



# FERNWOOD RETENTION *Toolkit*

FITNESS  
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# FERNWOOD RETENTION Toolkit



## OVERVIEW

### What is member attrition?

Member attrition (also known as member churn or member turnover) is the measure of the loss of members. Fernwood monthly benchmark: 4% (or less) of member count.

### What is member retention?

Member retention is the measure of how many members keep their membership active.

### Key benefits of strong member retention include:

- Member retention is more cost effective than member acquisition.
- Happy and engaged members
  - spend more
  - stay longer
  - create more happy members (think referrals)
  - provide invaluable feedback
  - will explore different club offerings
  - are more forgiving at times when things don't go to plan

Strong member retention is supported by club initiatives and processes. Throughout this toolkit we will explore FOUR key areas that will assist in strengthening your club's retention.

## “FERNWOOD FOUR” RETENTION STRATEGY

### 1 **Opportunity:** Overarching Member Love initiatives

**Objective:** Always on - Sense of community - Happy and engaged members

### 2 **Opportunity:** New Member Journey

**Objective:** From Joining until week 8 - Engagement - Habit - Regular Attendance - Feel better

### 3 **Opportunity:** Non attendees

**Objective:** From day 10 non attend to day 35 non attend- Re Engagement - Club visit

### 4 **Opportunity:** Cancellation request/Member save

**Objective:** From Cancel request through to outcome - Solution - SAVE



## 1 OVERARCHING MEMBER LOVE INITIATIVES

**Opportunity:** Overarching Member Love initiatives

**Objective:** Always on - Sense of community - Happy and engaged members

“Always on” member love occurs daily!! Engaged and happy members is the name of the game!

Strengthening Retention is such a fun and rewarding aspect of our roles in club!

See below for some Member Love inspiration.

### DAILY

**Remember member's names and use them!**

Make it fun. Try and learn one member name a day! This adds up quickly and soon you'll be recognising all members coming through the doors.

Once you know their name, learn their story!

**Who is your club is accountable for walking the floor and checking things such as?**

- Making sure our toiletries are stocked up
- Is there tea and coffee available and ready for our members after classes?
- Are the change rooms tidy?
- Is the dishwasher empty/stacked
- Is the music appropriate and the right volume?
- Lights on/off.
- Air on/off.

Smile!!

Look up.

Acknowledge all members not just regulars or favourites (yes, sometimes we have them)

Introduce a member to another member!

Be helpful.

Be genuine.

Be kind.

Be there for your members!!

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## MONTHLY OR BIMONTHLY

**Plan a fun/educational/social event monthly or bimonthly**

- Prosecco & Pilates - Perfect for a Friday night in club event. Refer to toolkit [here](#)
- Birthday cards for members
- Celebrate member visits and milestones such as 1, 2 and 5-year Fernwood anniversary.
- Class-a-thon - might be in line with a Les Mills launch or to showcase a new class style.
- Themed group fitness classes
- Educational sessions focused on health and wellness.
- Educational sessions focused on lifestyle.
- Positive affirmation cards that can be printed and handed out from reception.
- Gym floor challenge - rowing comp etc.

## QUARTERLY

**Member Appreciation Days**

### Why?

Our members deserve it.

Without our members we do not have a club and we don't get to do what we love every day! Member Appreciation Day is designed to give back lots of love to our Fernwood community. It is a day to celebrate our members. Full stop.

### When?

Quarterly. Weave these events into your marketing calendar.

Member Appreciation Days are best placed between the 5th and the 15th of any given month.

### Budget?

Set a budget that suits your club but any investment you make on this day will come back tenfold - think extended length of stay and word of mouth.

We recommend a \$200 to \$500 spend.

### How?

Here's some tips to create a successful day!

- These days can be a surprise for your members, or you can let them know in advance! Share the vision with the team and have them say all day long "Thank you for being a member". Simple words but they mean a lot! This may be the single most (and no cost) important part of the whole day.
- Buy several bunches of flowers and give one to each member as they are LEAVING the club. Of course, as we hand it to them, we say "Thank you for choosing us". The flower is not enough - it is the genuine message that is delivered by the team member that will mean the most!



