

Release Notes

InTouch Follow-Up v5.10.0

Contents

1	Product Release Information.....	3
2	New Features.....	3
2.1	Club Activity Report (including Member Calls).....	3
2.2	Orientations Booked Status Report.....	5
3	Enhancements	6
3.1	New Order for Live Club Reports.....	6
3.2	Nightly Email contains the Club Activity Report (CAR)	6
3.3	Live Club Data matches Club Activity Report (CAR).....	7
3.4	Membership Sales Activity Report- Update and Date Range	8
3.5	Personal Training Sales Activity Report	8
3.6	Home Page Updated Dashboard Stats	9
3.7	Leads tab changes to Opportunities.....	9
3.8	Tour Now Changes to Drop-In Tour.....	10
3.9	New Link to Get Help from InTouch Support	10
4	Resolved Issues.....	11
4.1	Issue when Inbound SMS has space preceding first name.....	11
4.2	Facebook App Update	11

1 Product Release Information

Product	InTouch Follow-Up
Release number	5.10.0
Release date/details	April 11*, 2012 9pm PT (*Date is subject to change to April 17) Possible downtime of up to 30 min.
Contact	For more information, please contact support@intouchfollowup.com

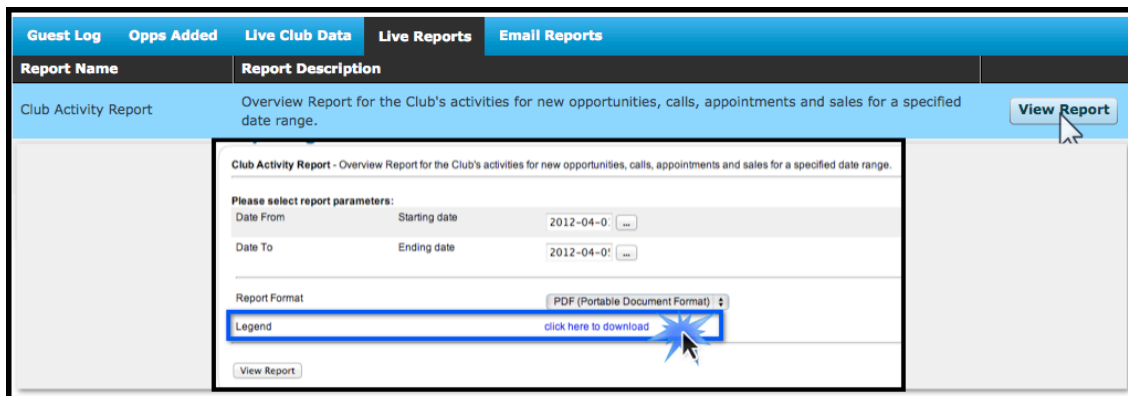
2 New Features

2.1 Club Activity Report (including Member Calls)

This new report will be a main focus for understanding your club's follow-up activity performance. We call it the "CAR" and it will truly help you drive your club performance (Excuse the pun!).

We recommend you join us at one of our online webinars to get a good understanding of what this report shows and how you can use it in your club. The webinar schedule can be found on our Support site [here](#).

The **Club Activity Report (CAR)** provides an overview of Lead and Member follow-up activity both scheduled and completed. A full legend for the report is available on our website support pages [here](#) and can also be found by accessing the link within InTouch when you run the report. See Screenshot below.



The CAR gives an overview of the following:

- Membership Opportunities Added - split into:
 - Leads added that are not Referrals or Walk-Ins
 - Referrals Added
 - Walk-ins Added
- Calls Made - split into:
 - Calls to Not Visited Leads/Guests
 - Calls to Missed Guests - Leads that visited but did not buy
 - Calls to Members
 - Calls to PT Leads
- Appointments
 - Sales Appointments Added on this date/date range
 - Sales Appointment Today- i.e. this sales appointment was scheduled to occur in this date range
- Guests for Memberships - leads who visited the club in this date range split into:
 - Showed-Up Sales Appointments
 - New Walk-Ins
 - Drop-In Guests/ Tour Now
 - Appointment closing percentage
- Sales Breakdown- percentage of total sales that are:
 - Sales from Leads that are not Referrals or Walk-Ins
 - Sales from Referrals
 - Sales from Walk-Ins
- Make Sale Stats shows how many new sales led to:
 - Referral Leads added
 - Orientations Booked

2.2 Orientations Booked Status Report

This new report allows you to export to a CSV file a list of Members who joined in the date period specified and will show whether they have had an Orientation appointment booked, the date of that appointment and whether they Showed Up (completed), Cancelled or have None Booked.

