

Release Notes

InTouch Follow-Up v5.8.0

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1 Product Release Information

Product	InTouch Follow-Up
Release number	5.8.0
Release date/details	December 14, 2011 9pm PT Possible downtime of up to 30 min
Contact	For more information, please contact support@intouchfollowup.com

2 New Features

2.1 Reports - New ALL Leads CSV Export Report

This report is similar to the current Active Leads CSV export and Won Leads CSV report - it shows ALL LEADS exported to a CSV file so you can open it in excel and sort or filter or mail merge the data to suit your needs.

2.2 Reports - New Not Interested Reason Report

In version 5.7.0 we gave you the ability to start capturing the reasons why leads were being marked as Not Interested. As promised this release brings you a report to see what reasons are being recorded by each Lead Owner as follows: -

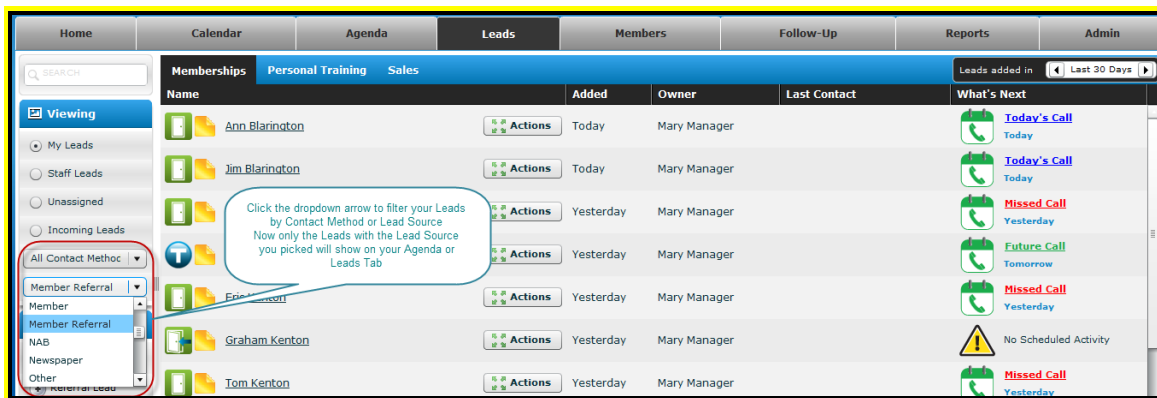
Not Interested Reasons Report				
Club: San Jose				
For December 09, 2011				
	Facilities	Joined Another Club	Too Expensive	Total
Charlie Brown	1	1	1	3
Club Total	1	1	1	3

Report Generated On December 09, 2011

2.3 Filters Agenda and Leads Tab by Lead Source & Contact Method

Some users have requested the ability to filter all their leads on their agenda or leads tab by contact method or lead source so that they can prioritise calls to a particular Lead Source for example a 12 days of Christmas campaign where to need to call everyone before Christmas.

This feature introduces two new drop down filters in the left hand menu -click on the dropdown arrow and pick one of the Lead Sources and only the leads with that lead source will be displayed on your screen.



The screenshot shows the Intouch software interface with the 'Leads' tab selected. The left-hand menu has a 'Viewing' section with a dropdown menu for 'All Contact Method'. The dropdown menu is open, showing options: Member Referral, Member, Member Referral, NAB, Newspaper, and Other. A callout box points to the dropdown menu with the text: 'Click the dropdown arrow to filter your Leads by Contact Method or Lead Source. Now only the Leads with the Lead Source you picked will show on your Agenda or Leads Tab'. The main table displays a list of leads with columns: Name, Added, Owner, Last Contact, and What's Next. The table contains several rows of lead data, including names like Ann Blarington, Jim Blarington, and Graham Kenton.

