A guide to using TalkBox

About TalkBox

Owned by parent company, Impact Data, TalkBox is the email and SMS generator used to schedule national promotions on behalf of clubs. It also manages some of our automated communications: welcome email journey; member visit journey; etc.

TalkBox is also used by Fernwood clubs as the communication system to schedule their local marketing emails and SMS campaigns.

TalkBox is predominantly a marketing communications system however, non-marketing communications can also be sent via TalkBox for urgent communications. These types of non-marketing communications can also be sent via Exerp; it is at the club's discretion which platform they choose to use. Keep in mind, TalkBox is an overnight system, meaning the data does not update until the following day, which means clubs may opt to use Exerp for urgent communications.

Responsibilities

Marketing emails and SMSs:

To comply with ACMA, all persons receiving a marketing email or SMS must have subscribed to receive the communications, and your communications must:

- Identify you as the sender
- Contain your contact details
- Make it easy to unsubscribe

Anyone using TalkBox must ensure they are adhering to ACMA regulations:
https://www.acma.gov.au/avoid-sending-spam#how-to-comply

National Support Office

National marketing communications and automated communications are managed by NSO. Clubs will be notified of any national marketing communications planned on behalf of clubs via the weekly What's the

Goss update. Clubs can choose to opt out from national marketing communications by emailing the designated person identified in the weekly What's the Goss update.

Clubs

Local area marketing campaigns, events, news, updates, and service communications are managed by each individual club. Templates are provided in all TalkBox accounts for clubs to utilise for their local communications. From time-to-time, clubs will be provided with new templates to use for local communications. It is each club's responsibility to update these templates as required to meet local offerings, terms and conditions etc.

If a contact misses a communication due to status (unsubscribed), bounce, incorrect email/phone etc. it is the club's responsibility to resend this communication to the contact.

Staff emails

Clubs can use TalkBox to communicate with their staff. It is each club's responsibility to ensure staff profiles are kept up-to-date in Exerp, including when a staff member leaves the company. Once clubs remove their staff access in Exerp, block their login and make any further updates to remove the staff member from the system, then this person should be removed from the staff target audience group in TalkBox.

It is each club's responsibility to verify this has occurred, and that the staff member is no longer able to receive communications via the staff target audience group.

Best practice using TalkBox

Exerp - The source of truth

Fernwood TalkBox accounts are updated daily by the Exerp integration. Each day the Exerp data overwrites existing information in TalkBox. Your account is in 'read only' mode which means that updates to contacts can only be made through the integration. This ensures that data is only managed in one place (Exerp) and updates flow automatically to your TalkBox account the next day.

For this reason, all clubs need to ensure the data they enter into Exerp is correct.

- Correct email and phone number at time of joining or enquiring
- Members and trials must swipe in each time they visit (for updated visitation data)

The system doesn't cope with duplicate mobile numbers or email addresses. For this reason:

- When a new member joins, staff members must ensure the new member doesn't already have an existing enquiry or profile within Exerp. If not, this will create a duplicate profile within the system and the member will not receive communications.

Accessing your account

Each club will receive a unique login to their own TalkBox account. Each club should have one nominated TalkBox user to ensure communications are handled by someone trained and knowledgeable in the system.

Clubs can login here: https://talkbox.impactapp.com.au/

Login with your username and password. Never share this information with anyone.

Training & support

During the re-launch of TalkBox to the Fernwood network, Impact Data ran TalkBox training. This information would have been familiar to most clubs in the network. If you missed the training, please ensure you watch the recorded session available on Velpic and read this manual in detail. These resources should tell you everything you need to know about using TalkBox.

If you have any questions about TalkBox, including logging in, how to set up an email, or any other troubleshooting issues, please refer to this manual and the training video first. If you are still experiencing some issues, please log them through Helpdesk. Our Helpdesk can assist with most troubleshooting issues quickly. Logging tickets in Helpdesk also allows us to review any common issues that may be linked.

If you are experiencing a technical issue, please report this to Talkbox Support directly:

support@impactdata.com.au

When submitting a ticket to Fernwood Helpdesk or TalkBox Support, please ensure you provide as much detail as possible regarding the issue, so we can attend to the issue ASAP.

Communications best practice

The best way to improve customer engagement with communications and minimise unsubscription numbers is to send relative and targeted communications to your members. Here are some additional guidelines we recommend:

- Avoid sending more than 2-3 communications on the same topic
- Avoid sending multiple communications to the same recipient list within a short timeframe
- Segment your communications by target audience group to target specific groups with tailored offers/information
- Use personalisation in communications where possible and relevant

- Avoid image-only emails (these can increase load time for customers and trigger spam filters). Aim for a balance of text and images.
- Only use NSO approved and on-brand imagery, and ensure it has been sized appropriately to reduce email load time
- **Always** send yourself a test email or SMS before launching a campaign. This ensures you can review links, images and copy before sending an email or SMS.
- If sending the same email to multiple target groups, use a different subject line to test which subject line offers the best results for future scheduling
- Ensure your members and trials are always recording their attendance at the club. If attendance is not recorded, the data captured will not reflect their status. As a result, important automated communications and marketing opportunities will be missed.

Click here to read our Support article 'Improving Email Engagement'.

Anyone using TalkBox must ensure they are adhering to ACMA regulations: https://www.acma.gov.au/avoid-sending-spam#how-to-comply

SMS guidelines

Include your Fernwood club location

Text messages from Fernwood will appear as from 'Fernwood'. Remember to specify which Fernwood you're from, e.g. Huge savings at Fernwood Liverpool etc. Prospective members may have trialed or enquired at numerous Fernwood clubs and receive offers from various locations, so you need to make sure you let them know which Fernwood is sending the communication.

Keep it short

Not only are short texts more likely to be read, they'll cost you less too! Each SMS from TalkBox costs 2.8 cents + GST. The price increases if you send more than one SMS part. This isn't much of an issue if you're sending an SMS to one contact, but it can become costly if you're sending to 300+ contacts.

Emojis

Emoji's can be a fun way to build rapport in your communication, however it is imperative to know 1 emoji takes up 92 characters. Hence, if you would like to use one, please be mindful of your character count.

Use limited time offers

Text messages are very effective when they include a limited time offer. E.g. 'Only 10 spots so call quickly' or 'Offer ends this Sunday.'

Include a phone number

Include your phone number so recipients can click on it within the text to call you straight back. Including your contact details is also a requirement under ACMA regulations.

Staff your reception desk

If you're sending out a text message with a really great offer, make sure you have your best sales staff on reception ready to answer any calls that come through straight away.

Choose your send time wisely

Consider your demographic before scheduling an SMS. Does your gym attract young professionals or mums? Consider this when scheduling a communication. Does an email/SMS received at 9:00AM or 9:03AM feel more personalised to the recipient.

Don't send too many communications

If you annoy your database with too many text messages, or send text messages at inappropriate times (i.e. too late at night or early in the morning), your contacts are likely to unsubscribe. Protect your database by only communicating sparingly and ensuring the text messages you send are of value.

