

Chapter 13

Prospect Manager

FrontDesk v4.1.25

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Prospect Manager

The prospect manager would be used to manage and view appointments that get set by employees and guests. To access the Prospect Manager click **“Customer”** ➤ **“Prospect Manager”**, as shown in figure 13-1. You can also open the Prospect Manager from the Point of Sale program.

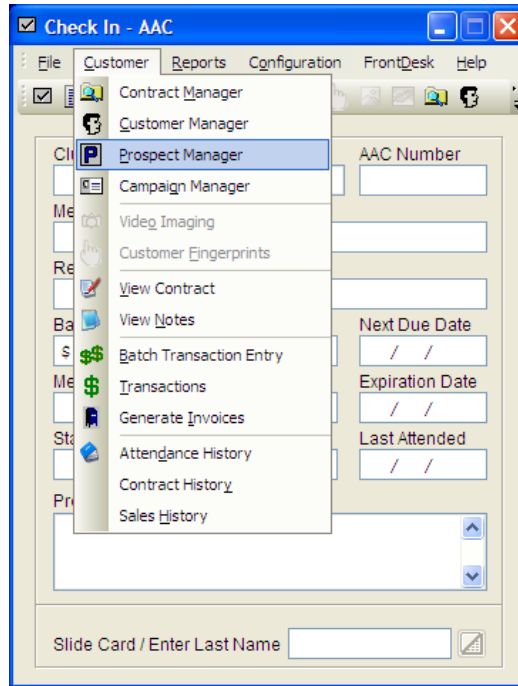


Figure 13-1.

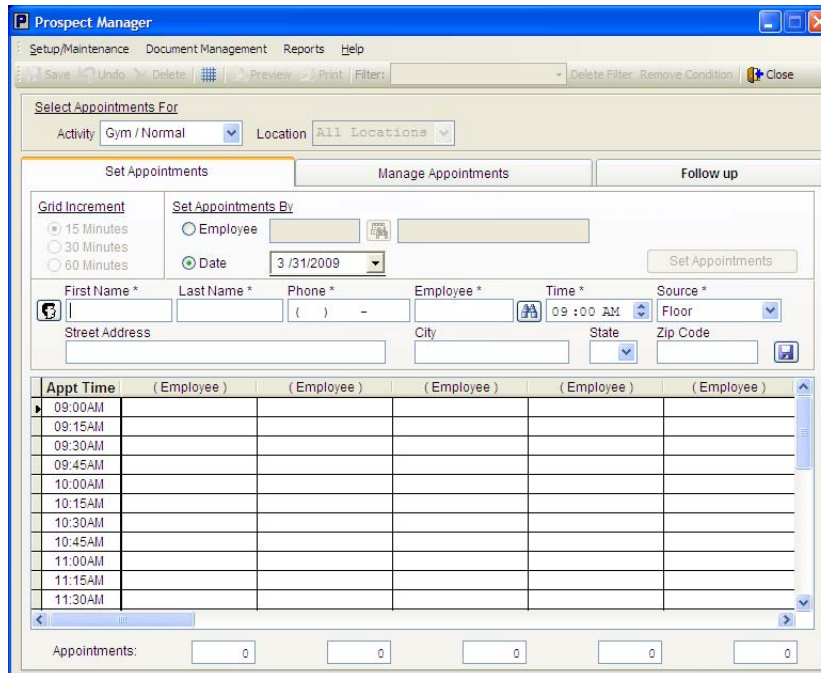


Figure 13-2.