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- Any treats, special fruit, protein bars, or small gifts can be given out throughout the day. You could attach a small note, poem or affirmation to each one so this special sentiment will linger long after the member leaves the club!
- It is a great time to strike up relationships with local business to add to your stash of goodies for your members. How can you make this mutually beneficial for local business? In return for some goodies, you may offer a complimentary one-month membership for their employee of the month? Advertise their business in the club on this particular day?
- Invite local business into the members lounge to share their wares or services (nothing that will be a cost for members). Complimentary mini massage, mini manicures, free cookies etc. Ensure these local business owners are aware of the theme of the day. This is not an open day. This day is special, unique and solely to thank our members.
- Prize giveaways is every class – You guessed it – with the message “Thank you for being a member”
- Decorate the club. What’s the Goss board – Thank you for being a member!!!! Today we celebrate YOU.
- Lucky dip – lots of small giveaways (these can be from the goodies from local business or small items you have purchased). \$25 gift cards to spend on service. Be mindful that anything you use here should not incur a cost to the member. For example, you may want to gift them a FREE \$29 HYPOXI intro session, but you wouldn’t give them a voucher for 10% off.
- Morning and/or afternoon tea!
- Allow your team time (factor into budget for the day) to sit and enjoy a morning or afternoon tea or simply to walk the floor and give out love heart chocolates and say “Thanks for being a member”.

There are SO many ways that you can make your members feel special and many of them cost zero dollars. Special gifts and morning teas are fabulous, but it is the staff involvement and sentiment which will be the thing that your members will enjoy and appreciate the most!

Our network is close to 70,000 members strong – 70,000 reasons for us to be grateful and return this love all year long. However, a special day like Member Appreciation Day will leave no doubt in your members mind that they are appreciated.