Name	Added	Owner	Last Contact	What's Next
Ann Blarington	Today	Mary Manager		Today's Call Today
Jim Blarington	Today	Mary Manager		Today's Call Today
	Yesterday	Mary Manager		Missed Call Yesterday
	Yesterday	Mary Manager		Future Call Tomorrow
	Yesterday	Mary Manager		Missed Call Yesterday
Graham Kenton	Yesterday	Mary Manager		No Scheduled Activity
Tom Kenton	Yesterday	Mary Manager		Missed Call Yesterday

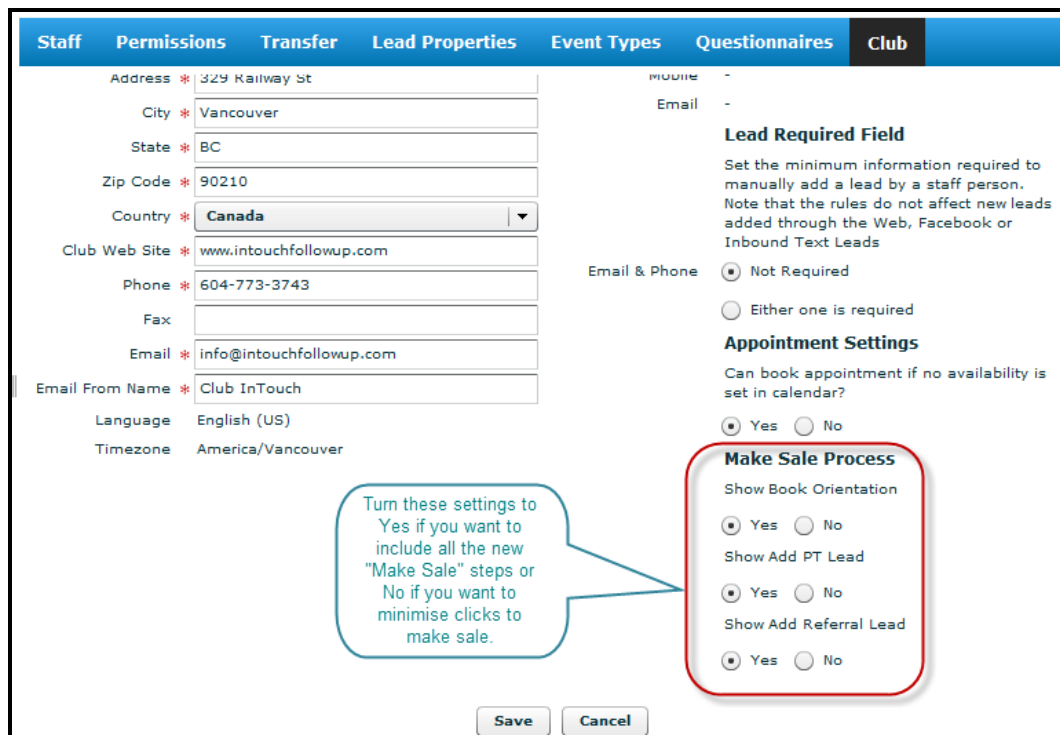
3 Enhancements

3.1 New Make Sale Process

Based on feedback from a number of visits to clubs who are using InTouch we have enhanced the Make Sale process to achieve the following objectives: -

1. Make it more Intuitive and easier to step through step by step rather than present one large screen of fields to complete.
2. Encourage Sales people to book an orientation for a new member at time of sale so you get more members started at the club.
3. Encourage Sales people to get Personal Training Leads or Sell PT at time of sale so you get more PT Leads and sales.
4. Encourage Sales people to ask for new Lead referrals from new member at time of sale so you get more member referral leads and increase your sales.
5. Steps 2-3 above can be turned ON/OFF for a club in the club permissions within admin.