You also need to ensure you are adhering to ACMA regulations and guidelines.

Email guidelines

Use subject lines that sell

The most important part of your email is the subject line. If your subject line is not engaging, your email won't be opened. Think about how many emails you receive each day in your inbox. Which ones do you open, and why?

Remember most people now read their emails on their phones, so aim to get the majority of your message across in the first 5-6 words of the subject line as the rest likely won't be seen in mobile view.

Personalise your emails

Even when bulk sending to a segment, consider using the [First name] merge field to give your email a personal touch. Please refer to the FAQ section for how merge fields effect character counts.

Create a sense of community

One of the things that makes Fernwood so special is our warm and inviting environment. Use a welcoming tone in your emails. If you're referring to a particular class, perhaps even write '5pm spin with Tracey'.

Consider your send time

Please be aware of the communications NSO sends on your behalf; we don't advise sending around these times. The send time of our promotional emails are detailed in the marketing toolkits from NSO and the weekly What's the Goss updates – please mark these dates in your calendar.

Consider the times when you check your emails, these are the time you should be considering communicating with your audience.

Keep it professional

It's fun to use different fonts and colours, but it's essential stay on brand with Fernwood. People expect to see a certain level of professionalism from a national franchise organisation.

The same goes for spelling. If you don't know the difference between 'your' and 'you're', get someone who does to help you write your communications. Always have at least two people review any communications before you hit send.

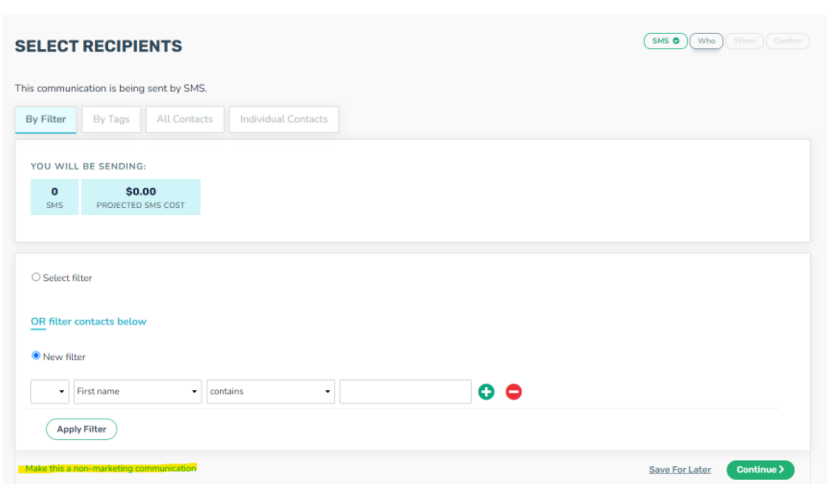
You also need to ensure you are adhering to ACMA regulations and guidelines.

Non-marketing communications

Clubs have the ability to send non-marketing communications via TalkBox (and Exerp). Non-marketing communications are sent to contacts who have unsubscribed from marketing communications. There are strict regulations around what constitutes a permittable non-marketing communication, and these types of emails and SMSs should only be used to communicate urgent communications that exclude any type of marketing messaging. A non-marketing email does not have an unsubscribe function.

It is each club's responsibility to ensure all communications comply with Australian laws and regulations.

<u>To make your communication a non-marketing one, untick 'marketing message'</u>



Terms & conditions

It is essential that your T&Cs are relevant and up-to-date with the communication you're sending. This will avoid miscommunication to members about specific promotions. **Update T&Cs in the footer of your email**. T&Cs should be included in every communication that includes an offer, promotion or sales-related messaging.

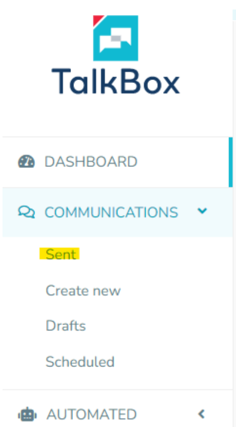
Dashboard

When you log into your TalkBox account, the first screen you will see is the dashboard. From here you can navigate to any area of TalkBox and also see a summary of your account.

Communications

Sent

To view sent communications, click Communications > Sent.



Create new

To create a new email, click Communications > Create new.

You can create an email template using a pre-existing template under 'My Templates'. Only use templates provided by NSO that have the correct styling and formatting.

When head office creates email templates, you will be able to find an editable version under the 'My Templates' tab. It's easiest to search for a template you're looking for using the CTRL + F function (or COMMAND + F for those using Macs).

Once you open up a pre-existing template, you will be able to review the email and make any changes/updates to copy, images, links etc. To retain brand consistency, the Fernwood banner and social icons must not be changed.

Depending on the email you're sending, you may or may not need to change:

- The image/s
- Alt text (on image/s)
- The body copy
- The call to action
- The sign off
- The terms and conditions

Saving your email as a template

1. Once your email is complete, select the drop-down tab next to 'Save and Continue'
2. Then click on 'Save as template'
3. Give your template a relevant name and press 'Save'. It's important to give your template a naming convention that will make it easy for you to find it again, e.g. 2020 September FIIT30 promotion current members.

Email content

Drag and drop content into your email template, then customise to suit your email:

- Heading: Text heading
- Text: Add the main copy of your email
- Merge Fields: Pre-filled information drawn from the recipient's profile
- Image: Upload approved brand imagery (sized 600x300 or 600x600 px and less than 200kb)
- Two columns: Add two columns of copy
- Two images: Add two images side by side
- Right caption: Image with caption on the right
- Left caption: Image with caption on the left
- Separator: a coloured line that separates content in the email
- Social media: social media icons (not usually required as Fernwood social icons are built into the emails)
- Button: add copy and URL to activate the button
- Image grid: a collage of images
- Voucher: N/A for Fernwood
- NPS survey: A member satisfaction scale. More info available on the NPS survey below

Also available:

- Hyperlink
- Alt text (the text that appears when an image doesn't load)

Drafts

To view saved drafts, click Communications > Drafts

From here you can continue editing a saved draft, or delete your draft.