## ANNUALLY

### Club birthday celebration!

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## 2 NEW MEMBER JOURNEY

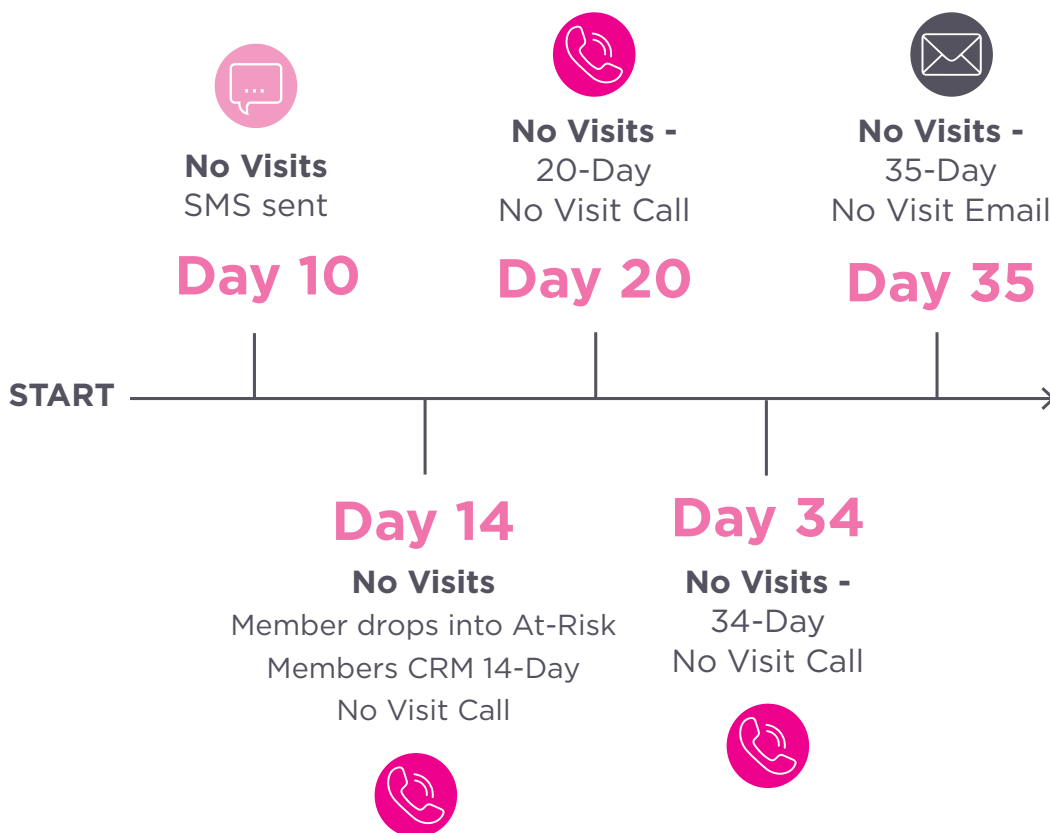
**Opportunity:** New Member Journey

**Objective:** From Joining until week 8 - Engagement - Habit - Regular Attendance - Feel better

In order to give new members the best chance of ongoing success, we need to ensure that we are checking in regularly across the first eight weeks of joining. Fernwood 8-week induction process ensures new members come into the club often and experience a variety of services. This process also helps our team to work with the new member to give them a great first impression and check they are on track to achieving their goals, encouraging them to become a long-term Fernwood member and advocate.

[Click here](#) to access the NMJ toolkit

## 3 NON-ATTENDEE MEMBERS



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**Opportunity:** Non attendees

**Objective:** From day 10 non attend to day 35 – Re Engagement – Club visit

Re engaging non attending members is vital in ensuring the members ongoing journey at the club.

## Automated 10-day SMS

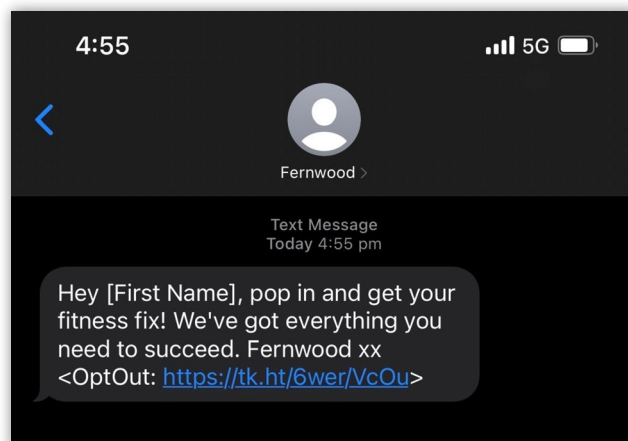
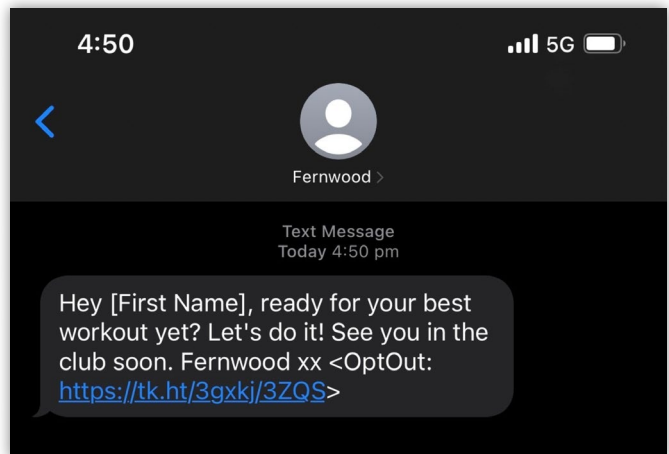
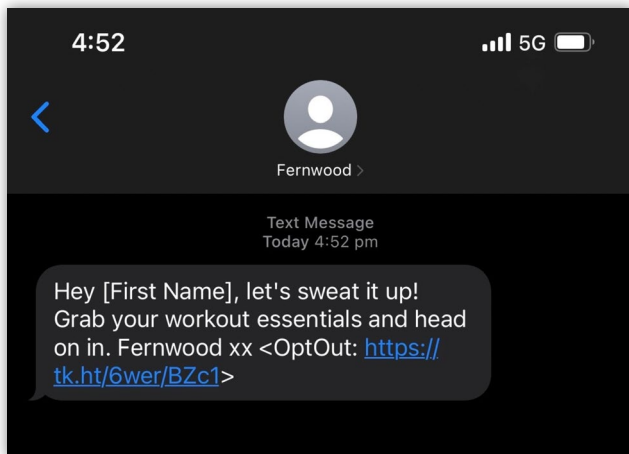
When a member has not attended the club in 10 days they will receive an automated SMS.