First set- up your Permissions - Go To Admin -> Club and click Edit



The screenshot shows the 'Club' settings page in the InTouch admin interface. The page has a blue header with tabs for Staff, Permissions, Transfer, Lead Properties, Event Types, Questionnaires, and Club. The Club tab is selected. The main content area is divided into two columns. The left column contains various club details such as Address, City, State, Zip Code, Country, Club Web Site, Phone, Fax, Email, Email From Name, Language, and Timezone. The right column contains settings for Lead Required Field, Appointment Settings, and Make Sale Process. The Make Sale Process section is highlighted with a red box and contains three options: Show Book Orientation, Show Add PT Lead, and Show Add Referral Lead, each with Yes and No radio buttons. A callout bubble points to these settings with the text: 'Turn these settings to Yes if you want to include all the new "Make Sale" steps or No if you want to minimise clicks to make sale.' At the bottom of the form are Save and Cancel buttons.

Step 1 - Click Make Sale anywhere in the application and this window will pop up.

Make Sale

T Christine Jones Member Referral/Member Referral

- History
- Guest Co...
- Telephon...
- Lead
- Contact

First Name * Christine

Last Name * Jones

Mobile (123) 123-1234

Home Phone

Work Phone

Email hh@hh.com

Company

Date of Birth MM DD YYYY MM/DD/YYYY

SSN

Gender Male Female

Address

City

State

Zip Code

Country Canada

Other options

Cancel Sale


Make Sale


Step 1
Complete the rest
of the new
members contact
details here

Click Make Sale


Step 2 - Assign a Retention Follow Up owner to the new member (this used to be called Member Owner). The staff member assigned will be responsible for making retention calls to the member that you have scheduled in your member follow up.

Follow-Up

Christine Jones
Moved from Lead to Member 

Referral Sales Follow-Up
Follow-Up: Mary Manager 

Retention Follow-Up
Follow-Up *




 **Next**

New Name for Member Owner/Member Follow-Up


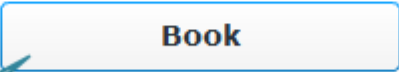
If you have permission set to NO then this is the last step but if any permissions are set to YES you will proceed to the relevant steps below.


Step 3- Book an Orientation Appointment

Follow-Up

Christine Jones Moved from Lead to Member	
Referral Sales Follow-Up Follow-Up: Mary Manager	
Retention Follow-Up Follow-Up: Jen Trainer	


Orientation


 





Step 4- Add a Personal Training Lead or Sell Personal Training

Follow-Up


Christine Jones
Moved from Lead to Member 

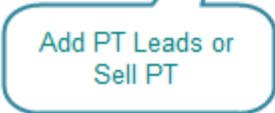
Referral Sales Follow-Up
Follow-Up: Mary Manager 

Retention Follow-Up
Follow-Up: Jen Trainer 

Orientation appointment booked
With: Jen Trainer
On: Dec 10, 2011
at: 2:45 PM 





Personal Training Lead





Step 5- Assign a Personal Trainer to follow up a PT Lead or PT Sold.

Follow-Up


Christine Jones Moved from Lead to Member	
Referral Sales Follow-Up Follow-Up: Mary Manager	
Retention Follow-Up Follow-Up: Jen Trainer	
Orientation appointment booked With: Jen Trainer On: Dec 10, 2011 at: 2:45 PM	