Scheduled

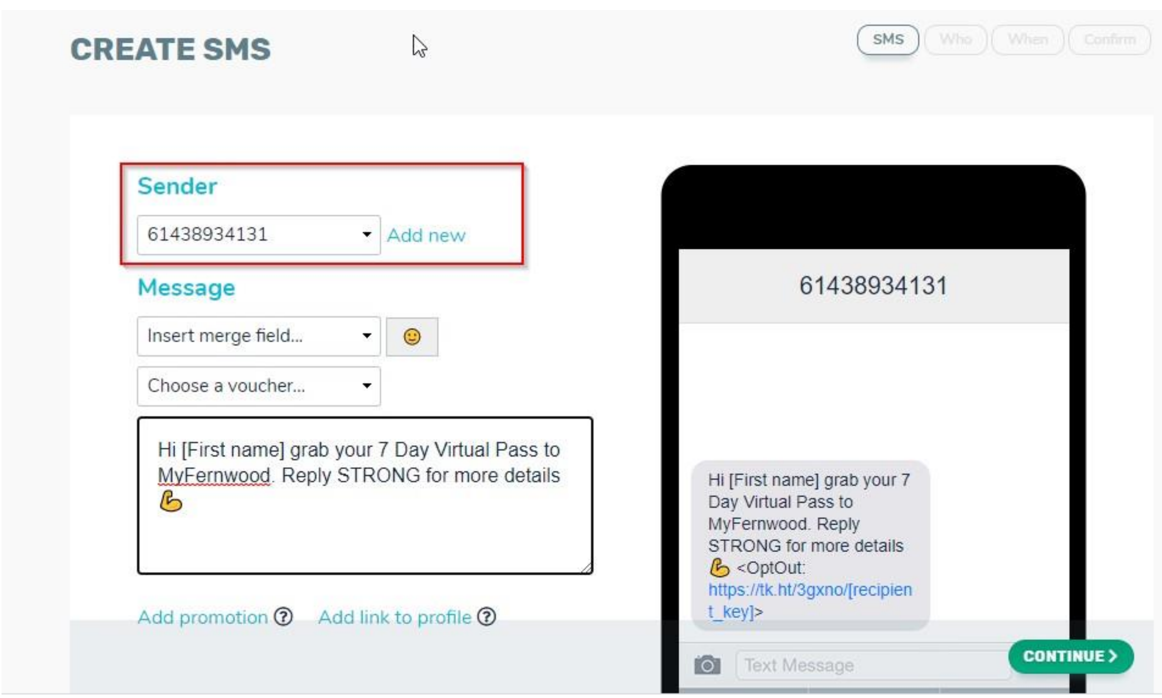
To view scheduled communications, click Communications > Scheduled

From here you can view communications that are going to be sent at a future date and time. This does not include automated communications.

2 Way SMS

Please refer to the steps below on how to engage with a 2-way SMS with leads and members.

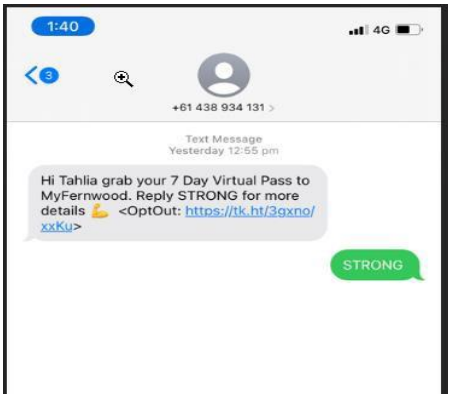
1. Send your communication out via your Talkbox account, by selecting SMS.
2. Ensure you have the **sender number** selected as **61438934131** <u>not</u> the Fernwood number.



PLEASE NOTE: For the initial bulk SMS you are doing it is important to keep this as a marketing SMS so that it includes the Opt Out link. This can then be removed from the SMS once the contact has engaged in a 2-way SMS conversation.

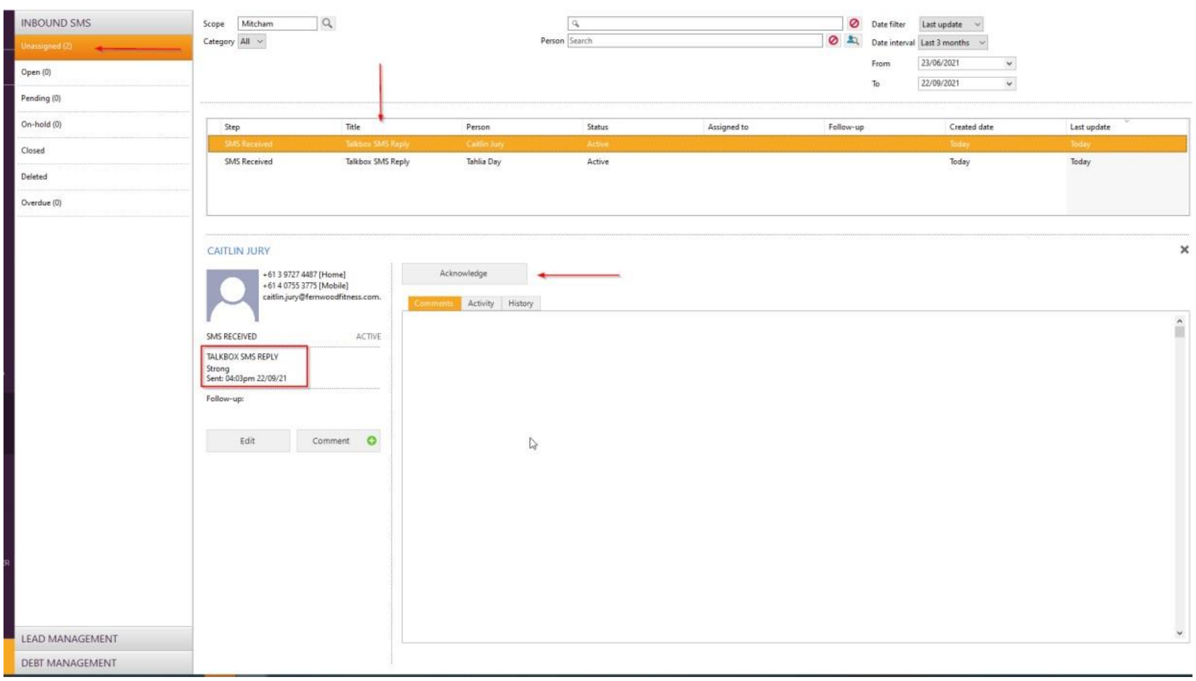
3. Select your filters/contacts as per normal in Talkbox and run your campaign as per normal.

