

InTouch Sales Training Guide

(Oct 2012 – v 5.14)

Contents

Product Overview	4
What is InTouch Follow-Up?	4
Why Use InTouch Follow-Up?	4
Homepage	5
Agenda.....	6
Agenda: Icons, Buttons and Columns.....	6
Events.....	6
Lifecycle	6
History.....	7
Action Button	7
Last Contact Column	8
Overdue Items.....	8
Phone Calls	9
Make a Phone Call	9
Reschedule a Phone Call	10
Cancel a Phone Call.....	10
Make a Call and Book a Tour	11
Appointments.....	12
Confirm an Appointment	12
Complete an Appointment	12
Move Someone to a Trial.....	13
Mark Someone as Not Interested	13
Return a Lead to Interested Status	13
Make Sale	14
Drop-Ins.....	15
Adding New Leads	16
Search.....	16
Add a New Lead (general)	16
Add a Member Referral lead	18
Add a Telephone Lead (TI).....	19
Guest Log	21
Guest Log: Opps (Opportunities) Added	21

Follow-Up	22
Follow-Up by Lead Type and Lifecycle Groups	22
Follow-Up Examples	23
Calendar	24
Calendar Views	24
To Set Your Schedule	24
Group Calendars	25
Block Your Calendar	25
Where to Get Support	26

Product Overview

What is InTouch Follow-Up?

InTouch Follow-Up is a web-based Communication Management system specifically built for health clubs, which guarantees every lead and member receives the minimum of 7-11 points of contact and follow-up! Unlike paper-based and club management systems that rely too much on people to communicate and schedule follow-up activities, Follow-Up increases staff efficiency and takes out human error by automatically sending out branded emails, text messages and scheduling staff follow-up calls and activities.

Why Use InTouch Follow-Up?

Never miss a follow-up call and simply make more calls!

No follow-up is ever missed due to busy staff or human error. The Call Scheduler automatically schedules follow-up calls for leads and members based on a variety of touch points including lead age, lead status and the completion of certain actions or events.

Automatic Emails

Emails are branded to your club and communicate what sets you apart from all the other clubs. The emails are customizable and automatically sent to leads and members based on where they are in the sales process.

10% to 35% Increase in Club Tour Attendance!

SMS Text reminders are automatically sent directly to leads mobile phones with details of their upcoming Club Tour Appointment. Through real world data we have proven a club tour attendance rate increase of 10% to over 35%.

Generate More Leads and Then Close Them!

Follow-Up helps you both generate additional and then centralize all of your leads. Leads instantly enter the InTouch Communication Cycle and begin the automatic follow-up process.

Next Lead or Member Activity is always defined

As a manager, know all the lead, member, or personal training phone calls that staff need to make during the day. Determine what calls or tasks that have they missed and need immediate follow-up. Staff will see all of this as well when they log into InTouch.

Activity Tracking

InTouch enables you to easily define your lead and member engagements, ensures that the schedule is followed by tracking your staff through various channels, and by holding them accountable on many levels.

Homepage

The Homepage is your starting point when using InTouch. It provides a real-time snapshot of:

- My Agenda: Appointments, calls and tasks scheduled for the day
- Incoming Leads to be Assigned from your Club's Website, Facebook page, and inbound text messages
- My [Month] Opportunities: New Leads, Referrals, and Walk-Ins entered plus your sales for the current month
- What's Happening: A staff message board

The screenshot shows the InTouch homepage dashboard with the following sections:

- Navigation Tabs:** Home, Calendar, Agenda, Opportunities, Members, Follow-Up, Reports
- Quick Links:** New Lead, Referral Lead, Telephone Lead
- My Agenda:**
 - Today's Appointments:**

Open	Shown-Up	Canceled	Overdue
3	2	1	0
 - Today's Calls:**

Open	Made	Canceled	Overdue
9	21	3	6
 - Today's Tasks:**

Open	Completed	Canceled	Overdue
1	2	0	0
- Incoming Leads To Be Assigned:**

Website	Facebook	Text
0	0	0
- My April Opportunities:**

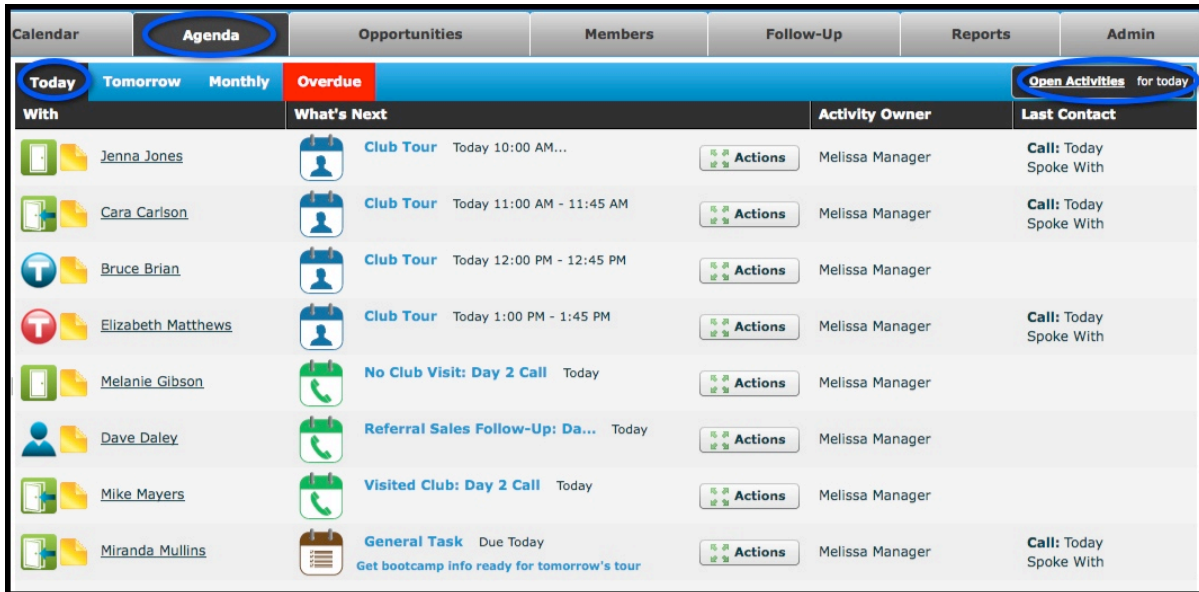
Leads	Referrals	Walk-Ins	Sales
10	23	10	25
- What's Happening?**
 - share your good news...
 - All 0 Unread
 - Melissa Manager:** Everyone is on target to meet mid-month goals - keep up the good work :)
Apr 9, 2012 1:23 PM to All Staff
 - Katie Smith:** I love this system! I'm getting so many more sales!
Apr 6, 2012 7:16 PM to All Staff
 - Melissa Manager:** Don't forget - Open House on Saturday 12-6 - Call all your leads and tell them to bring their ...
Apr 3, 2012 4:35 PM to All Staff
 - Melissa Manager:** Great Day Today!
Apr 2, 2012 7:02 PM to Casey Cline
 - Melissa Manager:** Closeout time! Let's do this!
Mar 30, 2012 11:13 AM to All Staff
 - Melissa Manager:**

Agenda

After reviewing the Homepage, the Agenda is where you will spend most of your day in InTouch. This is where you will work through phone calls, appointments, tasks, and most importantly closing sales!