Setup/Maintenance

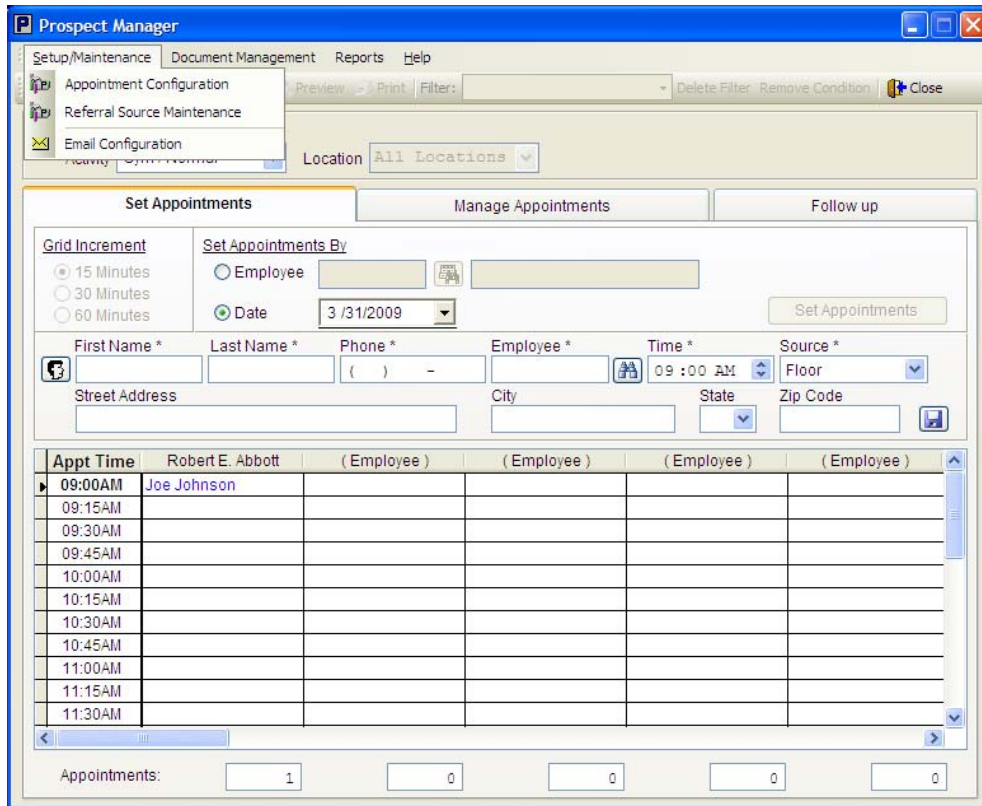


Figure 13-3.

You will need to do a little setup before you can start using the prospect manager. Click **“Setup/Maintenance”** from the menu system, as shown in Figure 13-3. The Appointment Configuration will be used to set the default settings for the Prospect Manager. See Figure 13-4.

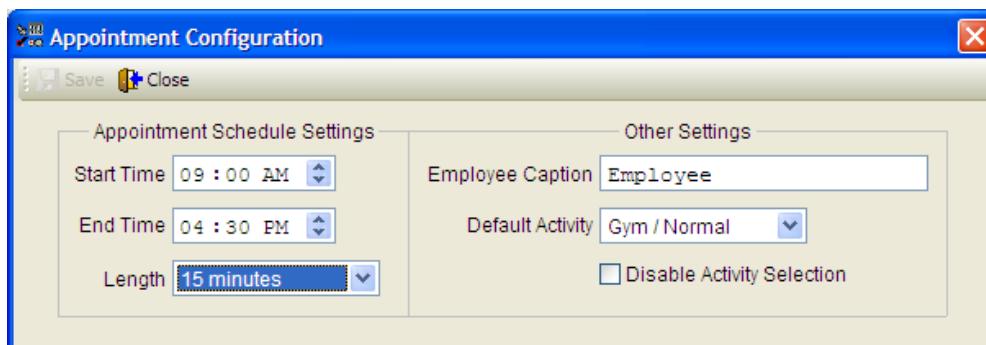


Figure 13-3.

Start Time/End Time: This option will set the Appointment Times that will be displayed in the Prospect Manager, Set “Appt Time” under the Set Appointments Tab

Length: This option will set the increments for the Appt Time.

Employee Caption: This option allows you to change the default text displayed under the Set Appointments by Section under the Set Appointments Tab.

Default Activity: Change this option if you plan on only doing one type of Activity.



Disable Activity Selection: This check box can be unchecked if you have more than one activity that you will be setting appointments for.

Referral Source Maintenance

The Referral Source Maintenance option will be used to set where the referral took place. The default options are Front, Floor, Phone, and Referral. Though this window you are able to add and or delete locations a referral could take place.