Once the contact replies and engages in the 2-way SMS



1. The contact will be able to reply to the SMS to engage with the club.

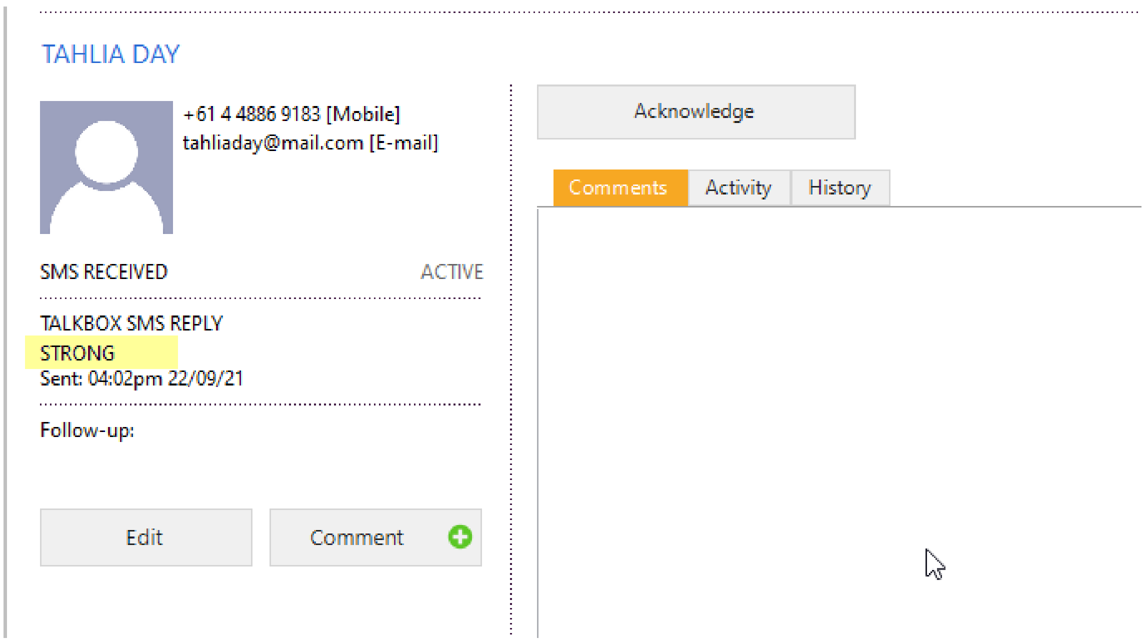
2. This response will push through to a new section in the CRM under INBOUND SMS where can see all responses to the SMS.



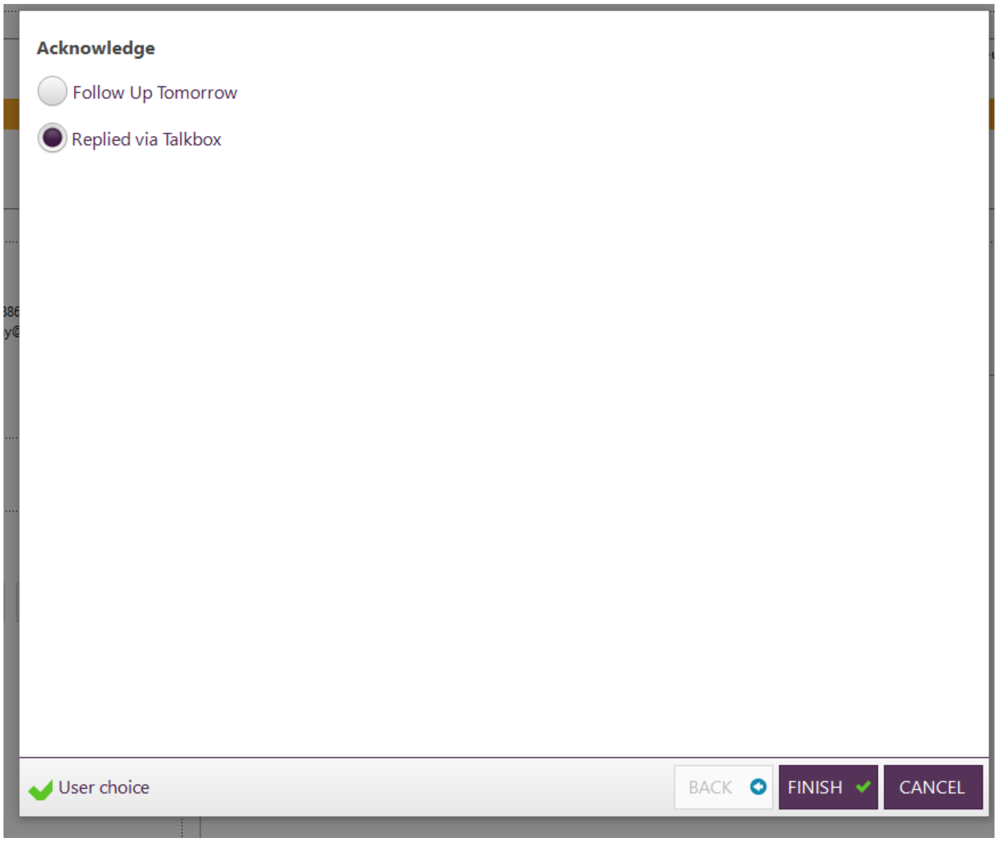
This is a new section to the CRM which sits as its own tab so we can quickly and easily see any direct responses from the SMS.

a. The responses will come through as an Unassigned task in the CRM with the title **Talkbox SMS Reply.**

b. This task is simply to notify staff that there has been a response and that they either need to reply to this contact directly in Talkbox or follow up with a phone call. Staff will be able to see the response of the SMS written as a note in the task.



c. It is important that when staff are actioning the response to the lead or member, that they click on **Acknowledge > Replied via Talkbox > Finish** to close of the task.



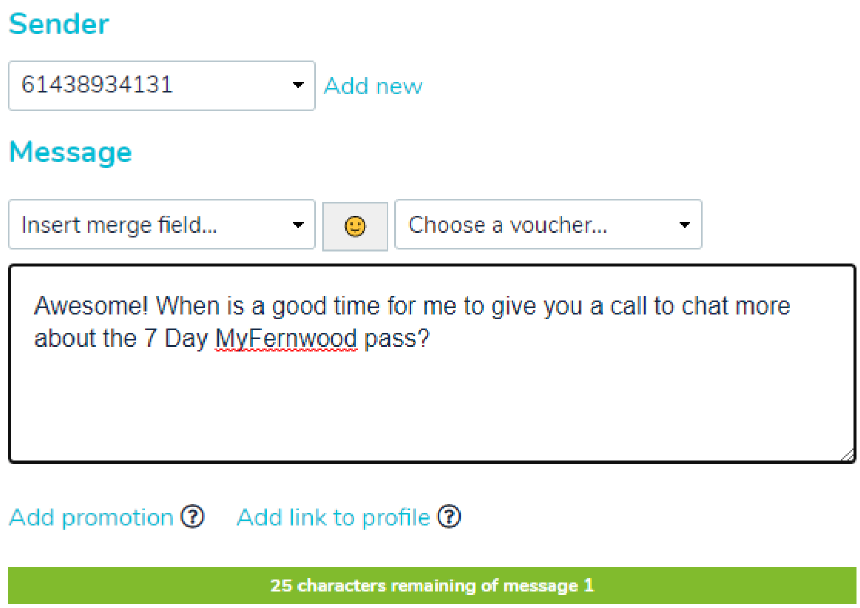
PLEASE NOTE: All Talkbox replies must be closed off in the CRM once you have actioned them. If a task is not closed off for a contact and they reply for a 2nd time, their latest response will fail to come through as there is an existing task there.

There CRM tasks will be created and updated every 20 minutes.