To view items on the Agenda:

1. Click the Agenda Tab
2. The Agenda screen defaults to Open Activities for today



Agenda: Icons, Buttons and Columns

Events

These icons represent appointments, calls and tasks:



The blue calendar icon represents a scheduled appointment



The green telephone icon represents a scheduled phone call



The brown clipboard represents a scheduled task (any reminder you wish to create)

Lifecycle

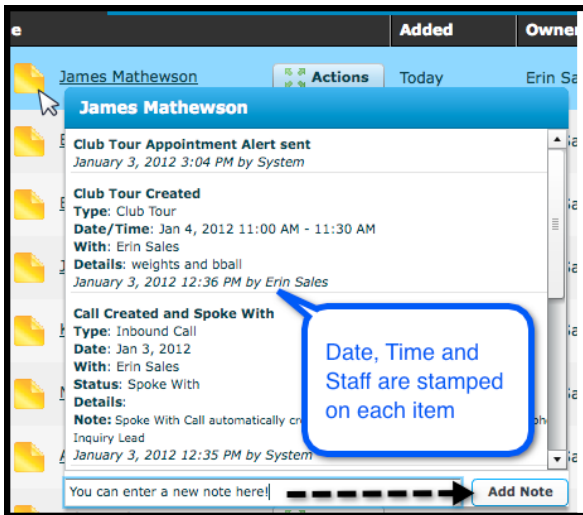
- These icons represent the status of the Lead or Member (Visited Club, No Club Visits, Member, Personal Training, Not Interested, Deleted and Sale). You can move your cursor over the icon for it's meaning.
- A legend can also be found at the bottom of the Opportunities Tab screen
- Each lifecycle has it's own set of Follow-Up items (see Follow-Up section)



History

The yellow sticky note icon displays a history of the Lead or Member and provides the option to quickly enter additional information about the Lead or Member.

- All items are stamped with the date, time and staff person
- Automatic items (ie: calls, alerts, and emails) are listed 'by System'
- Every item is recorded under a person's history. Ie: Scheduled calls and their status (open, called-spoke with, called-left message, cancelled, etc), SMS text message reminder (Alert) sent

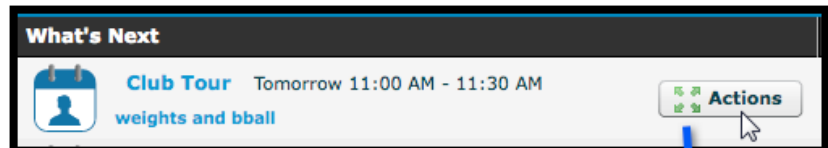


Action Button

The Action button will give you all the appropriate choices for that event or person. You will see the Action button throughout many tabs, not just the Agenda. It's how you will complete tours, make calls, create PT leads, and much more. To use the Action button, move your cursor over the button and a number of choices will appear.

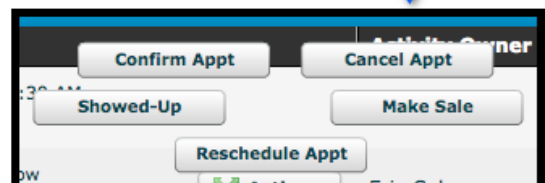
Appointment options are:

- Showed-Up
- Reschedule Appt
- Cancel Appt
- Confirm Appt
- Make Sale



Call options are:

- Make Call
- Reschedule call
- Cancel call



Task options are:

- Complete Task
- Reschedule Task
- Cancel Task

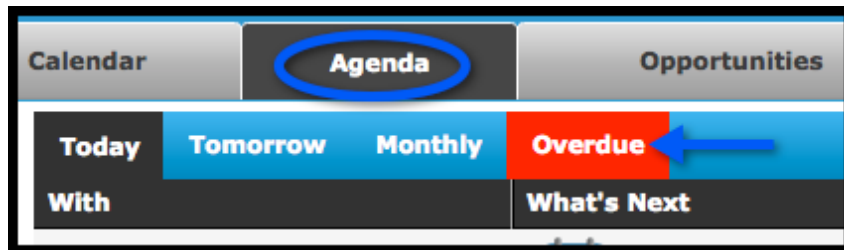
Last Contact Column

This column allows you to quickly see the last contact made with this lead. Methods of contact listed in this column include phone calls and appointments.

Last Contact
Call: Yesterday Spoke With
Call: Yesterday Spoke With
Call: Yesterday Spoke With
Club Tour: Yesterday Showed-Up
Call: Yesterday Left Message

Overdue Items

Items that are not marked as completed or cancelled (or not rescheduled) from previous days will be listed in the red Overdue tab. This tab will only appear if past due items are present. Items will remain under this tab for 7 days and then automatically close by the InTouch System.



Phone Calls

In this section, we will review how to make calls on the Agenda

Make a Phone Call

EXAMPLE: From the Agenda Tab, make a phone call and add a note

1. Move cursor over the Action button
2. Click Make Call
3. Move cursor over the next Action button and click the appropriate option
4. Enter your notes about the phone call
5. Click Save

Calendar | **Agenda** | Leads | Members | Follow-Up | Guest Log

Today | Tomorrow | Monthly | [Open Activities](#) for today

With	What's Next	Activity Owner	Last Contact
Jasmine Bell	Visited Club: Day 5 Call Today	Katie Smith	Call: 3 days ago Left Message

Actions

Today | Tomorrow | Monthly | [Open Activities](#) for today

With	What's Next	Activity Owner	Last Contact
Jasmine Bell	Visited Club: Day 5 Call Today	Katie Smith	Call: 3 days ago Left Message
Melanie Marks	Visited Club: Day 14 Call Today	Katie Smith	Club Tour: 6 days ago

Make Call | Cancel Call | Reschedule Call | Actions

Call

Jasmine Bell

Type: Visited Club: Day 5 Call
Mobile: (910) 555-4433
Home Phone
Work Phone

Answered | Left Message | Call Later

Call Created
Type: Visited Club: Day 5 Call
Date: Jan 16, 2012
With: Katie Smith
Status: Open
Details:
January 13, 2012 2:51 PM by System

Call Left Message
Status: changed from Open to Left Message
Note: lvm about our january special
January 13, 2012 2:50 PM by Katie Smith

Call Created
Type: Visited Club: Day 2 Call
Date: Jan 13, 2012
With: Katie Smith
Status: Open

Review history and notes here before you call!

Leaving message for Jasmine Bell

Jasmine Bell Telephone Inquiry/Word of Mouth

History | Guest Co... | Telephon...