Personal Training Follow-Up


Follow-Up *


Step 6- Ask the new member for referrals- click Add Referral


Follow-Up

Christine Jones
Moved from Lead to Member 

Referral Sales Follow-Up
Follow-Up: Mary Manager 

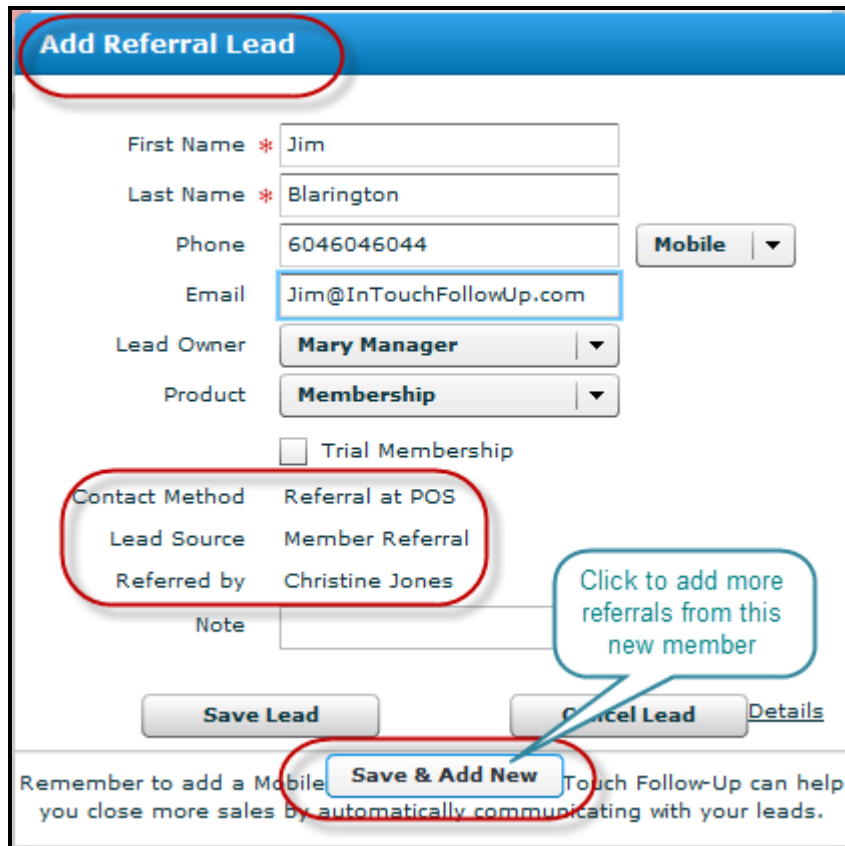
Retention Follow-Up
Follow-Up: Jen Trainer 

Orientation appointment booked
With: Jen Trainer
On: Dec 10, 2011
at: 2:45 PM 

Personal Training Lead
Follow-Up: Jen Trainer 

Referral Lead

Step 7- The Add referral lead screen pops up and already has the Contact method and Lead source set so all you have to do is add the new lead's name, phone number and/or email address. Once you have entered those details then: -



The screenshot shows the 'Add Referral Lead' form with the following fields and values:

- First Name ***: Jim
- Last Name ***: Blarington
- Phone**: 6046046044
- Mobile**: Mobile (dropdown menu)
- Email**: Jim@InTouchFollowUp.com
- Lead Owner**: Mary Manager (dropdown menu)
- Product**: Membership (dropdown menu)
- Trial Membership
- Contact Method**: Referral at POS
- Lead Source**: Member Referral
- Referred by**: Christine Jones
- Note**: (empty text area)

Buttons at the bottom: Save Lead, Cancel Lead, **Save & Add New** (circled in red), and Details.







A callout box points to the 'Save & Add New' button with the text: "Click to add more referrals from this new member".

Footer text: "Remember to add a Mobile Touch Follow-Up can help you close more sales by automatically communicating with your leads."


- If there are no leads simply click "Cancel lead"
- If there are multiple leads click "Save & Add New"
- If there is just one Lead referral click "Save"

Step 8 - Confirmation appears of your completed sale and all the activity captured for this new member

Follow-Up

Christine Jones Moved from Lead to Member	
Referral Sales Follow-Up Follow-Up: Mary Manager	
Retention Follow-Up Follow-Up: Jen Trainer	
Orientation appointment booked With: Jen Trainer On: Dec 10, 2011 at: 2:45 PM	
Personal Training Lead Follow-Up: Jen Trainer	
Referral Lead 2 Referral Leads added	

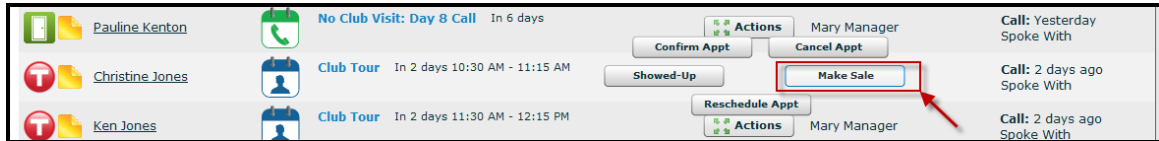
Great Result!

