Fitness Center Membership & Trainer Scheduling System – Salesforce Project

Phase - 1

1. Problem Understanding

Fitness centers and gyms face challenges in managing day-to-day operations effectively. Current practices rely heavily on manual tracking (spreadsheets, registers, or basic software), which creates inefficiencies.
Key operational areas:

- Membership registration, renewal, and cancellations

- Trainer scheduling and personal training sessions

- Group class bookings (Yoga, Zumba, CrossFit, etc.)

- Attendance tracking for members

- Payment collection and invoicing

2. Industry Pain Points

Pain Point	Description	Impact
Overbooking	Trainers/classes get double-booked due to lack of visibility	Frustrated members, poor trainer utilization
Missed Renewals	No reminders for expiring memberships	Revenue loss, member churn
Inefficient Scheduling	Manual tracking of trainer availability	Conflicts and under-utilization
Poor Member Engagement	No reminders for sessions/classes	Drop in attendance and satisfaction
Payment Issues	Delayed/unclear payment collection	Financial management difficulties
Limited Insights	No centralized dashboards for managers	Poor decision-making

3. Stakeholder Identification

Stakeholder	Role	Needs/Pain Points
Gym Manager	Oversees operations, revenue, staff	Needs dashboards, insights, and automation
Trainer	Conducts sessions and classes	Requires clear schedule and availability view
Member	Consumes services, books classes	Wants easy booking, reminders, and online payments
Receptionist/Admin	Handles check-ins, registrations	Needs simplified workflows for support

4. Salesforce as the Solution

Business Area	Salesforce Feature/Capability
Membership Management	Objects for Members, automated renewal reminders (Flows, Process Builder)
Trainer Scheduling	Calendar events, shift tracking with custom objects
Class Booking	Salesforce Experience Cloud (Portal) for members
Attendance Tracking	Custom object + QR Code check-in integration
Payments	Salesforce Billing/3rd-party payment integration
Engagement	Email/SMS reminders using Salesforce Flow + Marketing Cloud/WhatsApp
Dashboards & Insights	Reports and dashboards for utilization, revenue, attendance

5. Outcome of Phase 1

- **Problem statement defined → Manual inefficiencies causing revenue and engagement loss.**
- **Pain points listed → Overbooking, poor scheduling, missed renewals, no engagement.**
- **Stakeholders mapped → Manager, Trainer, Member, Receptionist.**

- **Salesforce solution framework created → Membership automation, scheduling, class bookings, payments, engagement, dashboards.**