The SMS is sent via TalkBox from the no-reply Fernwood number and does not identify the club location but will always sign off 'Fernwood xx'.

SMS content is updated every two weeks to prevent members from receiving the same message should they not visit again for another 10 days.

Each message is generic with a subtle call to action to encourage the member to return to the club.

See examples below.





## AT RISK MEMBER – CRM WORKFLOW

To ensure adequate follow up of non-attending members, we can use a tab within the Exerp CRM called AT-RISK MEMBER. This tab will allow us to streamline all non-attending member communication.

It allows for any team member in the club making this call to have some context/history and bring us a step closer to our objective of bringing our member back in to club.

The CRM flow is automated and will move a member into open when they are due for a follow up call at each touch point of falling into the non-attendee flow.

### 14-day Call

Call will come up as Open in the At-Risk Member CRM 14-days after their last registered visit. There will be 2 call attempts scheduled for the non-attendee calls

**Call Attempt 1** – day 14

**Call Attempt 2** - will automatically be scheduled to the next day (day 15)

Recommended personalised SMS to be sent to the member if cannot reach via phone.

### 20-day Call

Call will come up as Open in the At-Risk Member CRM 20-days after their last registered visit. There will be 2 call attempts scheduled for the non-attendee calls.

**Call Attempt 1** – day 20

**Call Attempt 2** - will automatically be scheduled to the next day (day 21)

Recommended personalised SMS to be sent to the member if cannot reach via phone.

### 34-day Call

Call will come up as Open in the At-Risk Member CRM 34-days after their last registered visit. There will be 1 call attempts scheduled for the non-attendee calls followed by the 35-day email.

**Call Attempt 1** – day 34 since last visit

Please note, clubs will have the ability to either close the member off for any future follow up calls from their Day 34 call or if the club wishes to continue their non-attendee follow-up can manually schedule a call for these members to be prompted for a call later down the track.

Within the CRM the outcomes of these calls can be one of the following:

- **Call answered – Spoke to** --> moves the member into their next non-attendee call until a visit has been recorded in club.
- **No answer** --> moves the member into Call Attempt 2, so they are prompted for a call the next day.
- **Left Message** --> moves the member into Call Attempt 2, so they are prompted for a call the next day.



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- **Follow Up SMS sent** --> only available on Call Attempt 2 call flows. This is just a prompt for the club to send a personalised SMS to the member as you haven't been able to reach them via phone.  
**PLEASE NOTE:** this does not actually send the SMS to the member. Staff will be required to do this either through 2-way SMS via Talkbox or via Zipleads.
- **After their Day-34 call**, the team will be prompted to either Close the task in the CRM OR they can choose a further follow up date creating a DORMANT MEMBER FOLLOW UP if the club wishes to further call and follow-up members during their non-attendee flow. This option will allow the club to enter a manual follow up date

