

Phase 1: Problem Understanding & Gym Operations Analysis

Objective

The primary objective of Phase 1 is to gain a comprehensive understanding of the current gym membership operations, identify pain points, gather requirements from stakeholders, and analyze industry practices. This forms the foundation for designing an efficient and automated **membership lifecycle management system** using Salesforce.

1. Requirement Gathering

Purpose: Capture detailed functional and operational requirements for managing gym memberships.

Key Focus Areas:

1. Membership Lifecycle:

- Member registration process
- Types of memberships (monthly, quarterly, yearly, family, corporate)
- Start and end date tracking
- Renewal process

2. Renewals:

- Automated reminders for upcoming expiries
- Renewal process and payment handling
- Handling late renewals

3. Membership Freezes:

- Temporary holds for members (medical, travel, etc.)
- Freeze duration and limits
- Notifications to members and staff

4. Cancellations:

- Membership termination process
- Refund policies
- Reporting and analytics on cancellations

Deliverable:

- Requirement Specification Document listing all membership-related processes and pain points.
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2. Stakeholder Analysis

Purpose: Identify all stakeholders, understand their roles, responsibilities, and expectations from the CRM system.

Primary Stakeholders:

Stakeholder	Role	Expectations / Needs
Gym Managers	Oversee operations	Real-time insights on memberships, revenue, and churn; management dashboards
Receptionists	Daily operations	Simplified registration, renewal, and cancellation workflow; reminders and alerts
Trainers	Member engagement	Access to member schedules, attendance, and session tracking
Members	Service recipients	Easy registration, renewal reminders, and notifications about freezes or cancellations

Deliverable:

- Stakeholder Analysis Matrix highlighting pain points, priorities, and key requirements.
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3. Business Process Mapping

Purpose: Visualize and document the current end-to-end membership process to identify inefficiencies and areas for automation.

Process Flow:

- 1. Onboarding:**
 - Member fills registration form → payment processed → membership activated
- 2. Renewal:**
 - Membership nearing expiry → reminder sent → renewal payment → updated membership period
- 3. Freeze:**
 - Member requests freeze → approval → membership paused → membership resumed
- 4. Cancellation:**
 - Member requests cancellation → verification → refund (if applicable) → membership terminated

Deliverable:

- Business Process Flow Diagrams (BPMN/Flowcharts) for onboarding, renewal, freeze, and cancellation.
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4. Industry-specific Use Case Analysis

Purpose: Analyze fitness and wellness industry practices to align the CRM with current trends.

Focus Areas:

- Membership types and packages commonly offered
- Common renewal, freeze, and cancellation practices
- Popular notification and payment methods
- Key pain points in gyms' current operations

Deliverable:

- Industry Benchmarking Report with recommended best practices for membership lifecycle automation.
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5. AppExchange Exploration

Purpose: Identify existing Salesforce apps that can complement or accelerate the solution.

Focus Areas:

- Membership management apps
- Payment and billing apps
- Booking and scheduling apps
- Integration feasibility with SmartGym system

Deliverable:

- AppExchange Evaluation Report listing potential apps, features, and suitability for integration.

Setup

Organization Fiscal Year Edit: Smart Gym

To specify the fiscal year type for your organization, choose one of the options below.

Fiscal Year Information

Your organization can change the fiscal year start month, and specify whether the fiscal year n 2026, your Fiscal Year setting can be either 2025 or 2026.



Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts. Changing the start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before making changes.

☒ Standard Fiscal Year 

☐ Custom Fiscal Year 

Change Fiscal Year Period

Save

Cancel

Name Smart Gym

Fiscal Year Start Month January

Fiscal Year is Based On
☒ The ending month
☐ The starting month

Save

Cancel

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View:

All Users

[Edit](#) | [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N

<div><div>New User</div><div>Reset Password(s)</div><div>Add Multiple Users</div></div>					
<input type="checkbox"/> Action	Full Name	Alias	Username	Role +	A
<input type="checkbox"/> Edit	Shanmugam, Prabavathy	Manager	prabavathy2k8@gmail.com	CFO	
<input type="checkbox"/> Edit	Basuvarasan, Meiyazhagan	Owner	meiyazhagan2k8@gmail.com	CEO	