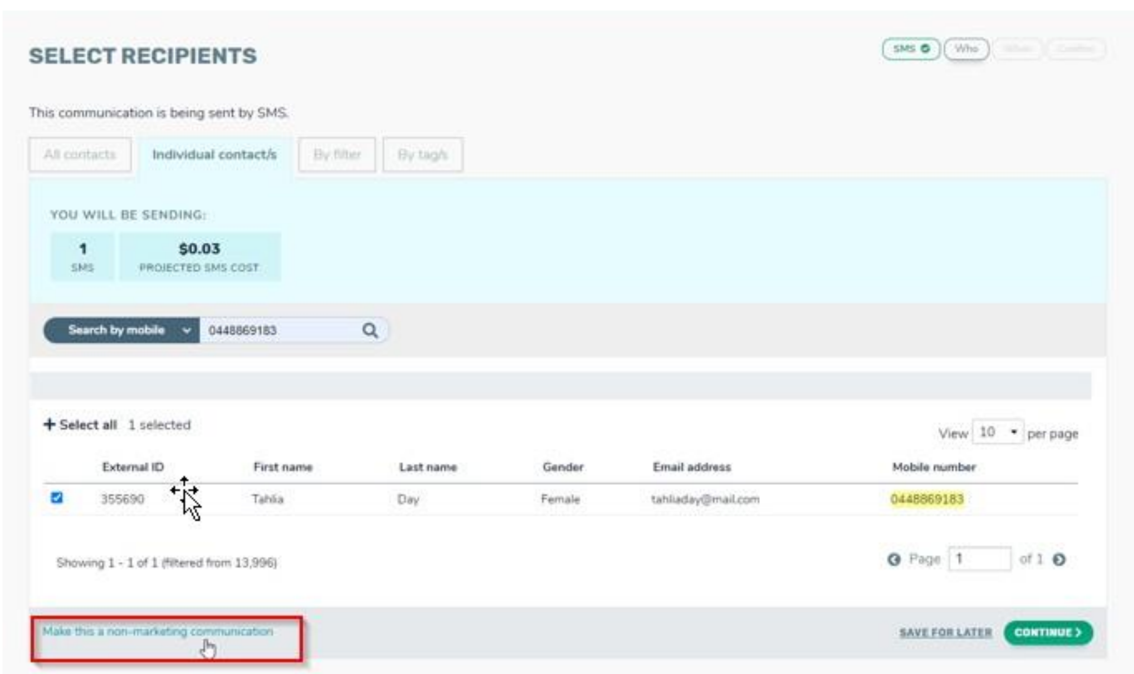
Replying to the contact – MUST BE DONE VIA TALKBOX.

Once a contact has responded to the SMS and you wish to engage in a 2-way conversation with them, all replies to the contact must be done through Talkbox.

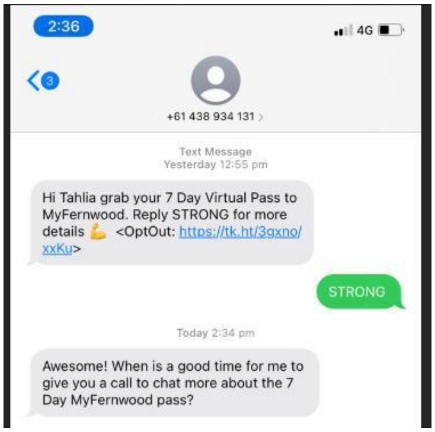
1. Open up your club's Talkbox account and create new communication for SMS.
2. Change the sender to **61438934131** and type out your response in the Message field.



3. Search for the contact your engaging with by searching for them in Talkbox. It might be easy to copy and paste the external ID from their Exerp profile as a quick way to find the contact.
4. During this step, it is also a good idea to mark this as non-marketing communication so that it removes the opt out link from the message so when the contact receives the response it looks like a genuine 2-way conversation with the club.



5. Continue through to send off the SMS response to the contact.

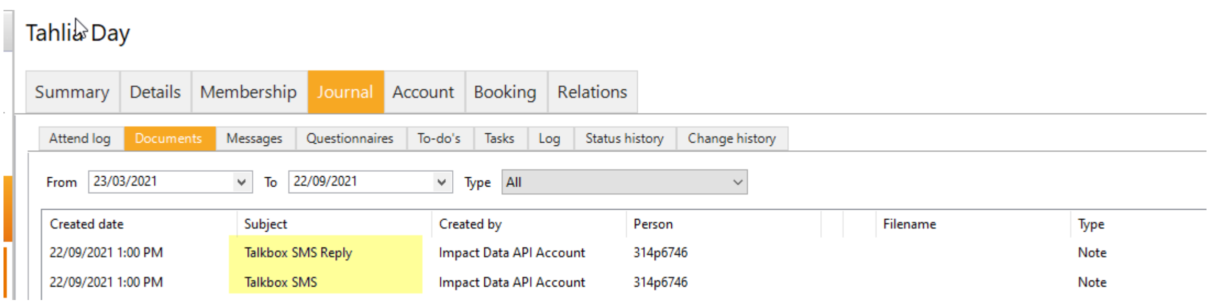


6. When the contact responds, this will come through as a new CRM task for INBOUND SMS so that you can continue this process until the conversation has been completed.

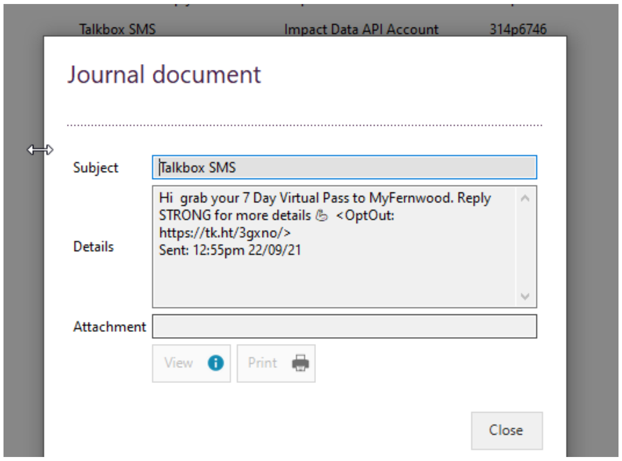
SMS Journal Documents

As part of this work, you will also see all Talkbox SMS and SMS replies from the contact, these will now be recorded as a journal document on the lead/member's profile so that you can have historic record of these communications to lead/members.

These will be uploaded every 20 minutes against the person profile.



Simply click on the document to view the content of the SMS and the date and time stamp of the communication.


Talkbox SMS
Impact Data API Account
314p6746
Journal document
Subject
Talkbox SMS
Details
Hi grab your 7 Day Virtual Pass to MyFernwood. Reply STRONG for more details <OptOut: https://tk.ht/3gxno/>
Sent: 12:55pm 22/09/21
Attachment
View
Print
Close

Automated

Birthday

An automated birthday email is currently set up for clubs in Exerp.

Recurring

A recurring communication that can go out every day, week, month or year.

