanced Security is selected).

How to use Employee Records

- To access Employee Records, click **Employee Records** on the More Options menu.
- To add a new employee, click **Add New Employee**.
- To view a specific employee's record, click on their name.
- To remove an employee, click on their name in order to bring up their record, click **Edit**, then uncheck the *Current* box (it is on the first tab of the Employee's record, the *General* tab).
- To print employee timesheets, click **Print Time Sheet**. You will be prompted with a series of steps, including selecting a date range, and a list of employees to include in the report.
- To view a security audit log showing where your employees went in the software, click **Reports** on the Main Menu, and select *Management Reports* > *Activity Audit Report* (only if Advanced Security is selected).
- To select Advanced Security, click **Security** from the More Options Menu. Here you can select between Basic and Advanced security, as well as assign passwords to employees, set

their security profiles, and much, much more. Please either call for help, or review the other training materials available, regarding Security.

Seven Days and Seven Ways

There are seven great ways to get additional help, support and training from iGo Figure, and they are available to you seven days a week:

1. Tech Support Corner:

2. iLearning Center:

3. Online Chat – Click where it says “Operator Online” at the upper-right corner of our website at www.igofigure.com.

4. Email – Please go to our website at www.igofigure.com, select your country, then click *Contact Us*. You will see a list of email address for each of our departments.

5. Phone – The phone numbers for each of our departments are also listed on our website. Please see the comment above regarding selecting your location.

6. Webinars:

   You can sign-up for future live, interactive webinars, or you can watch recorded copies of previous webinars.

7. iCamps – Please make sure you are on our mailing list to be notified of upcoming iCamps. You can also view recordings of previous iCamps on our website.

Now that you are done with the *Overview of iGo Figure* course, we wish to leave you with the single most important piece of advice at this time.

The number one thing you can do to ensure successful operations with your iGo Figure software is to have your membership agreements correctly set up and configured.

Please be sure you take the time, and get the assistance, to ensure this step is completed successfully. Best wishes with your business!