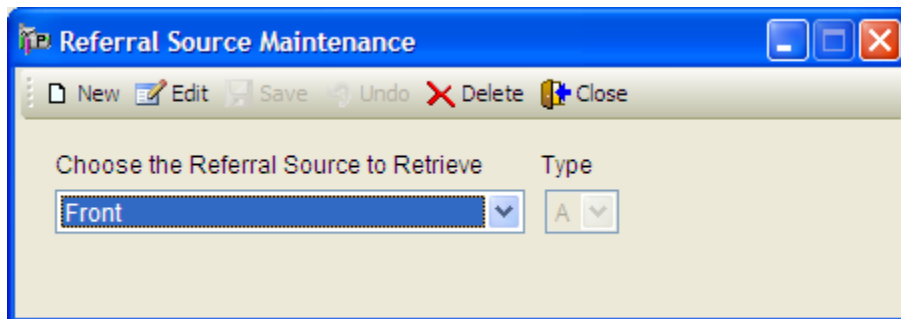


Figure 13-4.

Email Configuration

The Email Configuration option will need to be set to an email address you plan to send your emails from and the default subject line.

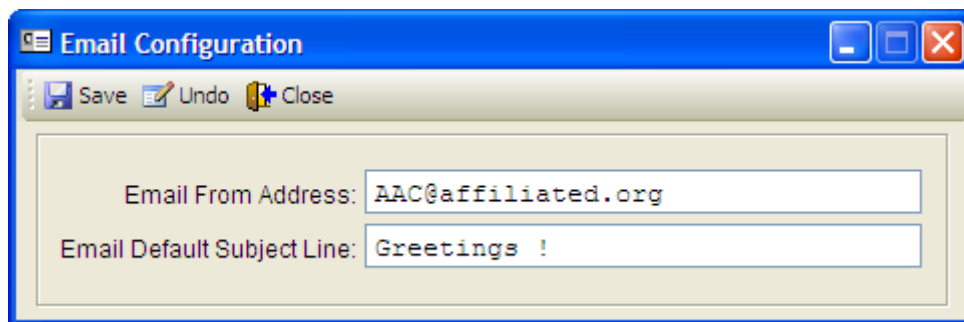


Figure 13-5.



Document Management

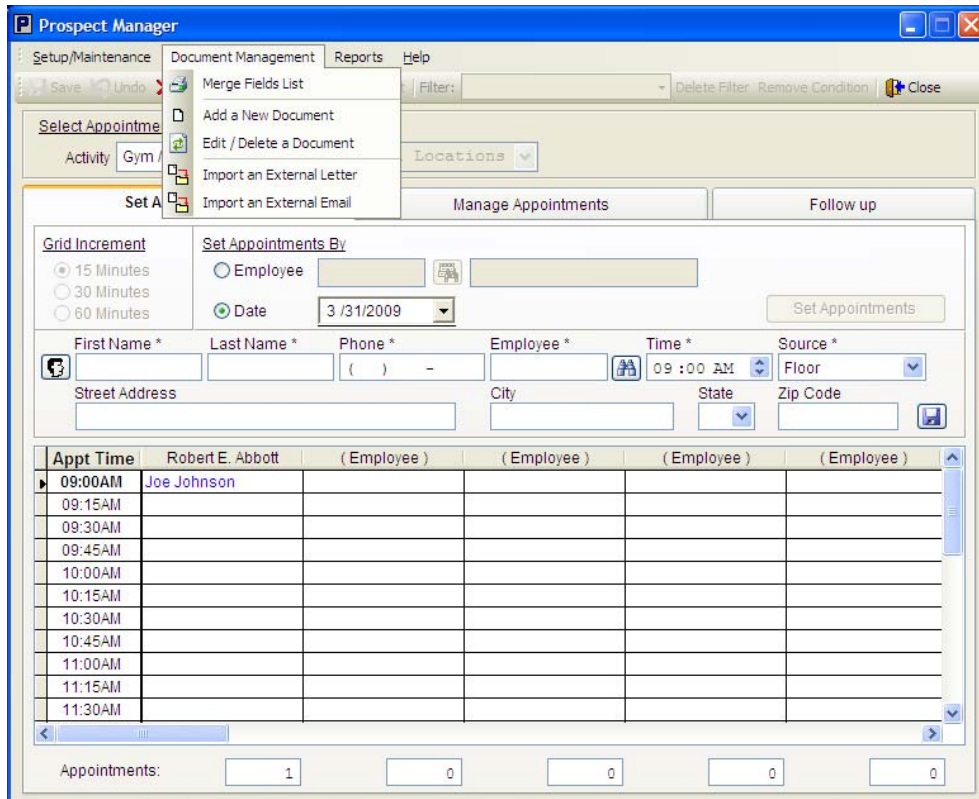


Figure 13-6.