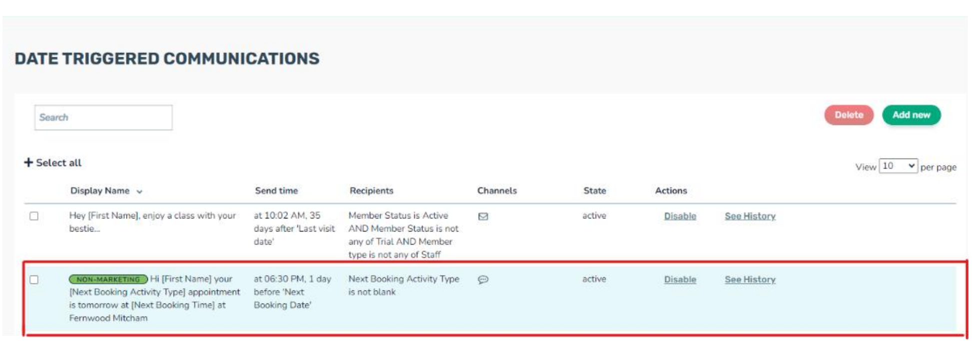
Date-triggered communications

Please refer to the automated communications manual on the Intranet for more information regarding what types of automated communications have already been scheduled on behalf of clubs.

To create a new date-triggered communication, go to: Communicate > Automated > Date Triggered > Add new Date Triggered Promotion

1. Depending on the date-triggered communication you want to set up, choose email or SMS.
2. Compose your email or SMS as per normal and select continue.
3. Select recipient as per normal and select continue.
4. Select your send time:
    a. The ‘Field name’ is your trigger event. You can choose a trigger event based on numerous events in the life of someone’s membership or enquiry journey.
    b. The ‘Day’ field allows you to decide when you want to communicate with this audience, e.g. 1 week after sign-up date. The ‘Time’ field allows you to set a time of day for the email or SMS to be sent.
    c. You can choose to make this communication repeat annually, e.g. a Happy Fernwood Anniversary email 1 year after member join date.
    d. When you are happy with your send criteria, continue through to the ‘Confirm’ screen to review your data, send a test to yourself, and ‘Confirm’ the date-triggered communication

Clubs can disable and edit existing date-triggered communications from this section of TalkBox. However, editing of the below message will affect SMS Booking Reminders.
(Please contact Helpdesk if you would like this specific SMS altered)



Contacts

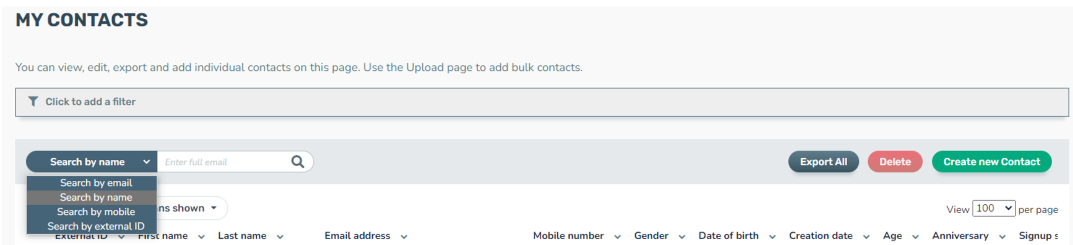
My contacts

You can view a contact's profile by clicking Contacts > My contacts

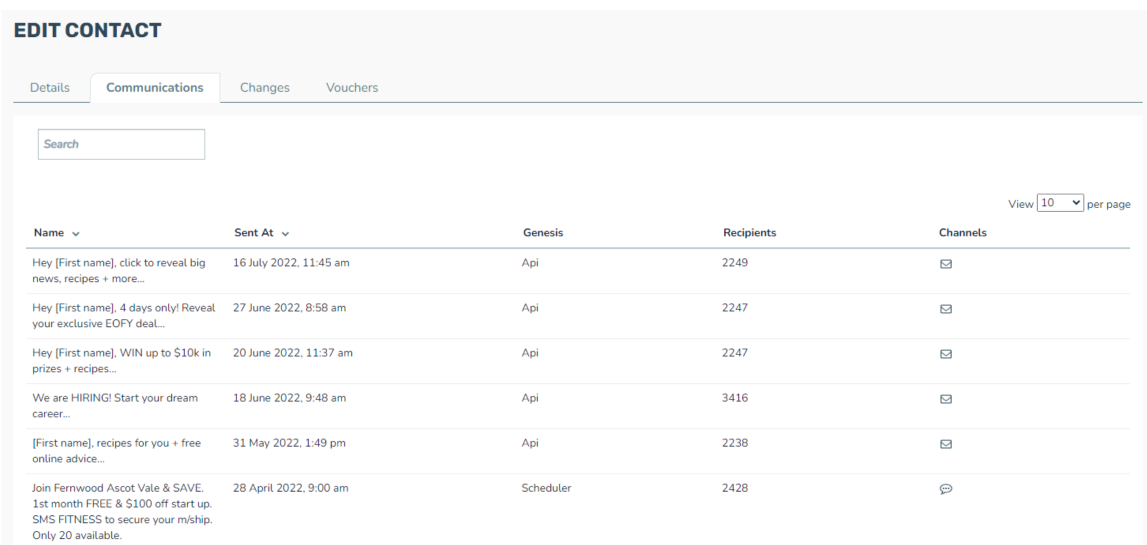
This will display their marketing preferences and communications history. Please note, all updates to a contact's profile should be made in Exerp.

View Contact's Communications History

1. Select by name and type in your contact's full name.



2. Click on communications tab to view the contact's past communications.



Filters

You can create a filter by clicking Contacts > Filters

Filters are a group of contacts saved into one group filter that you would use regularly for communication sends.

There are three types of searches you can use to create filters: ‘AND’, ‘OR’ or ‘NOT’ searches.

A) Using ‘AND'

An 'AND' search means that your database members will be selected if they meet both criteria.

For example, using the criteria 'Gender is female' AND 'Age is older than and including 21' we can create a segment for our ‘Girls Night In’.

B) Using ‘OR’

An 'OR' search means that your database members will be selected if they meet either criteria.

For example, using the criteria 'Favourite food is beef' OR 'Favourite drink is beer' we can create a segment for our Steak & Beer Club.

C) Using ‘NOT’

You can target a group of customers by using a ‘NOT’ search to exclude contacts who may overlap across criteria. For example, we want to select our current members, but not if they only have a trial membership.