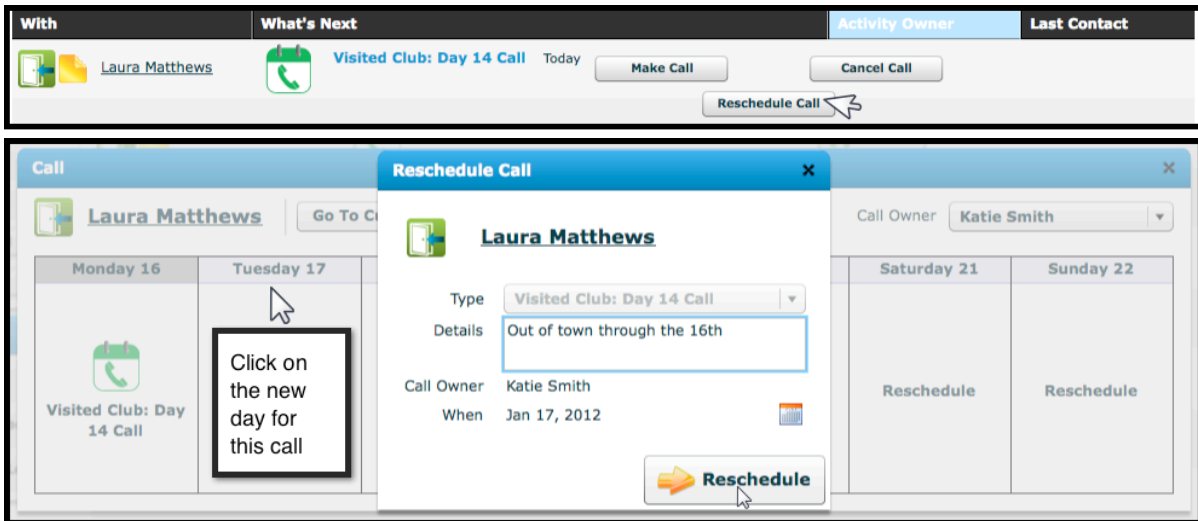
lvm inviting her to our open house this weekend

Call Created
Type: Visited Club: Day 5 Call

Reschedule a Phone Call

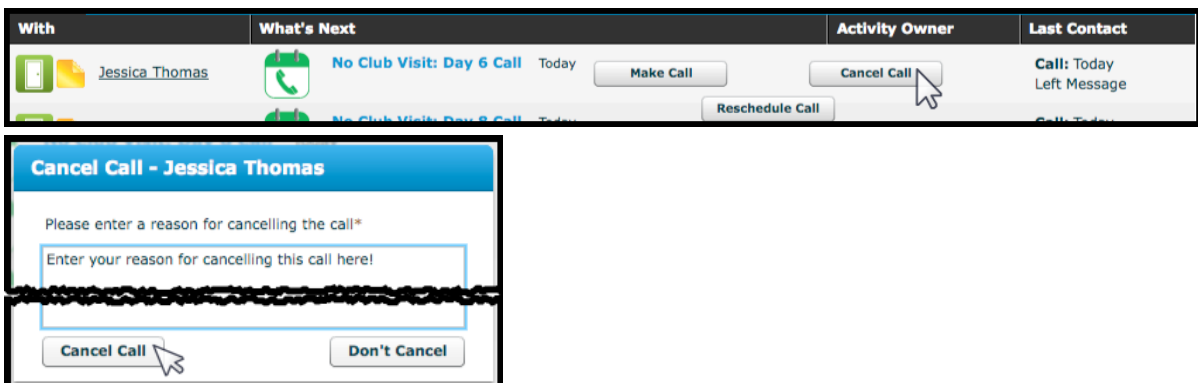
Occasionally you will need to reschedule a call. For example, if the Lead says they will be out of town for a week, you may need to reschedule the next call for when they are back in town.

1. From the Agenda Tab, move your cursor over the Action button of the call you wish to reschedule
2. Click Reschedule Call
3. Click on the day for the new call
4. Optional, but recommended: Enter details of why you are rescheduling the call
5. Click Reschedule



Cancel a Phone Call

1. From the Agenda Tab, move your cursor over the Action button of the call you wish to cancel
2. Click Cancel Call
3. Enter your reason for cancelling the call
4. Click Cancel Call



Make a Call and Book a Tour

1. From the Agenda Tab, move your cursor over the Action button and click Make Call
2. Click Answered
3. Add your notes and click Save
4. From the Follow-Up box, click Schedule Appt
5. Select appointment owner, date and time
6. Click Schedule

Appointment - Beth Hall

Beth Hall | Go To Current Week | Jan 16 - Jan 22, 2012 | Appt. Owner: Katie Smith

Time	Monday 16	Tuesday 17	Wednesday 18	Thursday 19	Friday 20	Saturday 21	Sunday 22
8 am		Julle Smithson		Abby Peterson			
9 am		Carol Jones		Cindy Rella			
10 am							
11 am							
12 pm							
1 pm							
2 pm							

Follow-Up

What's Next for **Beth Hall**

Visited Club: Day 14 Call
Jan 23, 2012 [Reschedule Call](#)

No scheduled appointment [Schedule Appt](#)

Schedule Appointment

Beth Hall

Type: Club Tour

Details: loves yoga

Appt. Owner: Katie Smith

When: Jan 18, 2012 9:00 AM for 30 min

[Schedule](#)

Light green shading = When staff person is available

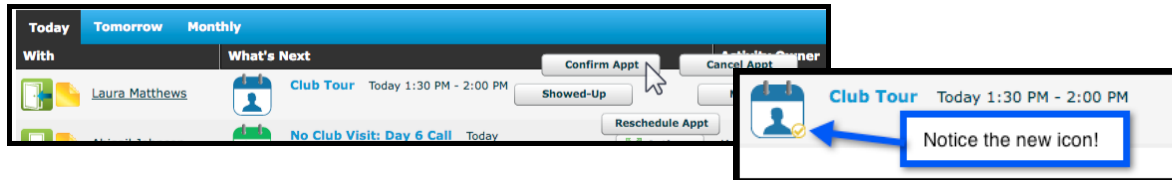
Select which staff person the appointment will be with then click in the box of the appropriate date and time.

Appointments

Confirm an Appointment

There are several places where you can confirm an appointment. This can be done anywhere you see the Confirm Appt button, but the easiest way is through the Action button on the Agenda Tab.

1. From the Agenda Tab, move your cursor over the Action button and click Confirm Appt

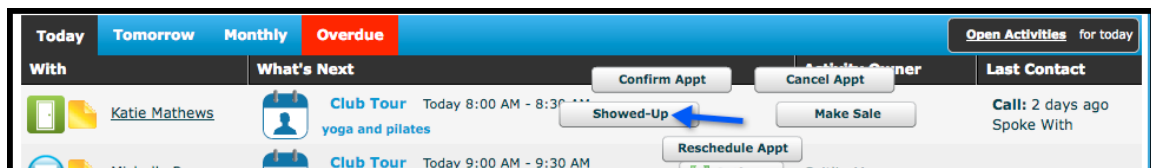


Complete an Appointment

If a lead joins directly from your tour, you can use the Action button and select Make Sale. This will automatically complete the appointment and guide you through the sale process.