Merge Fields: Opens a list of available fields that may be added to your document.

Add a New Document: Enter the document name you would like to use and how the document will be sent to your members.

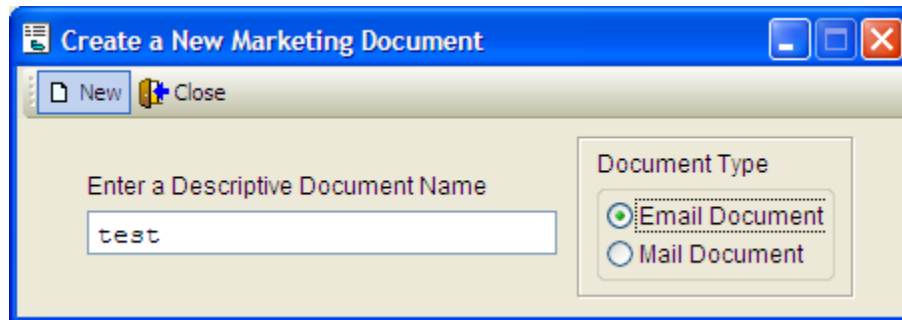


Figure 13-7.



Edit/Delete a Document: Use this option to edit or delete a document you have created but no longer want to use.

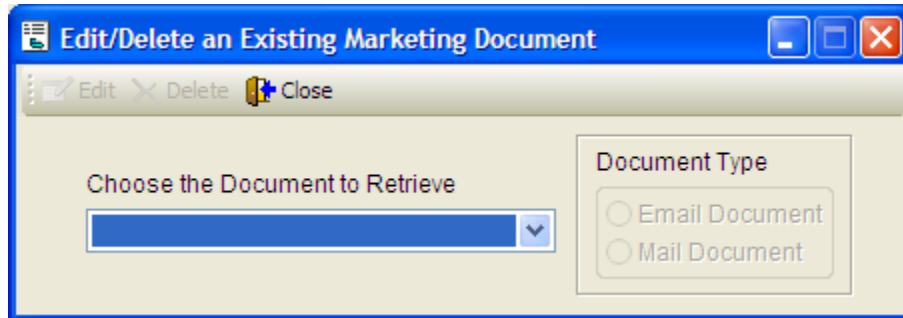


Figure 13-8.

Import an External Letter: Imports a word document to be used as a letter

Import an External Email: Imports a word document to be used as an email

Set Appointments Tab

This tab will be used to set appointments.