This report will help you see which members you need to contact to get booked in for an Orientation.

The report looks like this when opened in excel:

	A	B	C	D	E	F	G	H	I	J	K	L
	Member Owner	Appointment Created By	First Name	Last Name	Email	Mobile	Work Phone	Home Phone	Sold Date	Orientation Date	Orientation Time	Orientation Status
1	Ken Training	Claire Training	Diana	Foldi	d@f.com	(123) 123-1234	(123) 123-1234	(123) 123-1234	01/18/2012	03/07/2012	13:15:00	Scheduled
2	Claire Training	Claire Training	Yury	Callter		(123) 123-1235	(123) 123-1235	(123) 123-1235	01/23/2012	03/07/2012	12:30:00	Scheduled
3	Claire Training	Claire Training	Harry	Phoner		(123) 123-1236	(123) 123-1236	(123) 123-1236	01/23/2012	03/08/2012	12:00:00	Scheduled
4	Claire Training	Claire Training	Carol	Butler		(123) 123-1237	(123) 123-1237	(123) 123-1237	02/13/2012	03/07/2012	11:00:00	Scheduled
5	Claire Training	Claire Training	Opra	Winifred		(123) 123-1238	(123) 123-1238	(123) 123-1238	02/13/2012	03/07/2012	13:45:00	Scheduled
6	Claire Training		Yentl	Callter		(123) 123-1239	(123) 123-1239	(123) 123-1239	01/23/2012			None Booked
7	Claire Training		Lenny	Henry		(123) 123-1240	(123) 123-1240	(123) 123-1240	01/23/2012			None Booked
8	Claire Training		Frank	Incense		(123) 123-1241	(123) 123-1241	(123) 123-1241	01/23/2012			None Booked
9	Claire Training		Darren	Butler		(123) 123-1242	(123) 123-1242	(123) 123-1242	02/13/2012			None Booked
10	Claire Training		Claire	Walker		(123) 123-1243	(123) 123-1243	(123) 123-1243	02/21/2012			None Booked
11	Frank Front	Claire Training	Dubby	Clicker		(123) 123-1244	(123) 123-1244	(123) 123-1244	02/15/2012	03/06/2012	11:30:00	Completed
12	Demo Administrator	Claire Training	Jonny	Brown		(111) 222-3333	(111) 222-3333	(111) 222-3333	03/06/2012	03/06/2012	11:30:00	Completed
13	Claire Training	Mary Manager	Gerry	Walker		(111) 222-3333	(111) 222-3333	(111) 222-3333	01/18/2012	01/18/2012	13:00:00	Cancelled

You can find the report in Live Reports near the bottom of the list:

Calendar	Agenda	Leads	Members	Follow-Up	Reports	Admin
Guest Log	Leads Added	Live Club Data	Live Reports	Email Reports		
Report Name	Report Description					
Contact Methods for New Membership Leads Report	Shows Leads Created in the selected time frame and leads that were won out of them regardless of when they were won				View Report	
Membership Sales based on Contact Methods Report	Shows all Leads Won in the selected time frame regardless of created date				View Report	
Lead Source Sales Report	Shows membership sales based on lead sources				View Report	
Lead Source Lead Report	Shows what lead sources are being effective				View Report	
Not Interested Reasons Report	A report of all the reasons why a lead was marked as "Not Interested" per Lead owner				View Report	
Won Lead Export Report (CSV)	Export all the won leads for a date range to a CSV file				View Report	
Active Lead Export Report (CSV)	Export all leads (except won) for a date range to a CSV file				View Report	
ALL Leads Status Report (CSV)	Export All leads (Active and Won) that were created and/or whose status change date is within the date parameter.				View Report	
Scheduled Events Status Report (CSV)	A list of all leads with a scheduled appointment in this date range and the current status of that appointment.				View Report	
Orientations Booked Status Report (CSV)	A list of the orientation statuses of members according to sold date				View Report	

3 Enhancements

3.1 New Order for Live Club Reports

The Live Club Reports are now sorted in a new order with most useful/popular reports at the top of the list so they are easier for you to find.

