Using the Trials Website

Change Log

Version	Date	Details
1	6/15/23	Initial site release
2	6/19/23	Added ability to set trial date. Trial date displays on card when set.
3	9/19/23	• Added child name display. • Added ability to add missing child name, phone number, and email address. • Added ability to mark an item as a duplicate. • Added a new section on the site for actions required for the day and functionality to identify what needs to be worked for the day. • Added ability to indicate that a follow-up was made with the lead.
4	11/10/23	• Updated website address to https://www.philamygym.com/trials • Added notification to the navigation menu if action is required for the day. • Added ability to reschedule a trial. • Added section in this document on how to identify if action is required for the day.
5	5/14/24	• Added new lead status type of "Pending initial text" for leads coming from Google, Facebook, or Instagram that did not sign up for a trial and did not get an automated text from us.

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Site Purpose

The site reflects the current status of the trial leads coming in from Facebook, Instagram, and Google as well as trials that have been submitted on the website. The goal is to make sure that the status for each of these is accurately reflected to ensure that no one is forgotten or lost.

The site is located at https://www.philamygym.com/trials/.

Site Overview

There are two sections to the site.
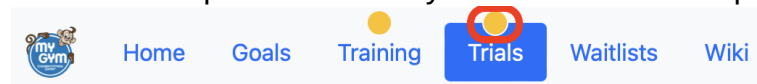
1. **Action Required for <Today's Date>**
   This section lists all of the leads/trials that action is required on for the day. All names in this list should be cleared by the end of the day.

2. **All Current Leads / Trials**
   This sections lists all of the leads/trials that are currently being tracked. No action is required on these, but they can be updated at any time if needed. For example, if you communicate with a customer and they decide to opt-out of signing up for trial, you can find them on the list and mark them as "Not interested" instead of waiting for them to show up in the Action Required list on a future day.

Identifying if Action is Required for the Day

If action is required for the day a notification will display on the navigation menu.

If there are leads that require action to be taken for the day, they will show up in the "Action Required for <Today's Date> section.

If there are active or pending trials that are missing a class assignment, they will show up in the "Action Required for <Today's Date> section.

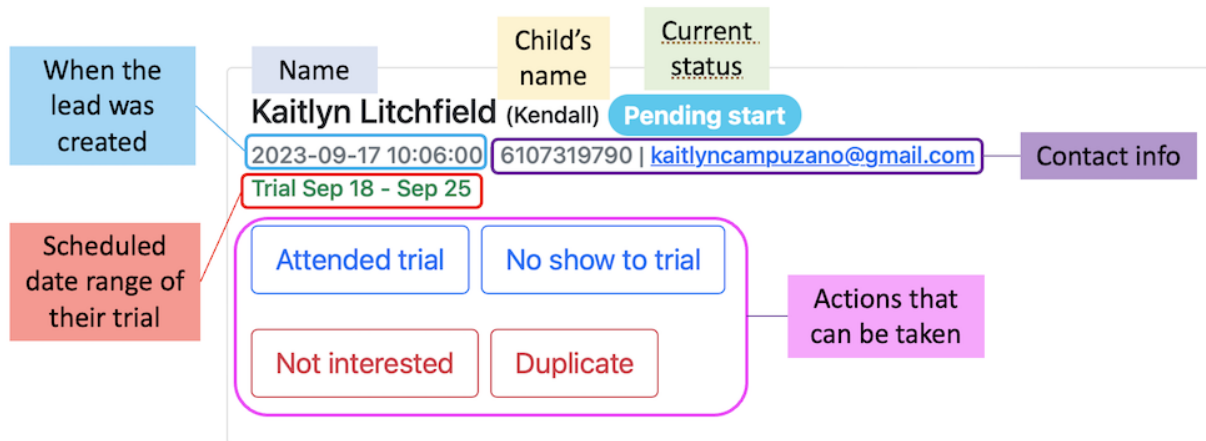If no action is required, this section will state "All done for today!".

Understanding the Information on a Lead/Trial Card

How to Take Action on a Lead/Trial

Based on the current status, there will be different actions available. One of the actions must be taken in order to remove the card from the Action Required section. The following tables describe the available actions.

Lead Status	Status Description	Possible Action	Action Description	Result
Pending initial text	Customer reached us from Google, Facebook, or Instagram, completed a form online with their information, but did not complete the trial sign-up process. Customers in this state have not yet been contacted by us.	Trial scheduled	Select this when the trial is scheduled. You will be prompted to enter the start date for the trial.	Once submitted, this will change their status to "Pending start".
		Sent initial text	Select this when the initial follow-up text has been sent.	Once submitted, this will change their status to "Pending schedule".

Lead Status	Status Description	Possible Action	Action Description	Result
Pending schedule	Customer is still pending their trial to be scheduled. Customers in this state will appear in Action Required 1 day, 7 days, and 10 days after the lead is created. The purpose is so that follow-ups can be made or exhausted if they don't respond. Customers in this state have at least been sent an initial text contact from us either automated or manual.	Trial scheduled	Select this when the trial is scheduled. You will be prompted to enter the start date for the trial.	Once submitted, this will change their status to "Pending start".
		Sent follow-up or communicated	Select this after following up with the customer. If next day, follow-up with the customer over text. If after 7 days, follow-up with the customer over both text and email. Use the provided templates. Alternatively, select this if an active conversation is occurring.	The status will not change and the customer will reappear later for future follow-up.
		Exhausted	Select this if the customer has not responded. This will only appear 10 days after the lead is created.	The customer will be removed from this site.

Lead Status	Status Description	Possible Action	Action Description	Result
Pending start	Customer has a trial scheduled. Customers in this state will appear in Action Required on the day their trial begins.	Attended trial	Select this if the customer attended.	Once submitted, this will change their status to "Trial active".
		No show to trial	Select this if the customer did not attend.	Once submitted, this will change their status to "No-show / reschedule required".
Trial active	Customer has attended their trial. Customers in this state will appear in Action Required 3 days after their trial ended so that confirmation can be made if they enrolled or not.	Enrolled	Select this if the customer enrolled.	The process is complete and the customer will be removed from the site.
		Did not enroll	Select this if the customer did not enroll.	The process is complete and the customer will be removed from the site.

Lead Status	Status Description	Possible Action	Action Description	Result
No show / reschedule required	The customer did not attend their trial. Customers in this state will appear in Action Required immediately after the no-show is marked, and then 2 days and 5 days following the expected trial start so that we can continue to follow-up up to get the trial rescheduled.	Trial scheduled	Select this when the trial is scheduled. You will be prompted to enter the start date for the trial.	Once submitted, this will change their status to "Pending start".
		Sent follow-up or communicated	Select this after following up with the customer. Alternatively, select this if an active conversation is occurring.	The status will not change and the customer will reappear later for future follow-up.
		Trial cancelled	Select this if the customer opts out of continuing the trial or if they do not respond to our attempts to reschedule. Make sure to cancel the trial in MGM so they don't get billed!	The customer will be removed from this site.

Additionally, the following actions can be taken at any time if appropriate.

Action	Action Description	Result
Not interested	Select this if the customer indicates that they are no longer interested in scheduling a trial.	The customer will be removed from this site.
Duplicate	Select this if the customer shows up multiple times on this site.	

Adding Missing Data

Child's Name
Select "add child name", enter the name, and select "Update".

Phone Number
Select "add phone number", enter the number, and select "Update".

Email Address

Select "Add email address", enter the email, and select "Update".

Rescheduling a Trial

Select "reschedule" next to the trial dates. Enter the new trial date, and select "Update".