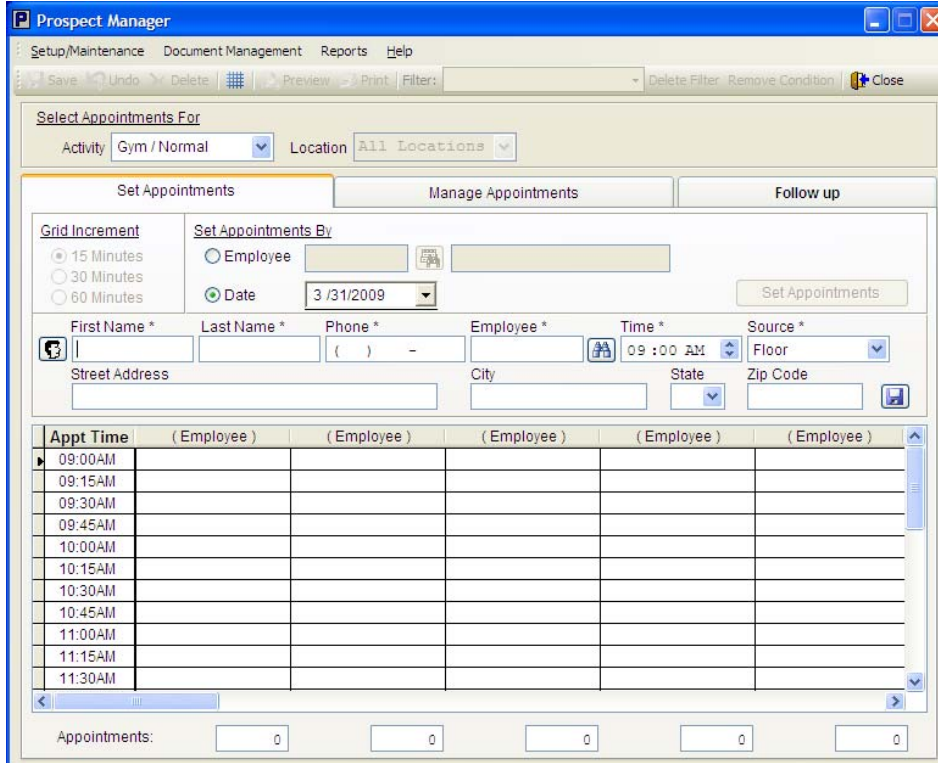


Figure 13-9.



Grid Increment: This option sets the time increments in the grid at the bottom of the application. To change the increments click "Setup Maintenance" ➤ "Appointment Configuration" then select the "Length" drop down box

Set Appointments By: Imports a word document to be used as an email

Import an External Email: Imports a word document to be used as an email

Manage Appointment Tab

This tab will be used to manage appointments that have been setup through the Set Appointments Tab.

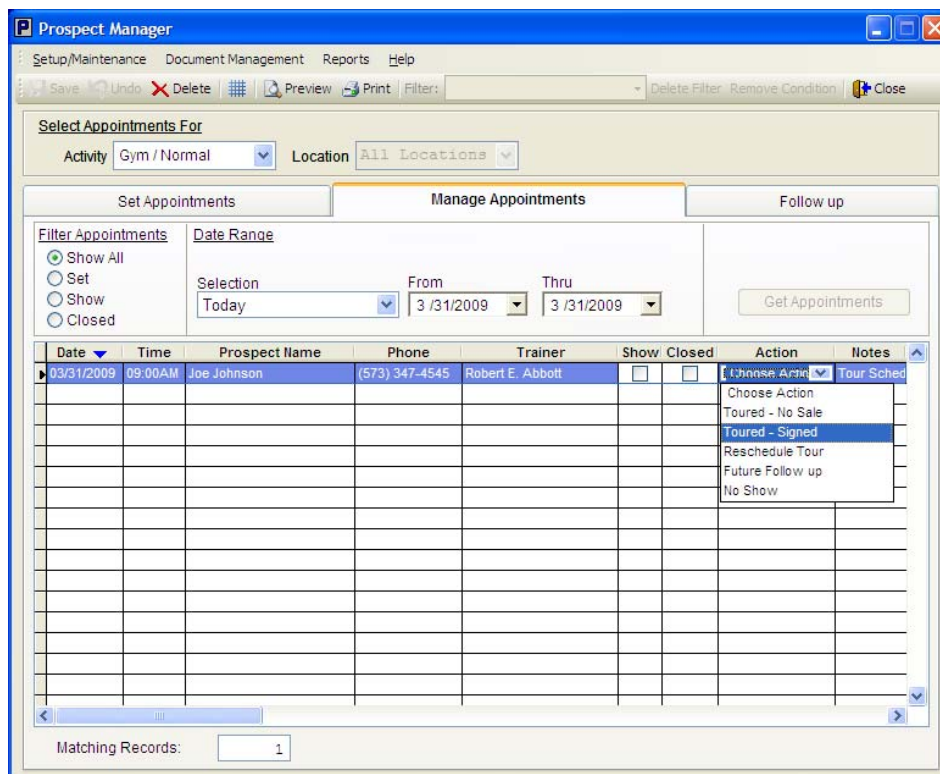


Figure 13-10.

Filter Appointments

There are four different options in this section which control the type of records which show up in the list.

Show All: Will allow all records within the chosen "Date Range" to show. This will include appointments which have had no action taken on them to indicate their status, as well as ones which have had an "Action" chosen such as "No Show", "Toured - Signed" etc.

Set: Will limit the list to appointments such as the one in the illustration above, which are waiting to be handled. (No action has been chosen)



Show: Will limit the list to those appointments where an action has been chosen to indicate that the person with the appointment “Showed up”. (One of the actions “Toured – Signed” or “Toured – No Sale” would have been chosen.)

