Class Waitlist Policies & Procedures

Change Log

Version	Date	Details
1	10/16/23	Initial release

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What is a Waitlist and its Purpose?

A waitlist is a list of families interested in their child participating in a specific class. Waitlists are created when a class is full and cannot currently accommodate any more children.

Since we must limit the capacity of our classes, waitlists are necessary to honor these restrictions and ensure safety for our customers in popular classes. Waitlists are the best experience for our customers so that they do not have to continually check in for open spots. Instead, we can save their position and contact them when a spot opens up.

Quick Reference Information

- Waitlist website: https://www.philamygym.com/waitlists.php
- Policies website: https://www.mygym.com/springfield/articles/20944
- A "spot" is an opening in a waitlisted class that needs to be filled by someone on the waitlist.
- After each contact with a customer, make sure a high importance note is left on the child account. This is important so that other staff members are aware of their status.

Waitlist Policies

Below are the policies that must be strictly followed. These policies are posted on our website at https://www.mygym.com/springfield/articles/20944. They can and should be shared with customers.

- The position in the waitlist will be maintained until the customer is removed. We will always contact the first person on the list and work our way down from the top when a spot is available.

- All communication regarding the waitlist spot and any openings will occur over text by default. If a parent indicates that they would prefer to be contacted over email, add a high importance note to the child as well as on the parent account of this preference. Please always check for notes on the account before contacting. Customers should ensure their contact information is up-to-date.

- Customers must respond to any contact about an opening within 24 hours. After that time, the offer will be rescinded, and we will offer the spot to the next person in line.

- The customer must be able to begin their enrollment in the class on the first or second class date following the opening. If they are unable to begin on one of those two dates, we will offer the spot to the next person in line.

- Trials are not available for any class with a waitlist. When a spot is available, the customer must start or transfer their enrollment to this class to begin. If they are a new customer and are interested in trialing our classes, help set them up in a different class with availability.

- If the customer does not respond within 24 hours or if they are unable to begin their enrollment on the offered dates, we will maintain their position in line and we will reach out again when another opening is available. If they do not respond or are unable to begin after the second opening, they will be removed from the list.
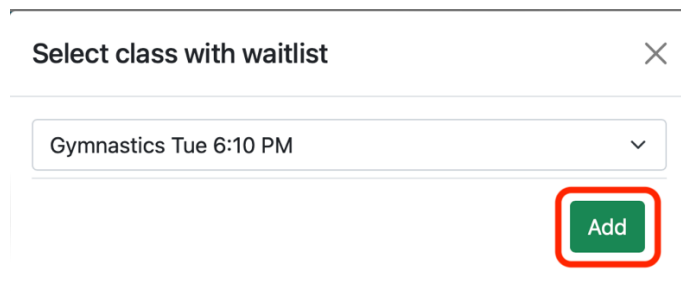
Adding a Waitlist to a Class

When a class is fully enrolled, it must be set up for a waitlist by completing the following steps:

- **Add a *Gruszka placeholder* child to the class in MGM.** This will result in the class having one more enrollment than its capacity. The purpose of this is to ensure that if a customer were to cancel their enrollment, a trial or unlimited class selection cannot be made via the website before we can contact someone on the waitlist to fill the spot. To add the placeholder:
    - Go to the account under Sheryl Gruszka
    - Find (or create if needed) a placeholder child of the appropriate age
    - Enroll the child into the class using the most recent class date
    - Set the enrollment charge to $0 and make a cash payment. No receipt needed.
- **Set a notice reminder in MGM.** This is done so everyone can be informed that a waitlist was added. To add the reminder:
    - Go to the main page in MGM
    - Click "Add Reminder" in the upper right
    - Leave settings as it - Do not select any staff, change the start date, or the duration
    - Add note stating "New Waitlisted Class - <Class Name> <Class Date> @ <Class Time>"
- **Mark the class as waitlisted on the waitlist site.** This is done so that the waitlist site will function properly and automatically catch any spots that open. To do so:
    - Please note: Only a team member with a manager login can complete these steps. Contact a manager if you need assistance.
    - On the Waitlist site, click on the "+" button in the bottom right on the screen and select "Waitlist to class".
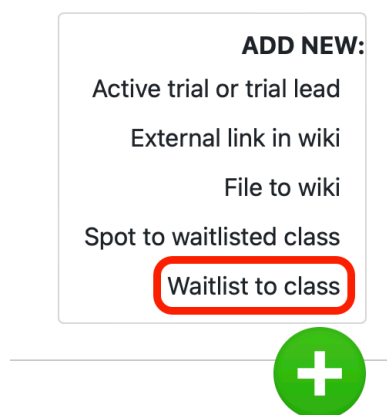
o   Select the class with the waitlist and click "Add" to add it.