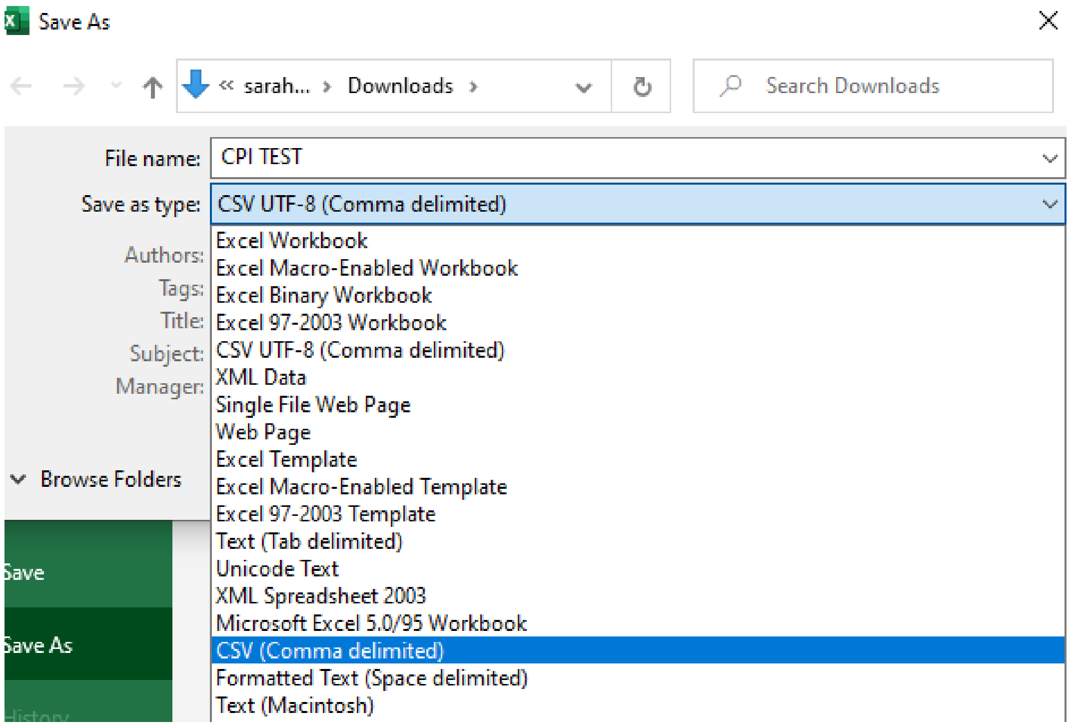
Tags

You can create a tag by clicking Contacts > Tags

Tags allows you to identify a group of contacts without making any changes or additions to your field structure. Because of this, tags are perfect for single-use applications like identifying members for a one-off communication.

Importing contacts from Exerp

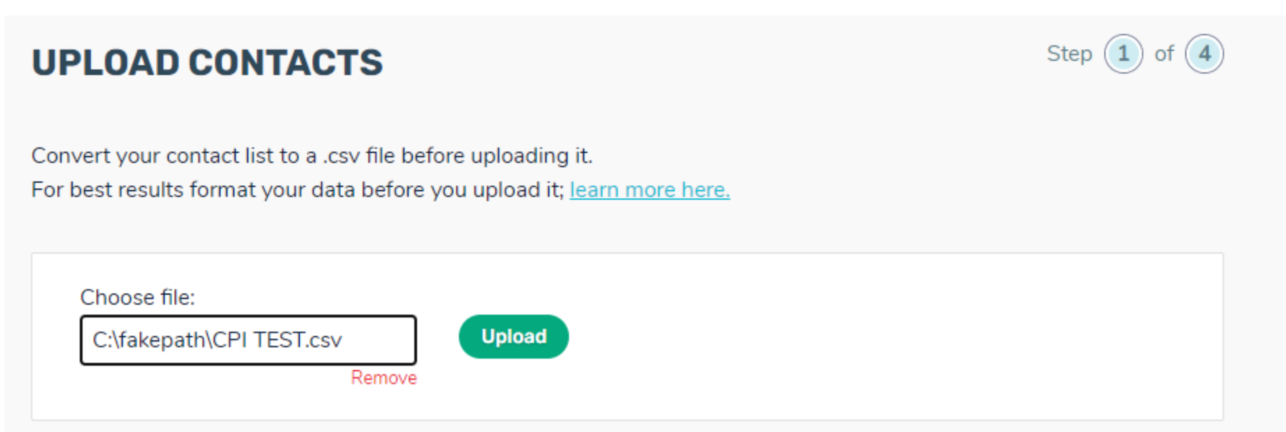
1. Export the relevant report from Exerp preferably in CSV format to eliminate possible formatting issues when uploading to Talkbox. If you’re unsure how to do this, you can export your excel spreadsheet to CSV format by using the Save As function and selecting CSV.



2. Ensure your spreadsheet has **External_ID** as a column and remove any columns that have unnecessary/irrelevant information as this will slow down your uploading process.

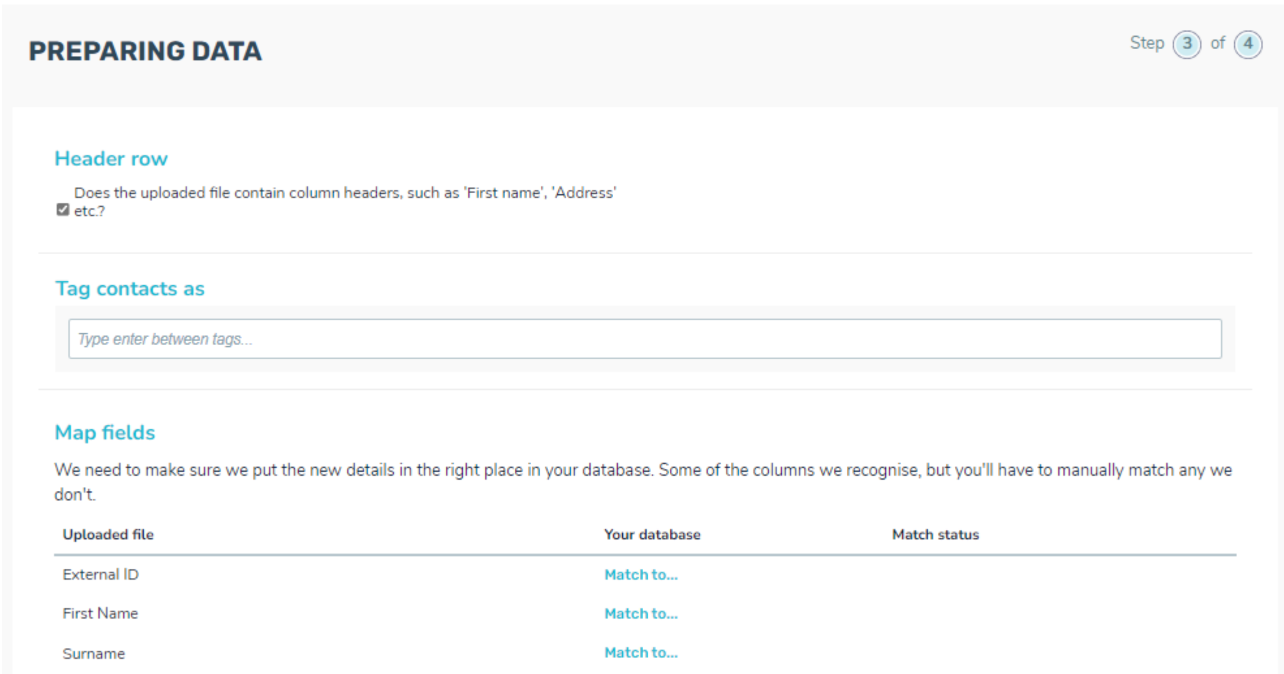
A	B	C	D	E	F	G
External ID	**First Name**	**Surname**	**Last Visit Date**	**Days Since Last Visit**	**Email Address**	**Subscription Name (Membership Type)**
123456	Test	123	25.06.2022	6	test123@fernwoodfitness.com.au	12 Month Ongoing

