



Active Entities Organization Assessment:

At the beginning of a management contract, Active Entities starts by conducting an organizational assessment – a systematic process by which we obtain information about the performance of a club and the factors that affect performance. The assessment aims to identify strengths, areas needing improvement, challenges and opportunities. The assessment also plays a pivotal role in beginning the process of developing trusting and productive relationships with the current staff.

The Organizational Assessment includes interviews with managers and staff, review of the marketing, sales, fitness (member integration, personal training, group exercise, etc) operations and financial management functions of the business. We will also want to review reporting mechanisms and metrics that are currently being used to measure success.

We will compile and analyze the data that is collected and develop a plan that includes building a positive, team centered and customer focused culture, identifying a variety of metrics and reporting mechanisms that will help focus the business and steer it in the right direction, and ideas for improving systems and processes that are currently in place.

ASSESSMENT PROTOCOL

A. Staff and Member Perspective: Strengths, Weaknesses, Challenges, Opportunities, Culture

1. Meet with Business Owner
 - Review evaluation process
 - Draft communication from owner to staff announcing ACG
 - Interview business owner w/same tool use for staff
2. Interview Staff (30 – 60 minutes) see attached
3. Administer a member survey (examples attached – work with owner to identify key issues to focus on – do online or paper?)
4. Assessment Results
 - Analyze and summarize results of interviews and survey (see attached)
 - Share with owner and staff

B. Operations, Services, Systems

1. Financial Review
 - Reporting (daily, weekly, monthly reports – what do they have and what do they need?)
 - Projections (do they exist, are they used to set goals, do staff know goals and are they being held accountable for them?)

- Daily reconciliation and posting
- Sales codes (are revenue items coded and rung up correctly?)
- Collections – EFT returns and delinquent accounts
- EFT processing procedures
- Expenses (utility, office and cleaning supplies – can money be saved?)
- Payroll (how is it done, what kind of controls are in place to make sure it is correct?)
- AP (when are bills paid? AP aging report?)
- Pricing
 - a. Enrollment Fees
 - b. Membership
 - i. Dues and Types (month-to-month, commit vs. non-commit, paid-in-full, student, short term, family?)
 - ii. Develop baselines, average dues, etc.
 - c. Ancillary Service pricing (packages, create auto-renew option)

C. Sales

- a. Review software
- b. Review reporting structure
 - i. Daily Action Plans
 - ii. Daily new member report (goal vs. actual vs. last year)
 - iii. Monthly sales and marketing report – conversion rates, acquisition cost, source analysis, ancillary services (see attached)
- c. Prospecting
 - i. How leads are generated
 - ii. Guest and Prospect register
 - iii. Expectations (out-going calls per day, outreach, etc. – Daily Action Plan)
 - iv. Goal vs. Actual over last 12 months
 - v. Referral campaigns - what has worked, what has not worked
 - vi. Renewal process (only for paid in full members – move away from – everyone should be EFT)
 - vii. What is being upsold and what is the process/rewards for upselling services
- d. Staff
 - i. Who sells?
 - ii. Schedule
 - iii. Conversion rates, closing percentages
 - iv. Goals

- v. Compensation (bonus/commission structure)
- vi. Accountability

D. Marketing

- a. Website – content, SEO
- b. Collateral Material
- c. Internal
 - i. Member Communication - promotions, email blasts and newsletters, referral programs
 - ii. Ancillary Services – promotions
- d. External
 - i. Traditional – newspapers ads, coupons, direct mail,
 - ii. Internet - email campaigns (how often), past members,groupon, facebook
 - iii. Guest passes

E. Member Policies

- a. Cancellation policy (what is the process for cancelling? How do they try to save members?)
- b. Freeze policy

F. Desk/Customer Service

- a. Schedules and coverage
- b. Duties and responsibilities
- c. Shift checklists
- d. Current staff- strengths/weaknesses
- e. Phone protocols (how do they answer the phone and questions?)
- f. Fitness and PT Appointment scheduling and cancellations (who can schedule? Trainers? Front Desk?)

G. Fitness

- a. Staff
 - i. Trainer levels?
 - ii. Floor staff and schedule?
 - iii. Goals vs. actual with regards to personal training and group training (monthly reports by trainer)

- iv. General protocols and expectations for trainers
- b. Programming
 - i. Overall program assessment
 - 1. New Member orientation process
 - 2. Evaluate offerings that exist besides standard GE and Fitness Program
 - 3. What added value initiatives are taking place
 - 4. What environmental aspects of the club are being capitalized on.. or not
 - c. Group Exercise
 - i. Current schedule, attendance patterns, what is popular, what struggles
 - ii. Staff?
 - iii. Create a focus group opportunity for current staff to identify what classes should be considered to enhance member experience

H. Facilities

- a. Cleaning protocols and check lists (cleaning company, staff – who cleans?)
- b. Equipment logs and preventative maintenance systems

I. General Management/Operations

- a. Review all emergency checklists and protocols
- b. Review reporting systems (weekly reporting, organizational chart, owners role in day to day operations)

J. Staff/HR

- a. Job descriptions
- b. Performance management system
- c. Rewards and recognition
- d. Expectations/Goals
- e. On-boarding/orientation process
- f. Certifications (up to date?)
- g. Develop regular communication plan (weekly or biweekly emails)

K. Metrics

- Develop metrics to drive business – develop goals, review monthly, hold staff accountable