Report Name	Report Description	View Report
Club Activity Report	Overview Report for the Club's activities for new opportunities, calls, appointments and sales for a specified date range.	View Report
Membership Sales Activity Report	Detailed Activity Report for Membership Sales for a specified date range.	View Report
Game Play - Lead Activity	Each staff member's activities are ranked against other staff. Staff earn points based on the value of the Sales Activities they complete	View Report
PT Sales Activity Report	PT Sales Activity Report for a specified date range	View Report
Orientation Show Rate, Orientation PT Sales and Total	Shows Orientation Show Rate, Orientation PT Sales and Total PT Purchases	View Report
Membership and PT Sales and Orientations Booked Report	Shows PT Sales and Orientations Booked for Membership Sales	View Report
Referral - Members Who Referred New Members	Lists each new member, how many referrals they gave and how many of their referrals have signed up	View Report
Referral - Leads That Joined	Lists each referral who signed up, and how long it took to get them signed up	View Report
Contact Methods for New Membership Leads Report	Shows Leads Created in the selected time frame and leads that were won out of them regardless of when they were won	View Report

3.2 Nightly Email contains the Club Activity Report (CAR)

Membership Opps Added	04	Apr
Opportunities Added	19.0	30.0
Leads Added	0	3
Referrals Added	15	21
Walk-Ins Added	4.0	6.0
Calls Made	04	Apr
Total Calls	23	52
Calls to Not Visited Guest	65%	65%
Calls to Missed Guest	17%	19%
Calls to Members	13%	13%
Calls to PT Leads	4%	2%
Added & Today's Appt	04	Apr
Sales Appt Added	7.0	14.0
Sales Appt's Today	10.0	19.0
Guests for Memberships	04	Apr
Total Guests	17.0	29.0
Showed-Up Sales Appt	10.0	18.0
New Walk-Ins	4	6
Drop-In Guests	3.0	5.0
Sales Break Down	04	Apr
Closing Percentage	53%	45%
Total Sales	10.0	14.0
Leads	6.0	10.0
Referrals	1.0	1.0
Walk-Ins	3.0	3.0
Make Sale	04	Apr
Referrals Added/Sale	1.0	1.0
Orientations Booked	20%	36%

Legend: [click here to download](#)

2 attachments — [Download all attachments](#)

- [dailyMembershipSalesActivityReport-1499.pdf](#)
BK [View](#) [Download](#)
- [monthlyMembershipSalesActivityReport-1499.pdf](#)
BK [View](#) [Download](#)

The nightly email has been updated to reflect the data shown in the CAR above with your daily and monthly Membership Sales Activity Report as attachments. For those wanting to drill down to detailed Membership Sales stats, the Membership Sales Activity (MSA) report can still be run from within InTouch Live Reports tab.

3.3 Live Club Data matches Club Activity Report (CAR)

The Live Club Data has been updated to reflect the data shown in the CAR above and matches your nightly email report. For those wanting to drill down to detailed Membership Sales stats, the Membership Sales Activity (MSA) report can still be run from within the InTouch Live Reports tab.

Guest Log	Opps Added	Live Club Data	Live Reports	Email Reports
Membership Opps Added		Today	Yesterday	April
Opportunities Added		19	0	30
Leads Added		0	0	3
Referrals Added		15	0	21
Walk-Ins Added		4	0	6
Calls Made		Today	Yesterday	April
Total Calls		23	5	52
Calls to Not Visited Guest		65%	40%	65%
Calls to Missed Guest		17%	60%	19%
Calls to Members		13%	0%	13%
Calls to PT Leads		4%	0%	2%
Added & Today's Appt		Today	Yesterday	April
Sales Appt Added		7	2	14
Sales Appt's Today		10	4	19
Guests for Memberships		Today	Yesterday	April
Total Guests		17	4	29
Showed-Up Sales Appt		10	4	18
New Walk-Ins		4	0	6
Drop-In Guests		3	0	5
Sales Break Down		Today	Yesterday	April
Closing Percentage		47%	50%	41%
Total Sales		9	2	13
Leads		6	2	10
Referrals		1	0	1
Walk-Ins		2	0	2
Make Sale		Today	Yesterday	April
Referrals Added/Sale		1.7	0	1.6
Orientations Booked		22%	50%	38%

3.4 Membership Sales Activity Report- Update and Date Range

This has been updated to be consistent with the CAR above.