o   The class will now show up in the "Classes that currently have a waitlist" section.

Classes that currently have a waitlist

Gymnastics Thu 6:15 PM (remove)

Tiny Tykes/Waddlers Sat 8:30 AM (remove)

Removing a Waitlist from a Class

If the class no longer needs a waitlist because it is no longer fully enrolled, the following steps should be taken.

- **Remove the *Gruszka placeholder* child from the class.** This will allow unlimited and trials to take any open spots in the class.
- **Remove class as waitlisted on the waitlist site.** This is done so that the waitlist site will stop automatically catching any spots that open. To do so:
  - o   Please note: Only a team member with a manager login can complete these steps. Contact a manager if you need assistance.
  - o   On the Waitlist site, simply click on "remove" next to the class.

Classes that currently have a waitlist

Gymnastics Thu 6:15 PM (remove)

Tiny Tykes/Waddlers Sat 8:30 AM (remove)

Adding a Person to a Waitlist

When a customer is interested in a class that has waitlist, they can be added to the waitlist by following these steps:

- **Add the child to the waitlist in MGM.**
    - Please note: They must have a family account created.
    - Click on Enroll/Reserve/Trial class for the child
    - Select the class to be waitlisted in
    - Leave first class as-is. The start date does not matter.
    - Click "Wait List"
- **Send them a text to confirm their addition to the waitlist**. This will also provide them the waitlist policies.

Text Template #1 (Added to Waitlist)

Hi <parent first name>!! Congrats!! You have been added to the waitlist for the <Class name> class (ages XX mos to XX mos) on <class day> at <class time>. We will contact you as soon as there is an open spot and you are next in line. In the meantime, PLEASE REVIEW OUR WAITLIST POLICIES on our website at https://www.mygym.com/springfield/articles/20944. Hope to see you in this class soon!

Identifying when a Spot Opens up on a Waitlisted Class

Class spots will automatically be added to the Waitlist Site when a customer cancels as long as the class was listed in the "Classes that currently have a waitlist" section. Therefore, the website should be checked every day to see if any new spots will be opening up.
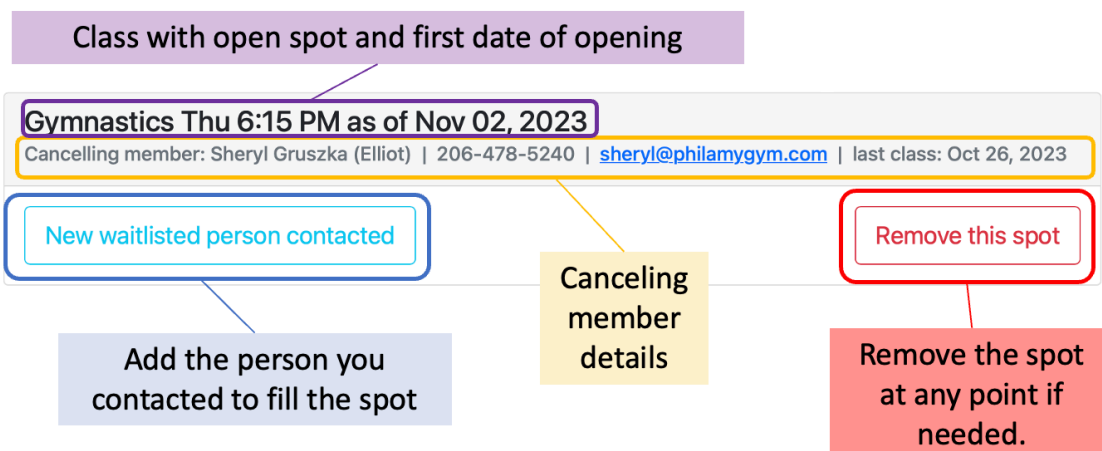
New spots will show up in the "Class spots that need to be filled" section and will appear like this:

Gymnastics Thu 6:15 PM as of Nov 02, 2023
Cancelling member: Sheryl Gruszka (Elliot) | 206-478-5240 | sheryl@philamygym.com | last class: Oct 26, 2023

New waitlisted person contacted   Remove this spot

This is what each of the displayed information means:

Class with open spot and first date of opening

Gymnastics Thu 6:15 PM as of Nov 02, 2023
Cancelling member: Sheryl Gruszka (Elliot) | 206-478-5240 | sheryl@philamygym.com | last class: Oct 26, 2023

New waitlisted person contacted   Remove this spot

Add the person you contacted to fill the spot

Canceling member details

Remove the spot at any point if needed.

Manually Adding an Open Spot to the Waitlist site

There may be situations where a class opening did not automatically add to the site. In this situation, you need to manually add a class spot to manage. To do so:

- Please note: Only a team member with a manager login can complete these steps. Contact a manager if you need assistance.
- On the Waitlist site, click on the "+" button in the bottom right on the screen and select "Spot to waitlisted class".
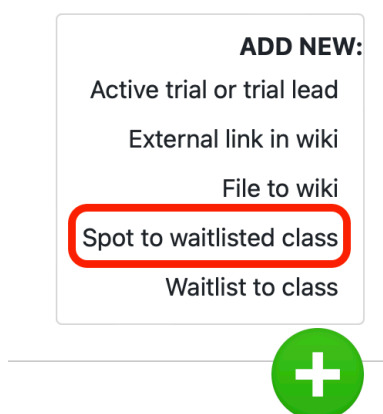
- Complete the details in the form that pops up and select "Add" to add the spot.
    - Please note: The email and phone are for quick reference only and are not required.

Contacting a Waitlisted Person to fill an Open Class Spot

If a customer needs to be contacted to fill the open class spot, follow these steps:

- **Identify the person to contact.** This is top-most person on the list that has not yet been contacted. Do not skip spots.
- **Add a note under the child's account.** In MGM, under the account child, add a high importance note of "Texted regarding waitlist spot for <class> on <class day> @ <class time>." This is so all staff can easily identify the person's status.
- **Send a text to the waitlisted person.**

  Text Template #2 (Spot Open)

  > Hi <parent first name>!! HIP HIP HOORAY!! A spot has opened up in the <Class> class (ages XX mos to XX mos) on <Day> at <Time>! We appreciate your patience. This is a really popular class. Please let us know within the next 24 hours if you would like to start your child's enrollment on either <last class date of cancel + 1 week> or <last class date of cancel + 2 weeks>. Per our policy, if you do not respond within 24 hours or if you cannot start on those dates, we will reach out to the next person on the waitlist. We hope to hear from you soon! Please let us know either way!

- **Add the waitlisted person you contacted to the Waitlist Site.** This is done so that they can be tracked and to help us adhere to the policy. To do so:
  - Select the "New waitlisted person contacted" button.

  - Complete the details in the form that pops up and select "Add" to add the person.
    - <u>Please note:</u> The email and phone are for quick reference only and are not required.
    - <u>Please note:</u> The date and time of your contact is required so that it is clear when the 24 hour window has passed.

o The waitlisted person you contacted will now be visible within the spot.

Tracking the Open Spot via the Waitlist Site

Following up with a Waitlisted Person you Contacted

Once a waitlisted person is added to the spot, they will have actions that need to be taken. You can see this action under their name.

Waitlisted person being contacted

Log of actions taken

Actions required for the waitlisted person

The following table describes the actions that can be taken and the corresponding result.