The screenshot shows the FERNWOOD-TEST CRM interface. The top bar indicates 'FERNWOOD-TEST - Exerp 3.0 b655', 'Ferntree Gully', and 'Week 40, 06/10/2022 11:31'. The left sidebar contains a 'MENU' with icons for 'FRONT DESK', 'CLASSES', 'CALENDAR', 'PERSON', 'MEMBERSHIP SALE', and 'CRM'. The main area is titled 'NON ATTENDANCE WORKFLOW' and includes filters for 'Scope' (Ferntree Gully), 'Category' (All), 'Activity' (All), 'Assigned to' (Me), 'Date filter' (No date filter), and 'Date interval' (Last month). Below the filters is a table with columns: Step, Title, Person, Status, Follow-up, Created date, and Last update. The table is currently empty.

**PLEASE NOTE:** At any stage that a member is in the Non Attendance CRM records a visit to their home club, their CRM task will automatically closed as they will now be marked as an active member again.

CRM non attend communications- Please note, you will have to write a duplicate log of notes both in the CRM Non Attendee window, AND the member record notes.

Communications do not link over and staff will **manually** need to copy and paste notes onto member profile.

This is a vital part of Retention strategy, particularly with member feedback and multiple sales staff making calls.

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## CALLS AND SMS

Example script

### Non-Attendee Call

**Who makes the call?** Member love team member

**Objective:** To bring the member back in to club

- commitment to their next workout
- a class booking
- an appointment with a trainer

**Tracking:** At Risk tab in CRM

## VOICE TO TEXT

Today is a great day to work out – see you soon! Fernwood Fam x

## VOICEMAIL

Hi (NAME), it's (YOUR NAME) calling from Fernwood (INSERT CLUB NAME),

I just wanted to touch base and say hello! We haven't seen you recently and I just wanted to let you know that we are here for you and hope to see you soon!

Have a great (day/night)

**(Tip – don't assume things you do not know. At this stage you may not know why your member has not been in so instead of guess work, leave a simple message and follow the call flow)**

## ANSWERED

Hi is that (NAME)?

Hi its (NAME) calling from Fernwood (CLUB NAME) how are you?

I just wanted to touch base and say hello as we haven't seen you in a little while.

- Are you ok? Is there anything I can do to make it easier to get in for your next workout?(try and isolate the reason as to why they haven't been in)
- Lack of motivation – offer support and book a goal setting session for Fernwood Trainer. Bring a friend!
- Lack of time – suggest 30-minute workout options. 24/7. Pulse video library.
- Out of routine – let's plan the next week together and we will help you get back in to habit.
- Bored – let's mix it up. We have so many options. Let me book a complimentary FIIT30/ Reformer session for you. Bring a friend!

We are here to help!!!

## CLOSING


So let's confirm day/time of your next visit

I will check in with you after that

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## AUTOMATED 35-DAY EMAIL

In addition to the 10-day non-attender SMS, a 35-day non-attender email is also sent from TalkBox (screenshots below). The email offers a free class pass for members to refer a friend so they can work out together and keep each other accountable, as well as reminding them of the benefits of Fernwood Pulse.



**Hey [First Name],**

Our busy schedules often have us run off our feet, and sometimes we don't quite make it to the gym or miss that group fitness class we were looking forward to.


At Fernwood we want to make your life as convenient as possible, so you can easily take a moment to put yourself first.

Get the most out of your workout by bringing your bestie along on your next visit – fitness and socialising truly is our idea of a good time! Our free class passes are super simple to share.

And if there's anything else you need, just reach out. We're here any time, or you can book an appointment at reception for when it suits you.

Pop in and let us know how you're going.


Fernwood xx



Head to your Fernwood App to share a free class pass with your best pal, or hit the button below!

You can also check class timetables and book via your app, so you can easily plan your week around your fave classes.

[REFER A FRIEND](#)

**FERNWOOD pulse**   
Online health + fitness

Don't forget about your member-exclusive Fernwood Pulse account!

Jam-packed full of delicious recipes, online workouts, yoga and Pilates classes, meditations and more, Pulse is a one-of-a-kind online resource that compliments all aspects of your life.