For all other appointments:

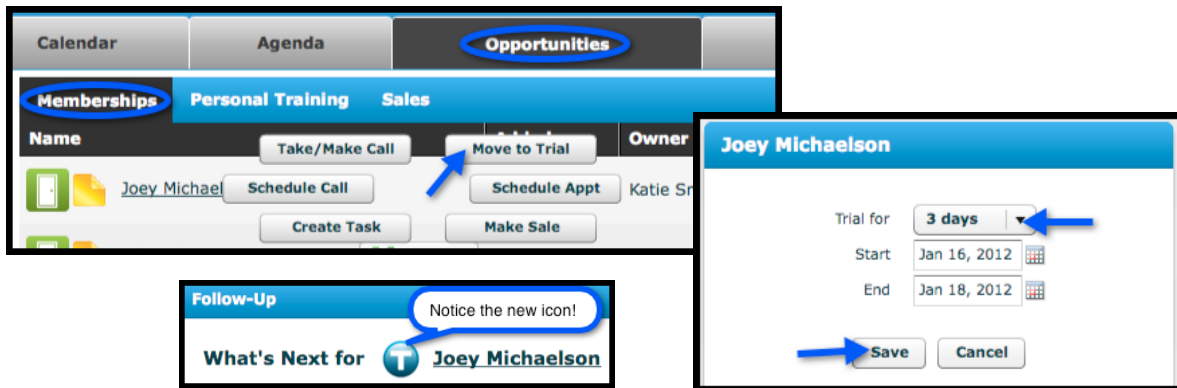
1. From the Agenda Tab, move your cursor over the Action button and click Showed-Up
2. Enter notes about the appointment in this lead's History then click Save
3. Review What's Next in the Follow-Up box then click Continue



Move Someone to a Trial

The Trial group allows you to track someone that is on a multi-day guest pass or membership trial.

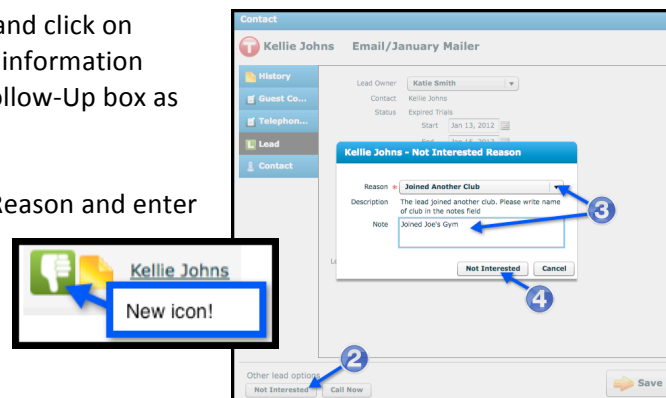
1. Select Move to Trial from one of the following areas:
 - Under the Opportunities Tab using the Action button (this option is in the example below)
 - Under contact information (click on the person's name)
 - From the Search bar under Leads
 - From the Follow-Up box after completing a call or appointment
2. Use the drop down box to select the number of days given for this trial or guest pass
3. Click Save



Mark Someone as Not Interested

When someone is not interested in joining, mark this person as Not Interested. The lead's information will stay in InTouch, but will be taken off the call and email follow-up schedule. You will also be asked to select a reason why this person isn't interested – this allows Managers to run reports as to why potential leads are not joining your club.

1. Find the lead that is not interested and click on his/her name to open their Contact information (Note: This can be done from the Follow-Up box as well)
2. Click the Not Interested button
3. Use the drop down box to select a Reason and enter any appropriate notes
4. Click Not Interested



Return a Lead to Interested Status

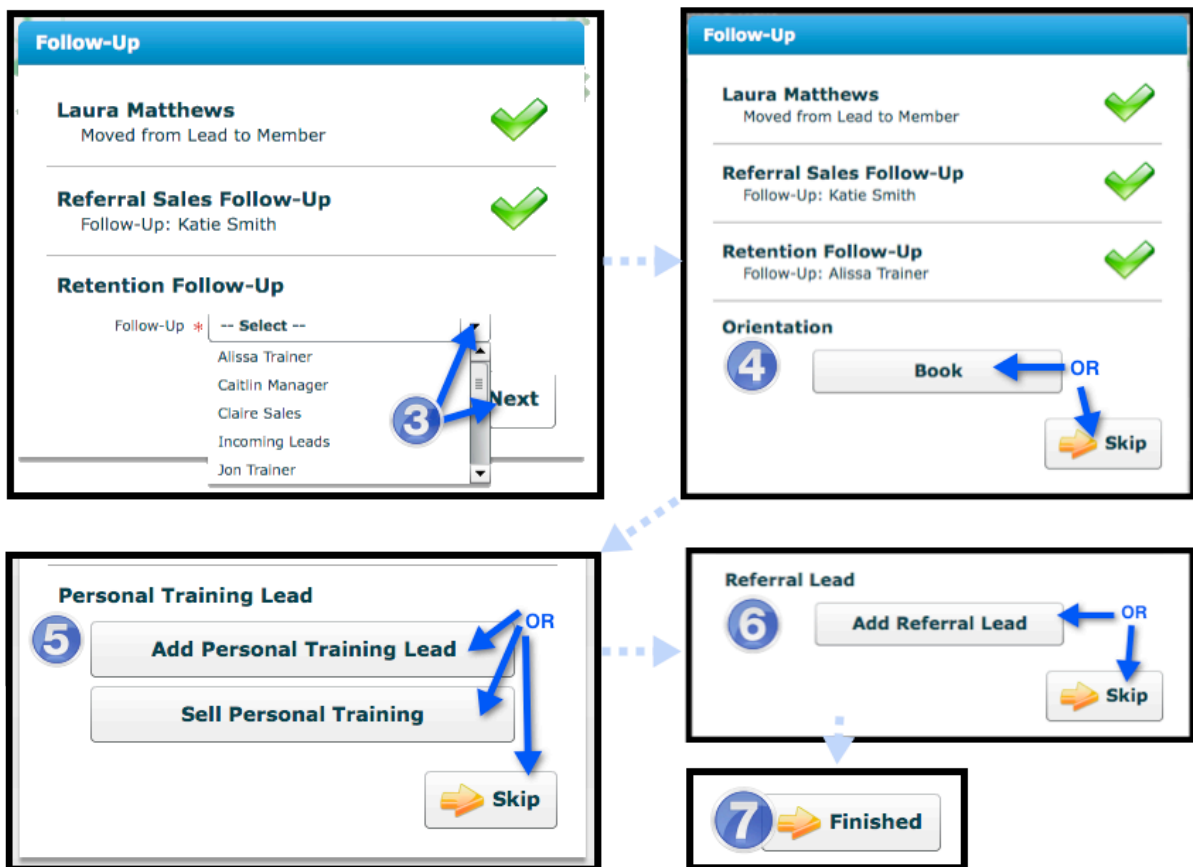
All Not Interested leads can be found under the Opportunities Tab > Memberships > Not Interested. If someone comes back and decides they are interested again:

1. Find the lead and click on his/her name
2. Under the Lead Options, click Interested

Make Sale

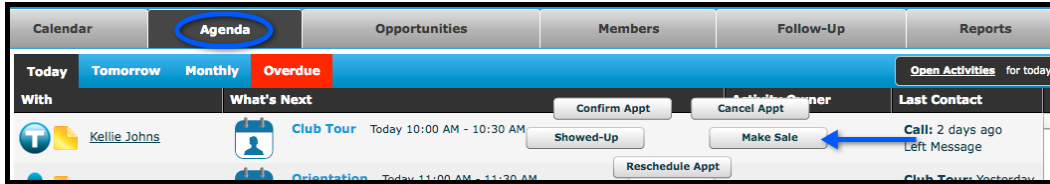
As soon as a lead joins, click Make Sale to change their status from a Lead to a Member. This will allow you to easily: Book an Orientation, Sell PT or Create a PT Lead, and track Referral Leads. This will also put the new member into the Referral Sales Follow-up and Retention Follow-Up groups to receive new member emails and calls.