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To in:

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)



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New User

Reset Password(s)

Add Multiple Users

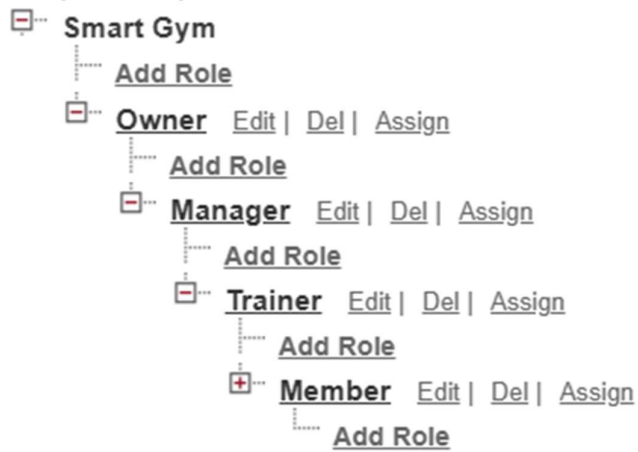
<input type="checkbox"/>	Action	Full Name	Alias	Username	Role +
<input type="checkbox"/>	Edit	Shanmugam, Sridhar	Trainer	sridharshanmugam@gmail.com	Trainer
<input type="checkbox"/>	Edit	Basuvarasan, Meiyazhagan	Owner	meiyazhagan2k8@gmail.com	Owner
<input type="checkbox"/>	Edit	Shanmugam, Prabavathy	Manager	prabavathy2k8@gmail.com	Manager
<input type="checkbox"/>	Edit	Moorthy, Siva	Member	siva2k4@gmail.com	

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Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)



<div>  <div> <div>SETUP</div> <div>Sharing Settings</div> </div> </div>			
Booking	Public Read/Write	Public Read Only	✓
Membership	Public Read/Write	Private	✓

Login Access Policies

Control which support organizations your users can grant login access to.

<div> <div>Manage Support Options</div> <div> <div>Save</div> <div>Cancel</div> </div> </div>	
Setting	Enabled
Administrators Can Log in as Any User	<input checked="" type="checkbox"/>

SETUP

Object Manager

51+ Items. Sorted by Last Modified

Q Quick Find

Schema Builder

Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Member	Member__c	Custom Object		30/09/2025	<input checked="" type="checkbox"/>
Trainer	Trainer__c	Custom Object		30/09/2025	<input checked="" type="checkbox"/>
Booking	Booking__c	Custom Object		30/09/2025	<input checked="" type="checkbox"/>
Membership	Membership__c	Custom Object		30/09/2025	<input checked="" type="checkbox"/>

SETUP > OBJECT MANAGER

Member

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Fields & Relationships

9 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
End Date	End_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Member Name	Member_Name__c	Lookup(Contact)		<input checked="" type="checkbox"/>
Member Name	Name	Text(80)		<input checked="" type="checkbox"/>
Membership Type	Membership_Type__c	Picklist		
Owner	OwnerId	Lookup(User,Group)		<input checked="" type="checkbox"/>
Start Date	Start_Date__c	Date		
Status	Status__c	Picklist		

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

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Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Chart Areas

Fields & Relationships

9 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Booking Name	Name	Text(80)		✓
Class Type	Class_Type__c	Picklist		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Member	Member__c	Lookup(Membership)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Session Date/Time	Session_Date_Time__c	Date/Time		
Status	Status__c	Picklist		
Trainer	Trainer__c	Lookup(Trainer)		✓

Payment

Details

Fields & Relationships

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Quick Find

New

Deleted Fields

Field Dependencies

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(18, 0)		
Created By	CreatedById	Lookup(User)		
Date	Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Membership ID	Membership_ID__c	Lookup(Membership)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Payment Method	Payment_Method__c	Picklist		
Payment Name	Name	Text(80)		✓
Status	Status__c	Picklist		