#	Question / Action	Response	Result
1	Did they respond within 24 hours?	Yes - Enrolled	Customer is marked as enrolled. * If all is good, you can select "Remove this spot". * Remove the "high importance" note from the child
		No	Proceed to Question 2
		Yes – Did not enroll	Proceed to Question 3
2	Is this the second time they have not responded?	No	Proceed to Action 4
		Yes	Proceed to Action 5
3	Is this the second time they have not been able to start?	No	Proceed to Action 6
		Yes	Proceed to Action 7
4	* Send text template 3 (No response, moving on) and contact next person on list. * Add note to the account (**see below table for text templates and note details)	OK	Customer status is added to the log. Another waitlisted customer will need to be contacted.
5	* Send text template 4 (No response, moving on and remove), remove from waitlist, and contact next person on list. * Add note to the account (**see below table for text templates and note details)	OK	Customer status is added to the log. Another waitlisted customer will need to be contacted.
6	* Send text template 5 (No start, moving on) and contact next person on list. * Add note to the account (**see below table for text templates and note details)	OK	Customer status is added to the log. Another waitlisted customer will need to be contacted.
7	* Send text template 6 (No start, moving on and remove), remove from waitlist, and contact next person on list. * Add note to the account (**see below table for text templates and note details)	OK	Customer status is added to the log. Another waitlisted customer will need to be contacted.

** Update the note under the child's account in MGM if they did not enroll.
- Please note: If the customer enrolled, the note can simply be deleted.
- Edit the prior high importance note regarding being contacted for a waitlisted spot.
- Leave the note marked as high importance.
- Change the details on note to appropriate situation. Choose one of the following options:
  - "Texted regarding waitlist spot for <class> on <class day> @ <class time>. Did not respond. First time not responding."
  - "Texted regarding waitlist spot for <class> on <class day> @ <class time>. Was not able to start on the provided dates. First time not being able to start."
  - "Texted regarding waitlist spot for <class> on <class day> @ <class time>. Did not respond. Second time not responding. Removed from waitlist."
  - "Texted regarding waitlist spot for <class> on <class day> @ <class time>. Was not able to start on the provided dates. Second time not being able to start. Removed from waitlist."
- Leaving a note is importance so all staff can easily identify the person's status.

** FOLLOW-UP TEXT TEMPLATES

Text Template #3 (No response, moving on)

Hi <parent first name>. Oh No! We haven't heard from you! So we have offered this class spot to the next person on the waitlist. You will maintain your position on the waitlist and as soon as another spot is open, we will reach out again. Hopefully, we can get you and your kiddo in the class next time! Please let us know if you would like to be removed from the waitlist.

Text Template #4 (No response, moving on, and remove)

Hi <parent first name>. Oh No! We still haven't heard back from you. So we have offered this class spot to the next person on the waitlist. Since this is the second time we reached out and didn't hear back, we will be removing you from the waitlist. Please feel free to reach out in the future if this or another class remains of interest.

Text Template #5 (No start, moving on)

Hi <parent first name>. Per our policy, since you were not able to start on the available dates, we have offered this class spot to the next person on the waitlist. You will maintain your position on the waitlist and as soon as another spot is open, we will reach out again. Hopefully, we can get you and your kiddo in the class next time!

Text Template #6 (No start, moving on, and remove)

Hi <parent first name>. Per our policy, since you were not able to start on the available dates, we have offered this class spot to the next person on the waitlist. As this is the second time we have reached out to offer a spot in this class, we will be removing you from the waitlist. Please feel free to reach out in the future if this or another class remains of interest.

Removing the Open Spot from the Waitlist Site

If the class spot has been filled, or if for any other reason, you may remove the class spot from the website. To do so, simply click on "Remove this spot".

Gymnastics Thu 6:15 PM as of Nov 02, 2023
Cancelling member: Sheryl Gruszka (Elliot) | 206-478-5240 | sheryl@philamygym.com | last class: Oct 26, 2023

New waitlisted person contacted   Remove this spot