Closed: Will limit the list to those appointments for which an action of “Toured - Signed” has been chosen and contract entry thru Contract Wizard has been completed.

Date Range

Selection: Select the range from which you would like to search you appointments. These are preset options and should change the “From Field” and “Thru Field” automatically.

From: Select the day you would like to search from.

Thru: Select the day you would like to search to.

Follow Up Tab

This tab will allow you to select the members and the type of follow up you would like to do.

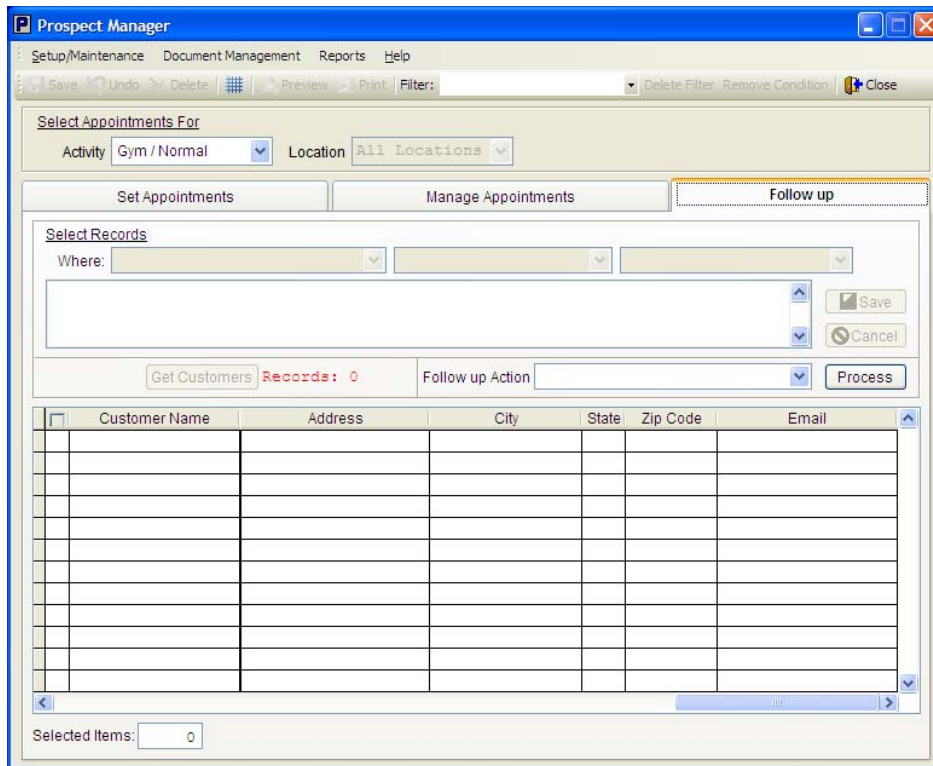


Figure 13-11.

Filter: Choose the type of filter that will be used to select the customers for your follow up.



Select Appointments For: This section lets you choose what type of search criteria that will be used to select your prospects. If “NEW FILTER” is selected from the “Filter” drop down list this section becomes available for selection. After you have selected your search criteria then click the “Save” button to the right and the new filter will be available in the “Filter” drop down list.

Get Customers: Click this button after you have selected the type of filter that will be used to select your prospects.

Follow up Action: This drop down lets you select the type of follow up that will be used on the prospects that the system found with the “Get Customers” Button. If you wish to not include some of the prospects in your list, uncheck the box to the left of the prospects name and that person or persons will not be included in the Follow up Action. After all the prospects you wish to include are selected click the “Process” button.