1. Click Make Sale (see places to Make Sale in following section)
2. Enter any additional contact information and click Make Sale
3. Select the Retention Follow-Up Member Owner using the drop down box and Click Next
4. Book Orientation then Click Schedule or Click Skip
5. Add PT Lead or Sell PT or click Skip
6. Add Referral Lead or Skip
7. Click Finished

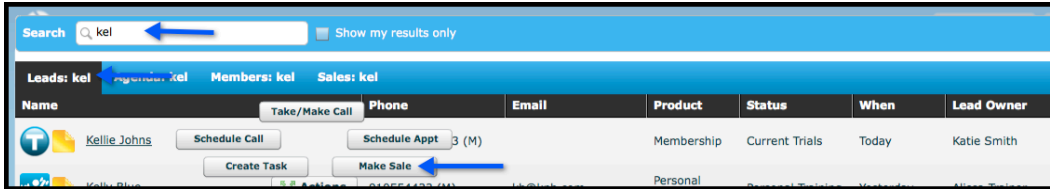


Places to find Make Sale:

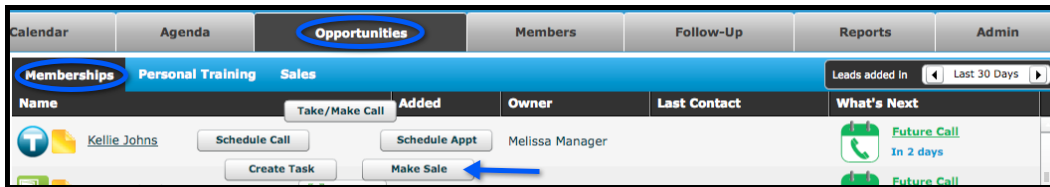
1. From the Agenda tab (for existing appointments)



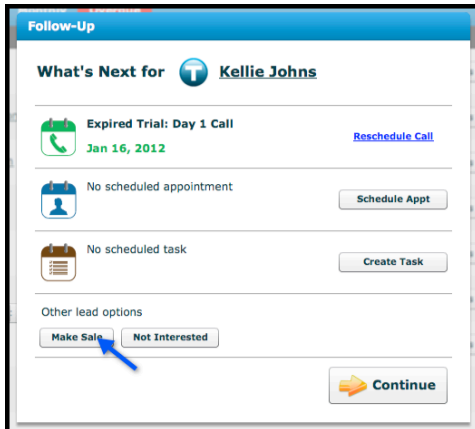
2. From the Search bar



3. From the Opportunities Tab



4. From the Follow Up box (after completing a call, appointment or task)

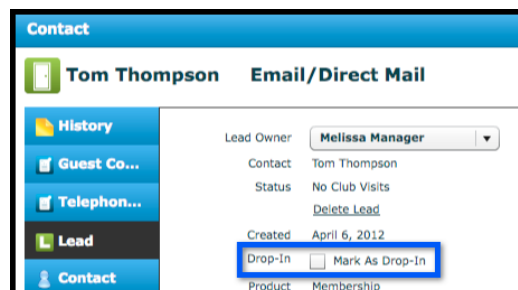


Drop-Ins

A Drop-In is an existing lead (that's never been to the club before) that comes in the club for a tour without an appointment.

To mark that you have toured this person today:

1. Find the lead and click on their name
2. Under the side Lead tab, check the Drop-In box
3. Click Save



Adding New Leads

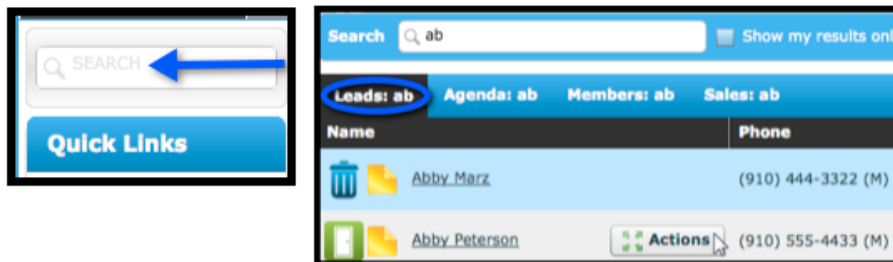
Individuals who want to join your club will express their interest through a variety of means: They may walk in off the street, inquire by phone, send an email to the club, enter their information via a form on your club website, Facebook page, etc. The information that is gathered is entered into InTouch as a new lead. When you add a new lead, InTouch will automatically determine a schedule for follow-up phone calls and emails. This is a key InTouch feature for keeping leads actively engaged in pursuing a membership. Note: Leads collected via your webpage or Facebook are automatically input into InTouch as web leads, and do not apply to the instructions listed below.

There are three ways to add a new lead: New Lead, Referral Lead, and Telephone Inquiry. See each type of lead entry below to determine the best way to enter a new person into the system.

Search

Before adding a new lead, do a quick search to make sure this person isn't already entered as a Lead. This is one way to help prevent duplicates.

1. Click in the Search bar on the left side of the screen above Quick Links
2. Begin entering in a first name, last name, or even phone number
3. If you see the person's name with same phone number, use the Action button to take the appropriate steps with this person instead of entering a new lead



Add a New Lead (general)

This option is for any lead that was not referred by an existing member or was not a new phone inquiry. It also includes walk-in leads/sales.

1. Select New Lead from the Quick Links menu on the left side of the screen
2. In the Add Lead window, enter the lead's contact information
 - Fields marked with a red asterisk (*) are required
 - Fill out first and last name and observe how InTouch recognizes duplicate entries. Take the time to make sure the lead you are entering is not already in the system.



- In the phone field, enter a mobile number if possible. This is very important to make sure the lead will receive text message alerts for upcoming appointments.

- In the email field, enter a valid email. This will make sure the leads will receive automatic email messages at pre-determined times.
3. Select the Lead Owner if different from the default lead owner (whoever is logged in)
 4. Select the Product (Are you creating a Membership Lead or a Personal Training Lead?)
 - If you select Membership (and you have a trial membership program in place), you will have the option of checking the Trial membership checkbox. This will allow you to specify the length for the trial membership or guest pass (up to 31 days).

5. Select Contact Method from the drop down list (how the lead contacted you)
 - Selecting Walk-In will add the lead to the Visited Club category
 - Selecting Email, Lead Box, Web Lead, etc will add the Lead to the Not Visited category
 - Contact method determines the time intervals and the content of automatic emails and scheduled calls outlined in Follow-Up
6. Select the Lead Source. This is how the lead learned about your club (ie: Drive by, Flyer, etc)
7. Enter optional lead source details and notes if desired
8. If applicable, click Details. This will expands the screen so you may enter details such as company name, date of birth, gender, and address.
9. Move your cursor over the Action Button to Save (or Cancel) lead
 - Click Save to save the lead and continue to the next screen
 - Click Save & Add New to save the lead and add a new one. This option retains the contact method, lead source, lead source details, and notes from the previous lead.
 - Click Cancel to cancel the lead and return to the previous screen

- In the Follow-Up screen, observe the date of the scheduled phone call. The call will automatically be scheduled for you in your agenda.
- Although you have the flexibility to re-schedule the call/appointment, or choose other lead options, InTouch best practices recommends staying with the auto-generated information.