[LOGIN NOW](#)

**Stronger together**

Want a little more info? Come and speak to us at reception – you know we love a chat!

Stay up-to-date with what's happening in the Fernwood community via our social channels and blog. We can't wait to see you in club soon!

From the team at Fernwood Belconnen

[f](#) [@](#) [blog](#)



## 4 MEMBER SAVE PROCESS

**Opportunity:** Cancellation request/Member save

**Objective:** From Cancel request through to outcome – Solution – SAVE

A cancellation request = Member Save Opportunity!!

Implementing solid process in steps 1, 2 and 3 above will assist in minimising cancellation requests.

However, cancellation requests will occur, and they should be viewed as OPPORTUNITY to save a member. This is our last opportunity to isolate the members objection and SAVE them.

### Who should be having these conversations with members?

We recommend that these requests are handled by one of the following team members

- Club Owner/Manager/Club Co (priority if available)
- Membership Consultants (no more than two in a shift)
- Member Love team (if they are rostered on)

### What are our objectives for Member Saves?

Member saves are best achieved FACE TO FACE.

We know that not everybody will come in for an appointment, so we recommend setting a target of 50% of member requests to be handled FACE TO FACE.

If an appointment is not possible, a Member Save phone call is our next best option. It is important that the same tools should apply for these phone calls and be managed back of house, not out at reception. These phone calls should be taken and managed by Club Managers/ Coordinators, Memberships Consultants and/or Member Love team in club.

### Incoming call – cancellation request

Script (laminated and stick behind reception and roleplay)

*“Thank you for your call, we can definitely help. There are only two team members who handle this type of request as we are dealing with your confidential banking information. The best thing to do is get you to pop in to club. Does a morning, afternoon or evening work best for you to do that?”*

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## DO NOTs

- DO NOT mention the cancellation word (refer to it as a request)
- DO NOT ask them why they are wanting to cancel their membership (they will not be able to go back from this)

## DOs

- DO be polite and professional
- DO be assertive in achieving an appointment

## What if we cannot book an appointment?

*“No problem, as I mentioned there are only two team members who handle this type of request as we are dealing with your confidential banking information. I will get them to call you back as soon as possible. Does the morning, afternoon or evening work best for them to call you?”*

## MEMBER SAVE OPPORTUNITIES

### ACKNOWLEDGE YOUR MEMBERS REQUEST

### EMPATHISE WITH YOUR MEMBER

### ISOLATE THE OBJECTION (IS IT CONTROLLABLE?)

### OVERCOME THE OBJECTION

### UNDO THE CANCELLATION REQUEST AND HELP YOUR MEMBER WORK TOWARDS THEIR GOALS

#### Lack of Motivation – Controllable

“I can understand how you feel.

Many of our members go through the same feelings from time to time.

I would love to talk about what your goals when you joined the club?

What activities did you enjoy with training reformer, PT or FIIT30?

Did you achieve your goals?



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The hardest thing about getting to (insert goal) is consistency in training, this is why we have our personal trainers on hand. They help you build a routine and support you through your ups and downs as it's normal to feel that way.

I would love to help you start working towards (insert goals) with complimentary personal training for the next four weeks. Usually, a trainer is \$45 per week, since you have been with us for a while I'll do this at \$0 for the next four weeks to get you back on track. Why don't we book these complimentary sessions now?

We also know life gets busy from time to time, you also have XXXX workouts available in the MyFernwood app to help you make some time for yourself at home during the week – do you have the app?

Let's get you back on track, when are you free and I'll book you in for that first session with a trainer."

## Financial – Controllable

4-weeks free payment break

"We can understand your challenge during this time. I am so pleased you are speaking to us about it and we would love to help you keep training. Just to confirm, you love the club and would training if it wasn't for finances? Amazing – we want to help you over the next few weeks with 4 weeks free of payments. This way you can still focus on yourself, continue training and we hope this helps you through this time."