The report can now be run for a specified date range and so only appears as a single report in the report list. Input a Date From and a Date To field to run this for a single date or a full month to date or a full month. The date range is limited to a maximum 3 month range.

Definitions for the columns can be found in the MSA Legend available [here](#).

Reporting

Membership Sales Activity Report - Detailed Activity Report for Membership Sales for a specified date range

Please select report parameters:

Date From	Starting date	2012-04-01	...
Date To	Ending date	2012-04-01	...

Report Format: PDF (Portable Document Format) ▾

Legend [click here to download](#)

Membership Sales Activity Report					
Club: InTouch Athletic Club					
Date: April 01, 2012 To April 04, 2012					
Name	New Opportunities			Calls For Opportunities	Calls Cancelled
	Leads Added	Referrals Added	Walk-in's Added		
Casey Cline	0.0	3.0	0.0	3.0	2.0
Melissa Manager	3.0	18.0	6.0	46.0	6.0
Tina Trainer	0.0	0.0	0.0	0.0	0.0
Total	3.0	21.0	6.0	49.0	8.0

Report Generated On April 04, 2012

3.5 Personal Training Sales Activity Report

This has been updated to be consistent with the MSA above. Definitions for the columns can be found in the PTSA Legend available [here](#).

3.6 Home Page Updated Dashboard Stats

The stats shown on the Home Page for My Agenda, incoming leads to be assigned and My [Month] Opportunities (previously Leads) have been updated to reflect changes to the CAR and MSA reports above. Note that Total club membership sales and leads no longer show here and can be found in Live Club Data on the report tab only.

My Agenda				
Today's Appointments				
	Open	Showed-Up	Canceled	Overdue
	3	4	0	0
Today's Calls				
	Open	Made	Canceled	Overdue
	16	22	1	3
Today's Tasks				
	Open	Completed	Canceled	Overdue
	1	0	0	0
Incoming Leads To Be Assigned				
	Website	Facebook	Text	
	0	0	0	
My April Opportunities				
	Leads	Referrals	Walk-Ins	Sales
	3	6	2	3

3.7 Leads tab changes to Opportunities

The Leads tab has been renamed Opportunities. Opportunities reflects an umbrella term for all Walk-Ins, Member Referrals and all other Lead types that are generated in your club.

INTOUCH							Help	My /
Home	Calendar	Agenda	Opportunities	Members	Follow-Up	Reports		
SEARCH		Memberships	Personal Training	Sales	Leads added In			
Name		Added	Owner	Last Contact	What's Next			

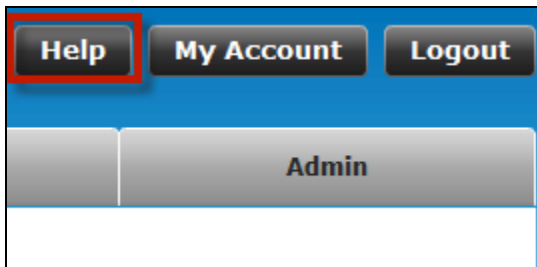
3.8 Tour Now Changes to Drop-In Tour

The Tour Now tick box has been renamed to Drop-In Tour. Some users did not understand the term Tour Now and felt Drop-In Tour explained this situation better.

A Drop-In Tour is a lead who already exists in InTouch and who arrives for a club tour without having pre-booked a tour.

3.9 New Link to Get Help from InTouch Support

Click on the Help button on the top right of your screen to access our online support pages or find out how to contact support@InTouchFollowUp.com.



4 Resolved Issues

4.1 Issue when Inbound SMS has space preceding first name

Fixes an issue where when a potential new lead texted their name in to your SMS number (e.g. Text in to win a free workout) but put a space before their first name the new lead record was created with no first name and the full name in the last name field.

4.2 Facebook App Update

A number of new customers were having issues with the Facebook app that allows them to capture leads on their Facebook page and input this directly into InTouch. This was due to some changes that Facebook had made that prevented new users from installing our app. A new app has been launched and the document for installing the Facebook app can be found [here](#).

Current Facebook app users should not have to take any action as your Facebook app will automatically be upgraded.