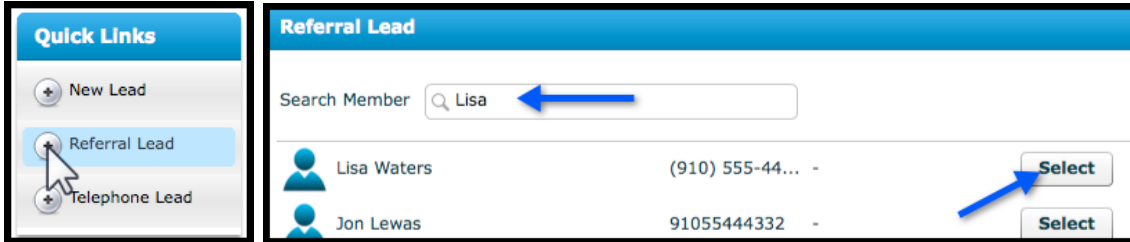
10. Click Continue

Add a Member Referral lead

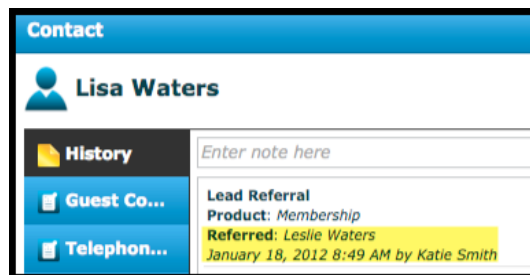
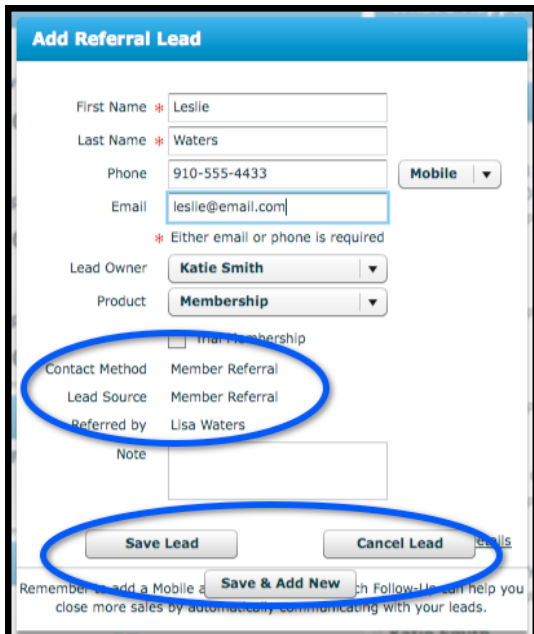
The InTouch referral feature allows you to use current members as contact methods and lead sources. This is particularly valuable if your club offers a referral rewards program. Use this method of adding a new lead any time the new lead was referred by an existing member.

To add a new referral lead:

1. Select Referral Lead from the Quick Links menu on the left
2. In the Search Member field, enter the name of the existing member who made the referral
3. Click Select next to the name of the member



4. Continue entering information as you would for the 'Add a New Lead (general)' section above
 - Note that the Lead Source and Contact Method has been pre-filled as Member Referral
 - Also the note 'Referred by ...' will be listed in the history of this new lead for easy future reference. The existing member will also have 'Referred ...' recorded in their history.
 - To enter multiple referral leads from this member, use the Save and Add New button instead of Save – it will keep the Contact Method, Lead Source and Referral Information for quick entry



Add a Telephone Lead (TI)

The InTouch telephone inquiry feature provides you with a script, making it easy to ask the “right” questions when someone calls your club looking membership information. Use this method of adding a new lead for all new Telephone Inquiries (TIs).

To add a new telephone lead:

1. Select Telephone Lead from the Quick Links menu on the left side of the screen

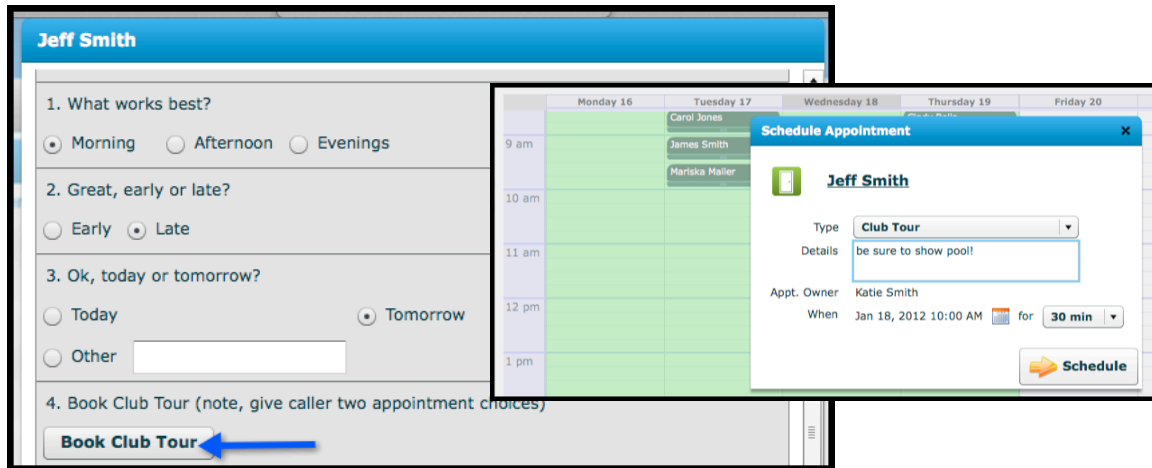
2. Begin entering the lead’s information
 - Make note of the pre-created script introducing you, and asking for the Leads name
 - Fields marked with a red asterisk are required.
 - Fill out first and last name and observe how InTouch recognizes duplicate entries. Take the time to ensure the lead you are entering is not already in the system. For more detail, see the ‘Add a New Lead (general)’ section above.

3. Select the Lead Owner if different from the default lead owner (whoever is logged in)
4. Select the Lead Source. This is how the lead learned about your club (ie: Drive by, Flyer, etc)
5. In the phone field, enter a mobile number if possible. This is very important as it makes sure the lead will receive text message alerts for upcoming appointments. If you cannot get a Mobile number, use the drop-down box to instead designate the number as Work or Home.
6. Record email address if possible
7. Click Save and Continue

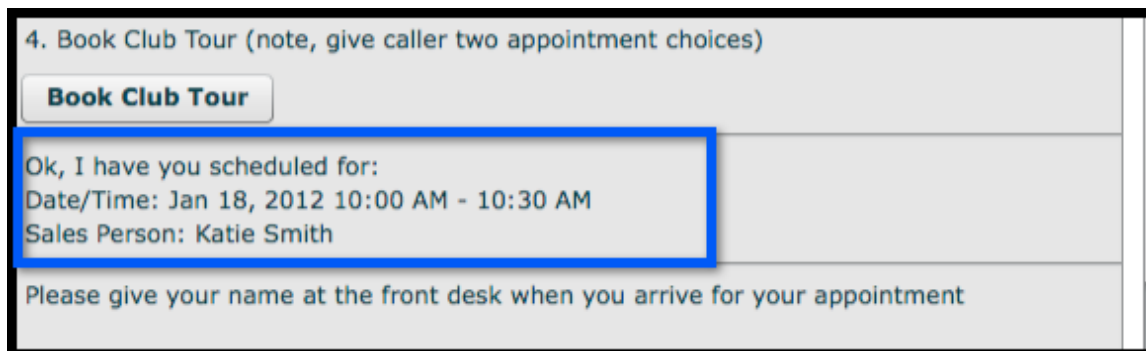
8. The telephone script screen displays a list of questions to assist you in getting the lead to come in for an appointment.