 **Finished**

Remember: If you have permission set to NO then this process is a 2 step process. However if you want your team to be reminded to complete ALL the steps above then set your permissions to YES. (See [here](#) for how to set these)

3.2 New Make Sale button on Appointment Actions button

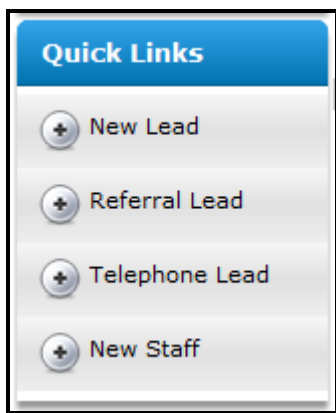
We had feedback from users that they would like to be able to click Make Sale directly from the agenda for appointments scheduled on their agenda. so we have added the Make Sale button to the Actions button on the Agenda as seen below.



3.3 Walk-In Sale button removed


The Walk-in sale button has been removed as the feedback we received is that this was confusing to many of our users.


To add a Walk-in sale now complete the following steps:-





- Click "+New Lead" and Add the Lead With a Contact Method = Walk-In
- Click Save and the Follow Up window appears as shown below
- Click Make Sale

Follow-Up

What's Next for  **Johnny Walker**


 **Visited Club: Day 2 Call**
Dec 10, 2011 [Reschedule Call](#)

 No scheduled appointment [Schedule Appt](#)

 No scheduled task [Create Task](#)

Other lead options

[Make Sale](#) [Move to Trial](#) [Not Interested](#) [Call Now](#)





 [Continue](#)

Now Follow the steps shown in the [Make Sale](#) process shown [above](#).




3.4 Rename Follow-up events to match Make Sale process

As you can see from the above Make Sale process we renamed some of the steps such as renaming Member Follow Up as Retention Follow Up. This is because we heard from our users that they were confused what Member follow up means and what the difference was between this and Sales Follow-up calls. So here are the new names for Follow-up events: -

Retention Follow-up - Used to be called Member Follow Up - this is when a trainer or retention manager calls or emails a new member to ensure they are getting started with using the club.

Memberships Personal Training Members		
Name	Status	Action
 PT Appointment Alert	Off	Edit
 Email All Members	Off	Edit
 Retention Follow-Up: Day 1 Call	On	Edit
 Retention Follow-Up: Day 1 Email	Off	Edit

Referral Follow-up - Used to be called Sales Follow Up - this is when a sales person calls the new member up to check they are happy with their purchase and are using the club but mainly to ask for referral leads.

Memberships Personal Training Members		
Name	Status	Action
 Referral Sales Follow-Up: Day 1 Call	On	Edit
 Referral Sales Follow-Up: Day 2 Email	Off	Edit
 Referral Sales Follow-Up Day 3 Call	Off	Edit
 Referral Sales Follow-Up: Day 8 Call	Off	Edit
 Referral Sales Follow-Up: Day 365 Call	Off	Edit

No Club Visits
 Visited Club
 Trials
 Expired Trials
 Referral Sales Follow-Up
 Other

4 Resolved Issues

4.1 Prevent Multiple Clicks of Save Lead buttons

Some users were double clicking save buttons resulting in duplicate leads being added to the database. This fix aims to resolve this issue.

4.2 Permissions fixed for Appointment Settings with No availability

Fixes the issue where Club permissions for Appointment Settings - "Can book appointment if no availability is set in calendar?" were set to Yes/No but behaved in the same way.

Now when these are set to: -

- Yes- appointments can be scheduled even if user has not set up their schedule in calendar
- No- appointments can ONLY be scheduled IF user has set up their schedule in calendar