Rather than offering freeze time, let's offer a free period so they can keep their training consistent rather than becoming a dormant member.

## Other Options

Many members think that cancelling their membership is their only option when faced with life's challenges. It is our role to actively listen to their needs and provide solutions to their changes in routine.

- Complimentary FIIT30 – 30 days
- Complimentary Reformer Pilates – 30 days
- 4 weeks of PT (one session per week)
- Freeze
- Medical freeze – up to 6 months with certificate
- Bring a friend pass – 2 week complimentary to train with a friend
- Childcare pass – 5 sessions
- Pulse & Fernwood App
- Payment break 4 weeks – financial

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## 3-DAY PASS CANCELLED MEMBERS


We understand that we won't be able to save EVERY member, so in the event that a member continues through with their cancellation, leaving things on a positive note is important. Hopefully, the member will return to us in the future.

We recommend providing them with a 3-visit pass for when they feel ready to your club.

These cards can be ordered on SFM so you can complete the details on the back and give to the member when their membership at Fernwood has concluded. Stay front of mind!



VISIT	VISIT	VISIT
#1	#2	#3
NAME		MEMBER ID
<input type="text"/>		
CLUB NAME AND DETAILS		
<input type="text"/>		
<input type="text"/>		
<b>TERMS AND CONDITIONS:</b> Pass only valid 8 weeks after cancellation date in staffed hours only for the recipient of the pass. Not in conjunction with any other offer.		



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## CANCELLATION REASON SURVEY

Use the Cancellation reason questionnaire to help reduce member attrition and future leavers. It will help clubs collect information around why members are leaving and provide insight as to how we can change and evolve for better outcomes.

This questionnaire is part of the Stop Subscriptions process when cancelling a membership in Exerp.

For the survey, we recommend a paperless process, where as part of the member save conversation you ask the member the below and record it directly into Exerp, however in the scenario where you need to record this on a form to complete at a later date we have designed a new cancellation request form attached - also available on the intranet under the Member Admin page [here](#)

### Cancellation Reason Questions

- 1 What was your original health & fitness goal when starting with Fernwood?
- 2 On what level did you achieve this goal?
- 3 Could we have done more to assist you with your goals?
- 4 What is the reason you want to stop exercising at Fernwood?
- 5 If your circumstances change, how likely would you be to re-join Fernwood again in the future?
- 6 How likely are you to recommend Fernwood to a friend in the future?

Cancellation Reason training video can be accessed --> [here](#)

## REPORTING & TRACKING

### Cancellation Reason Survey

*Exerp > Extract Wizard > Club Reports > Cancellation Reason Report*

This will give us some great information as to why some of our members may be leaving the club. Are there areas of our club that we can improve that may reduce our percentage of leavers? Is there anything we can do to further support our members before it gets to a stage of them considering their cancellation.

This report also gives us information as to whether they would recommend Fernwood to a friend and how likely they are to return in the future once their circumstances change?

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## Forecasting your Cancels

*Exerp > Extract Wizard > Club Reports > Cancellation Report*

The cancellation report in Exerp allows you to pull your predicted cancelled members for the existing month or month ahead.

We recommend doing this weekly.

It is an important step in formulating sales and growth targets.

Forecasted cancels plus desired member growth = sales target.

Give your club a buffer of an additional 5 members to be included in the member loss figure due to reasons such as debt collection, transfer outs and special circumstances etc.

## Average Length of Stay Report - SUPERSET

*SUPERSET > DASHBOARDS > AVERAGE LENGTH OF STAY*

The Average Length of Stay report gives you an indication of how long your members are staying and displays the difference between contract terms and/or if a member is using a paid-for service in club. This report only looks at subscriptions that have been cancelled within the chosen date range. For example this will default to the last 12 months and will only calculate the average length of stay of memberships that have been cancelled within the last 12 months. The Last Visit Date field is the average number of months it takes between a member's last visit and processing their cancellation. Please note this report is displayed in months.