The script also provides the ability to book an appointment immediately; a best practice that InTouch encourages you to do if at all possible.

9. If you are successful in booking an appointment, click Book Club Tour and schedule the date on the pop up calendar



10. After scheduling the appointment you will return to the script. (Make note of the scheduled appointment now displayed on the script screen)



11. Continue to fill out the information on the script
12. Click Continue
13. In the Follow-up screen
 - Observe the date of the scheduled No Club Visit phone call if you were not able to book an appointment. The call will automatically be scheduled for you in your Agenda.
 - Observe the date of the Club Tour, if you were able to book an appointment. This appointment will automatically be scheduled for you in your Agenda.
14. Click Continue

Guest Log

The Guest Log contains a daily log of guests and all new opportunities added. The Daily Log is a record of everyone that has been in your club today. You can also click on the Calendar icon to view previous days. To view the Daily Log, select the Guest Log tab. Note: Not all clubs will have the Guest Log available for Sales Staff to view.

The Daily Log shows:

- Who came in today
- What they came in for (Club Tour, Walk-In, etc)
- The Lead Owner
- The Staff person that met with this customer today
- Did they make a purchase? Did your Membership Lead buy a membership?
- What's Next: The next action for this individual – Did they schedule another appointment to come back? If not, is a phone call scheduled to follow up?

Time	Name	Activity	Seen By	Owner	Purchase	What's Next
9:30 AM	Valerie Brown	Club Tour	David Sales	Caitlin Manager	Yes	Future Call Tomorrow
10:00 AM	Henry Xu	Club Tour	David Sales	Mark Manager	No	Future Call Tomorrow
12:30 PM	Michael Smith	Club Tour	Katie Smith	Jon Trainer	7 Day Trial	Future Call Tomorrow

Example: You probably don't work every day of the week. If you were off yesterday, use the Calendar icon (next to the Viewing date in the top right) and click on yesterday. Did any of your leads come in? Who showed them around? Did they buy? What's next for your lead?

Opps (Opportunities) Added

The Opps Added tab shows all the new leads and new walk-ins entered on the date listed. It also shows the number of leads added next to the date in the top right.

Name	Owner	Last Contact	What's Next
Kellie Johns	Melissa Manager		Future Call In 2 days
Joey Michaelson	Melissa Manager		Future Call Tomorrow
Bruce Brian	Melissa Manager	Club Tour: Today Showed-Up	Future Call In 7 days
Joe Long	Casey Cline		
Kelly Blue	Casey Cline	Call: Today Left Message	Future Call In 3 days
John Smithson	Casey Cline	Call: Today Spoke With	Future Call In 4 days

Follow-Up

The Follow-Up schedule determines when calls are automatically scheduled, when emails are sent out, the content of those emails and for which events a SMS text message reminder alert is sent.

To view the Follow-Up Schedule

1. Select the Follow-Up Tab
2. Select Memberships (for Membership Leads), Personal Training, Members or Text Alerts
3. To view email or text alert content, select the email you wish to see and click View

Name	Status	Action
Email All Interested Membership Leads That Have Not Visited The Club	Off	View
No Club Visit: Day 1 Email	On	View
No Club Visit: Day 2 Call	On	View
No Club Visit: Day 3 Email	On	View

Follow-Up by Lead Type and Lifecycle Groups

There are different groups based on how the lead was created (ie: phone in vs walk-in) or the actions taken with that lead (ie: showed up for an appt or put on a trial). As a lead goes through its lifecycle, its group will automatically change. For example, let's say you put someone on a 7-day trial so they automatically go into the Current Trial group. On day 8, this lead automatically goes to the Expired Trial.



Membership Lead Follow-Up

- Emails and calls for No Club Visits, Visited Club, Current Trial, Expired Trial, and Referral Sales Follow-Up (for the sales person to follow up after the sale and get referrals)
- Emails for website leads and Facebook leads (under Other)
- Text message alerts for appointments (such as Club Tours)

Personal Training Lead Follow-Up

- Emails, calls and a text message alert for a PT Sales Appointment
- Text message alerts for appointments (such as a PT Sales Appt)

Members Follow-Up

- Emails and calls for the Member Retention Owner (this might be the sales person or it might be a second person at your club that is assigned to this member for retention)
- Text message alerts for member-type appointments (Orientation, On-Boarding Meeting, etc)

Follow-Up Examples

The Follow-Up schedule can be customized by your club's administrator(s), but an example of what an email or text message might look like is below.

Example Email for No Club Visit: Day 2 (the day after you enter a lead that has not yet been to the club)
 What you might see is on the left and what the prospect will see is on the right

No Club Visit: Day 2 Email

From Name
Owner - Name

From Email Address
Owner - Email

Subject
Check out our club features!

Send on Day
2

Status
On

Owner = Since this email is to Membership Leads, it would be the Membership Lead Owner. If this was an email to PT Leads, it would be the PT Lead Owner. For Member emails, it would be the Member Retention Owner.

Dear \${user.firstName},

By starting you on the right path, the right program and the right guidance, at \${club.name} we are here to help you reach your goals.

Club Highlights:

- Free parking
- Yoga
- Pilates
- Extensive Free Weights
- Cardio Theatre
- Childcare
- Weekly Social Events

We look forward to seeing you soon!
 \${owner.firstName}
 \${owner.email}

\${club.address}, \${club.city}, \${club.s}
 \${club.url}

From: **Katie Smith <katie@intouch.com>**
 Subject: Thanks for your interest!
 Date: January 16, 2012 6:16:33 AM EST
 To: Caitlin Tupper
 Reply-To: Katie Smith <katie@intouch.com>

Dear Caitlin,

By starting you on the right path, the right program and the right guidance, at InTouch Health & Fitness we are here to help you reach your goals.

Club Highlights:

- Free parking
- Yoga
- Pilates
- Extensive Free Weights
- Cardio Theatre
- Childcare
- Weekly Social Events

We look forward to seeing you soon!

Katie
katie@intouch.com

123 Health Rd, Wilmington, NC 910-555-0309

[Unsubscribe](#)

Note the Unsubscribe link: If a lead does not want emails from the club, the best way to prevent this is for the lead to Unsubscribe using this link.

