

New Membership Coordinator Onboarding Checklist

Name : _____

- ☐ Complete new hire paperwork and new hire orientation.
- ☐ Read the Membership Department Manual.
- ☐ Set up computer & workstation
 - Set-up and log Into ShoreTel
 - Record new voicemail
 - Set-up temporary email signature
- ☐ Schedule and complete a fitness consultation for yourself so you can speak from experience on its value.
- ☐ Try out Hydromassage bed/ cryo bed
- ☐ Observe the Membership Manager's or Lead Coordinator's Day activity, Including at least:
 - 10 phone calls
 - 3 club tours
 - 3 paperwork processes
- ☐ Go through a 5 mock tours as the guest so you can learn the different feature-benefit-feedback modules that are commonly used at your club and are to know the facility as best as you can.
- ☐ Familiarize yourself with each piece of membership paperwork so you know which form has which regulations, policies. acknowledgements, etc., and practice this process with your Membership Manager or Lead Coordinator at least 5 times using different scenarios and TWIW's.
- ☐ Go over pro-rated Dues and provide 3 correct answers from scenarios given.
- ☐ Role play and perfect the phone script with your Membership Manager and other team members at least 5 times.
- ☐ **Role play and perfect the Club Tour process by breaking It up Into various sections. Initial each item as you test out: (initial for Test Out)**
 - Telephone Scripts (Outbound/Inbound) -- **(SM)** _____ **(MC)**
 - First Impressions and Needs Analysis ____ **(SM)** ____ **(MC)**
 - Club Tour ____ **(SM)** _____ **(MC)**
 - Price Presentation ____ **(SM)** _____ **(MC)**
 - Handling Objections ____ **(SM)** _____ **(MC)**
 - FMF Presentation and Consult Booking **(SM)** _____ **(MC)**

- ☐ Spend one day working directly with other departments at your club to learn about their roles and understand the operation of the gym.
 - Spend one hour working at the front desk with the Manager on Duty, meeting the member support team, running transactions, and greeting guests and members.
 - Spend time in the play center to learn the rules specific to your gym.
 - Spend time with the aquatics team (If applicable) to learn about their job, swim classes, and other activities in the pool.
 - Spend time with the fitness team to learn about the Expressway, how to help members, become knowledgeable with the machines in your club.
 - Spend time with the personal trainers and familiarize yourself with the team training area in your club.
 - Spend time with the General Manager and/or Operations Manager at your club to learn about their job and how the membership team and operations teams support each other.

Important Systems

VFP:

- ☐ Leads including creating and searching for a lead.
- ☐ Calendar including scheduling and updating appointments.
- ☐ Agenda including managing call list.
- ☐ Opportunities including managing leads.
- ☐ Entering in a sale, booking an FC, and setting up follow up communication.

CSI

- ☐ Review how to process payment at point-of-sale.

MyTAC

- ☐ Membership documents - Including TWIW's, DSR spreadsheet, application forms, membership rates, prorated calendars, guest log sheet, etc.
- ☐ Order business cards & email signature through Marketing portal
- ☐ Club schedule location

Corporate Wellness Program

- ☐ Signed agreement location on MyTAC
- ☐ Wellness packet and tier level descriptions
- ☐ Unique opportunities are handled by Membership Sales Manager

End of Day Sales Entry

- ☐ Review where online DSR is and what information to enter at end of each day.

Driver

- ☐ Go over what information needs to be captured and entered each day:
- ☐ Daily activity including NMU. guests, leads, calls. Etc.
- ☐ Discuss how the individual coordinator's tab can help coordinator track their progress
- ☐ and help them make adjustment to hit their monthly goals.

Commission Sheet

- ☐ Explain how the commission sheet Is used and the importance of entering all sales by the end of business each day.
- ☐ Go over various tabs including Good Life Membership Plus. ACH. and Sales Credit.

Hold Commission Sheet

- ☐ Review the spreadsheet highlighting the difference between No Sale/No Commission and Hold Commission status.
- ☐ Explain how the membership coordinator uses the spreadsheet to resolve any hold comms they may have on their sales.

TAC Website

- ☐ Schedules for GroupX, Team Training, pool, etc.
- ☐ Member Account Login
- ☐ Review different activities TAC offers

ADP

- ☐ How to clock in and out
- ☐ Where to find and review pay statements

Commission Bonus Payout and Backup

- ☐ Go over commission payout schedule
- ☐ When MC receives first commission payout, go through commission backup explaining the different sections of the report.