Reports

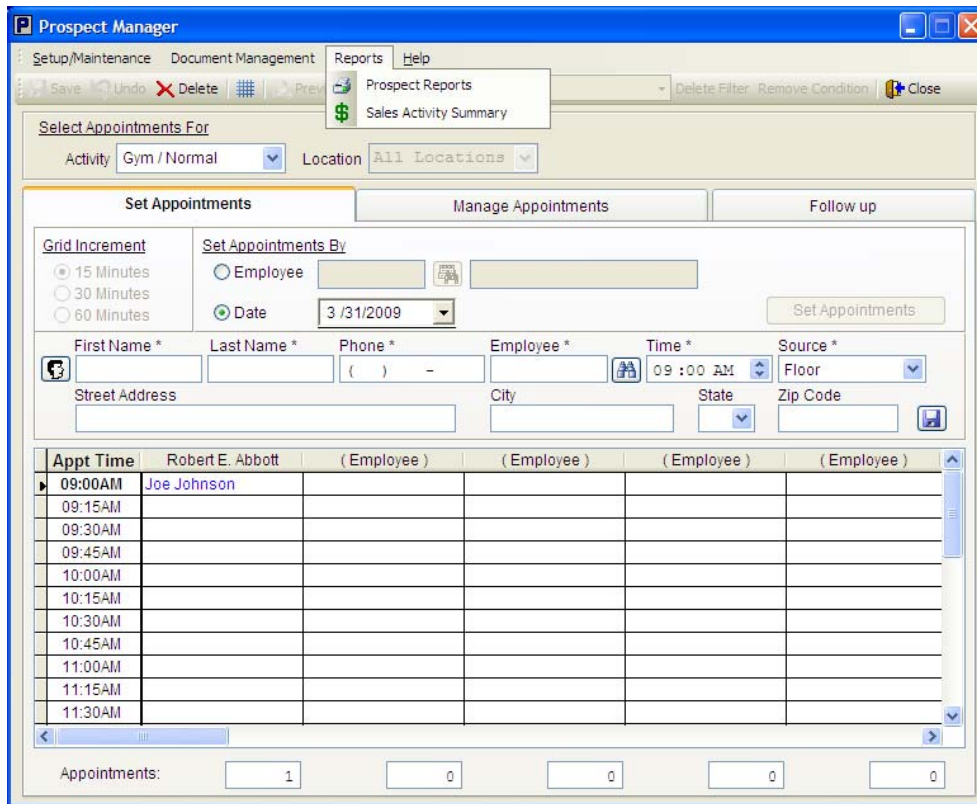


Figure 13-12.

Prospect Reports: Deals with information regarding Prospects as far as what Location the Prospect was signed up at, what club activity was the Prospect interested in, who actually signed up the Prospect, how many appointments did the Prospect have, did the Prospect actually visit the facility, what brought the Prospect in, etc.

Sales Activity Summary: Sales Analysis report on if the club actually signed the Prospect to a Contract and how much. It is a Closure Analysis on how appointments did it take to sign the Prospect or did the Prospect sign. How many Prospects came through the club and how many did we sign and not sign. If we signed the Prospect, how much did the club get, etc.



Prospect Reports:

Figure 13-13.

Status: This is the Status of the Prospect whether the Prospect is Active or Inactive. Both select's all the Prospects.

From - Thru: The date range you would like to run the report for.

Location: If you have multiple locations you may use this option to select only the locations you would like to have the report ran for, if left blank it will run the report for all locations.

Type: This option lets you choose what type of facility you would like to run the report for. For instance if you have a "Gym" and "Personal Training" facility you may run reports for each type separately, if left blank it will run the report for all types.

Sales Id: This option lets you choose which employee you would like to run the report for, if left blank it will run the report for all employees.

Activity: This is how the Prospect was contacted to become a potential sale.

Result: What was the Result of contacting the prospect.

Custom Title: This is a user input Title for the Report.

Show Search Criteria: This will show what criteria was use to build the Report.

Report Type:

Contact History: This report shows your contact history.

Appointments: This report shows your appointments.

Follow-up: This report shows your follow-up.

Sales Productivity: This report shows your sales productivity.

Campaign Promotions: This report shows your campaign promotions.

Matching Records: This section shows you how many people the system found with the search criteria you selected from the previous options.



Sales Activity:

	Contracts	Invoice	Gross	Eft
Prospect	0	\$0.00	\$0.00	\$0.00
Non-Prospect	0	\$0.00	\$0.00	\$0.00
		\$0.00	\$0.00	\$0.00

Figure 13-14.

Date Range:

Selection: Has a few preset options you are able to pick from to help make things a little faster.
From - Thru: This section allows you to select the data range you would like to run the report for.

Select By: Here you have the option to select by location, activity, and employee.

Productivity: This section shows you the information for all the options you selected before.