Example SMS Text Message Alert for a Club Tour:

What you might see is on the left and what the prospect will see is on the right

Club Tour Appointment Alert

Club Tour Appointment Reminder

Content
 Hi \${user.firstName}, \${staff.firstName} \${staff.lastName} will see you at \${club.name} on \${mediumDate.format(\${event.eventStart})} \${shortTime.format(\${event.eventStart})}. \${club.name} \${club.telephone}

Status On

[Close](#)

➔

3:40

Tuesday, January 10

417-82

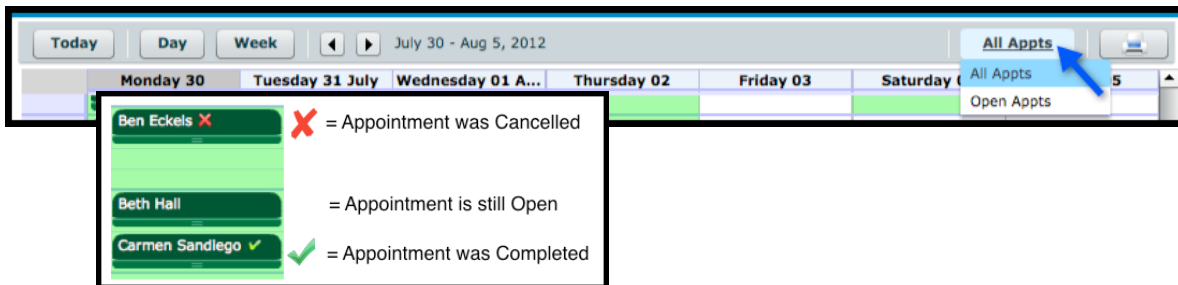
Hi Caitlin, Katie Smith will see you at InTouch Health & Fitness on Jan 10, 2012 6:00 PM. InTouch Health & Fitness 910-555-0309

Calendar

Appointments can be scheduled and viewed from the Calendar tab in addition to the Agenda tab.

Calendar Views

Calendar views default to show All Appointments. To switch this view to see only Open Appointments, click on All Appts in the top right and then click Open Appts.

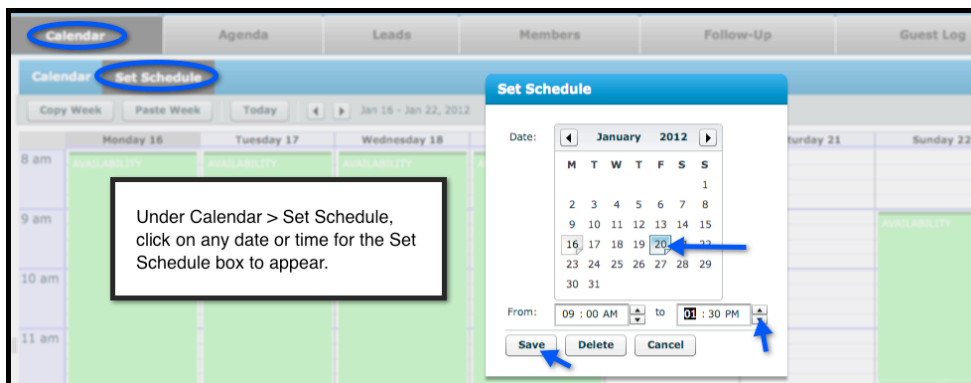


To Set Your Schedule

Note: If you do not have the Set Schedule tab, a Manager will need to set your schedule for you.

To set up your schedule of availability:

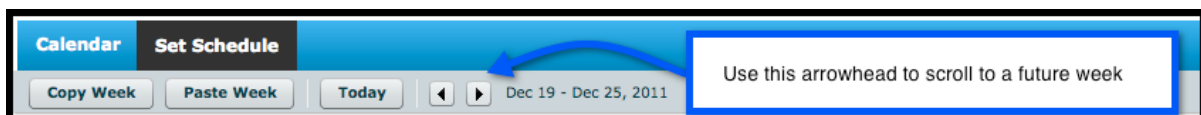
1. Select the Calendar tab
2. Select Set Schedule
3. Click on one of the days of the schedule for the Set Schedule box to appear



4. Select the start and end times for the day by clicking the scroll buttons in From and To fields. Click to change AM and PM as required.
5. Click Save
6. Repeat the process for each subsequent day of the schedule

To copy an existing week's schedule to subsequent weeks:

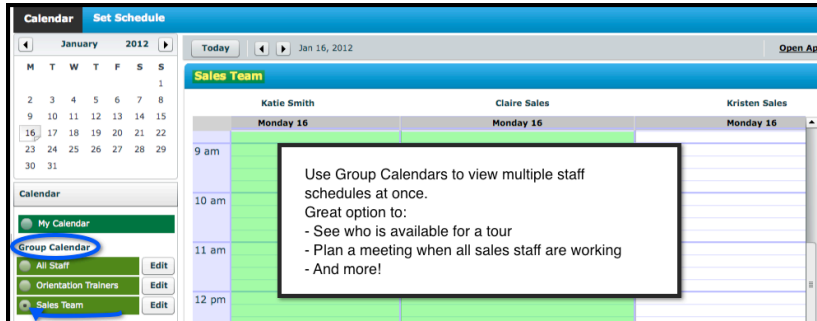
1. Set up schedule for one complete week using the Set Schedule instructions above
2. Click Copy Week
3. Click the arrow buttons to move to the desired week to which you wish to paste the schedule
4. Click Paste Week



Group Calendars

Group calendars can be used to view multiple calendars at a time.

1. Find Group Calendar under the Calendar tab
2. Select the Group you wish to view

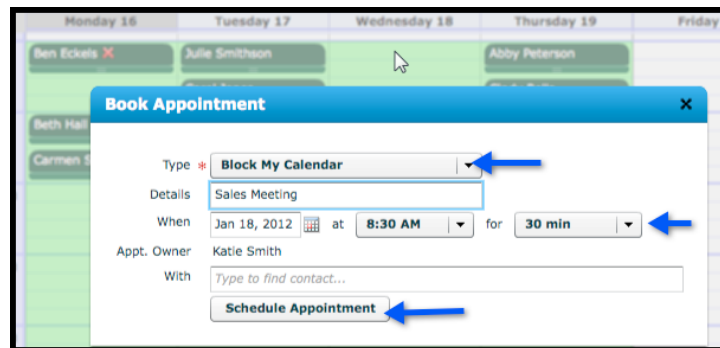
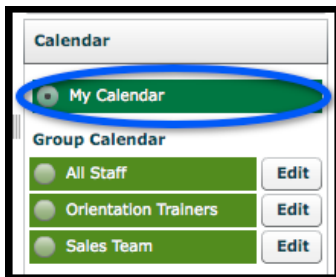


Block Your Calendar

The Calendar feature allows you to block off time during your working hours when you are not available to schedule appointments. For example, you may need to block 12-12:30 for lunch or 1-1:45 for a sales meeting.

Follow the steps below to block your calendar:

1. Go to the Calendar tab and make sure My Calendar is selected
2. Click on the date and starting time you wish to block
3. Select Block My Calendar as the Appointment Type
4. Enter notes under Details (ie: meeting)
5. Confirm date and starting time and select a duration of how long you wish to block your calendar
6. Click Schedule Appointment



Where to Get Support



Click the HELP button from within your InTouch site or go to www.InTouchFollowUp.com/support

InTouch provides an assortment of ways for you to get assistance quickly and easily. Our Support page provides access to a variety of online resources including:

- Training Videos
- User Guides
- FAQ
- Best Practices

We also provide complimentary webinar training for sales staff on the following days:

- Tuesday at 9am PDT/10am MDT/11am CDT/12pm EDT
- Thursday at 12pm PDT/1pm MDT/2pm CDT/3pm EDT

Have sales staff join the webinars by following this link: <https://cmeto.adobeconnect.com/>

Then dial 712-432-0075 and enter Access Code 212741 when prompted.

If you wish to talk to a support representative, please contact us at either (888) 437-8243 or support@intouchfollowup.com.