3. On the page Contacts > Upload Contacts, click on the text box to select your file and click upload

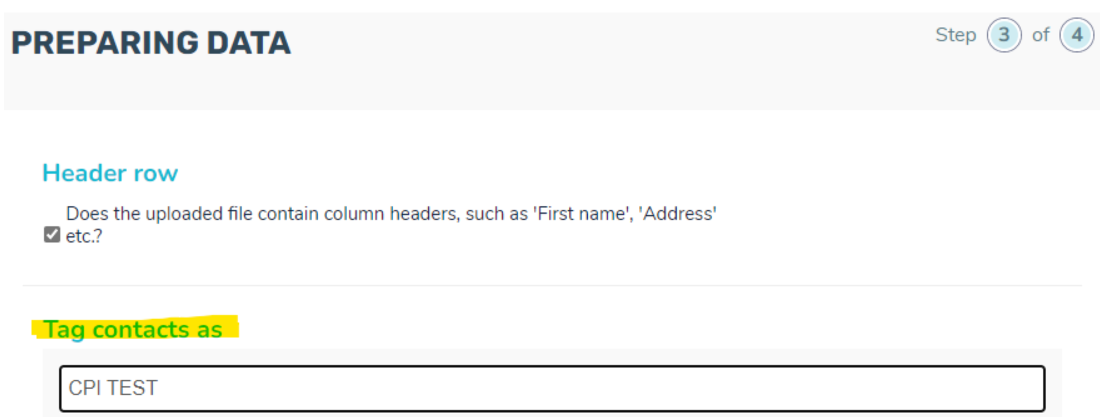


4. The Preparing Data stage of the process requires checks in 3 sections of the page:

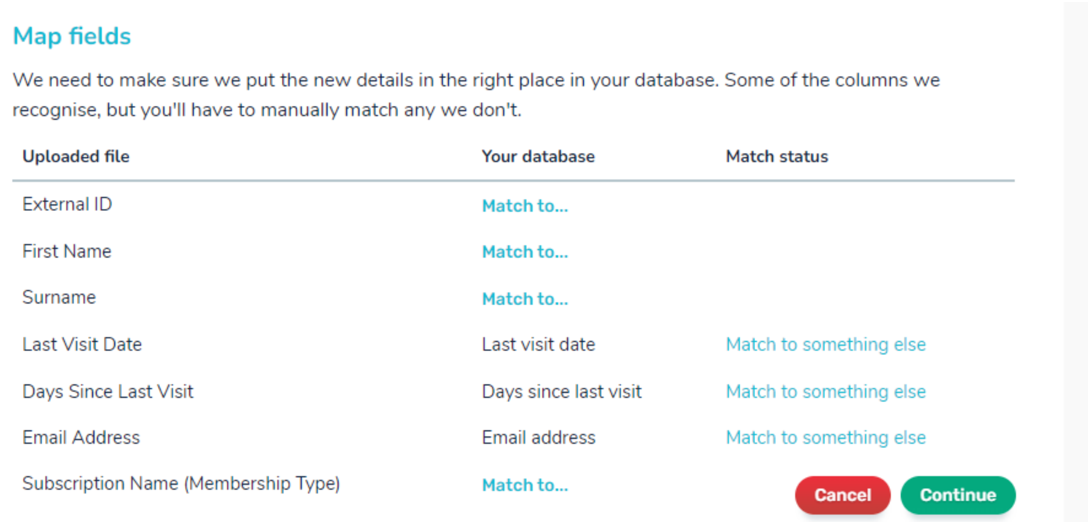
   a. Header Row
   b. Tag Contacts As
   c. Map Fields



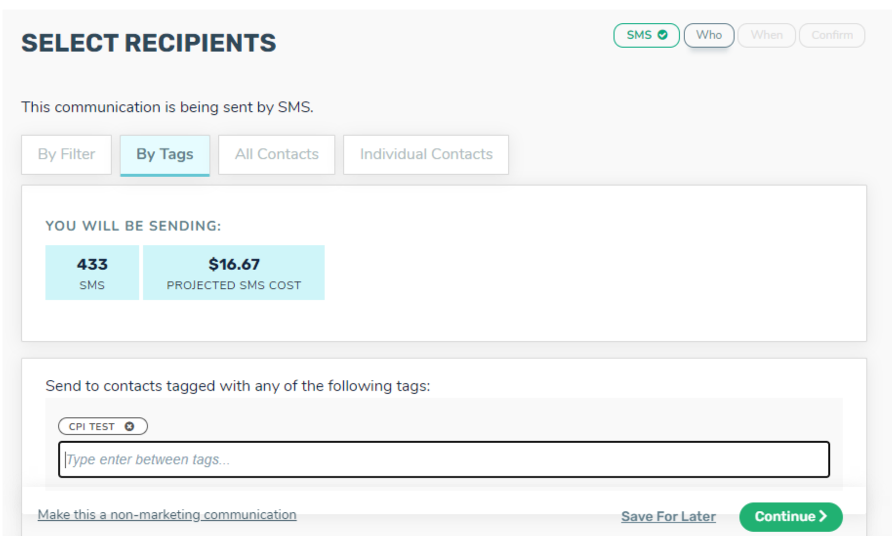
   a. Header Row should be ticked.
   b. It is imperative to name the tag as relevant to your data list as possible. This will assist in recognising your tag list for future communications.



   c. Fields may automatically be linked from the existing Talkbox database to your uploaded spreadsheet. If not, you must link External_ID with External_ID.



d. Click on the continue button to complete the process.
e. To send communication out to this tagged group. Follow the standard approach to sending to communication however, select BY TAGS and type in your tag as shown below.



Fields

You can view contact field information by clicking Contacts > Fields

Marketing preferences

Please note: all marketing and non-marketing preference changes to a contact's profile should be made in Exerp.

If a contact requests to be unsubscribed or resubscribed to marketing or non-marketing communications, this process should always be completed in Exerp. The preferences will then filter into TalkBox overnight.

Only marketing preferences will display in TalkBox.

If for some reason the subscription status is not updating, you can manually unsubscribe, or request to resubscribe a contact if they have requested this. Report this issue to TalkBox Support.

To unsubscribe a contact

1. To unsubscribe a contact in TalkBox, go to Contacts, then search for the contact's name.
2. Click on their name to view their profile.
3. At the right side of the profile view page, untick 'Subscribed' to either SMS or email (depending on what the contact has requested), then click save.

To resubscribe a contact

1. If someone requests to be resubsrcibed, re-tick the 'subscribe' box and the member will receive an email or SMS requesting to activate their account again. You can only do this if someone requests this action.

Filtered contacts

In each club TalkBox account, filtering contacts before each send uses the same process as when creating a segment.

You can choose to include recipients:

- ‘Who meet **any** of these criteria’ e.g. who are members **OR** trials

Or

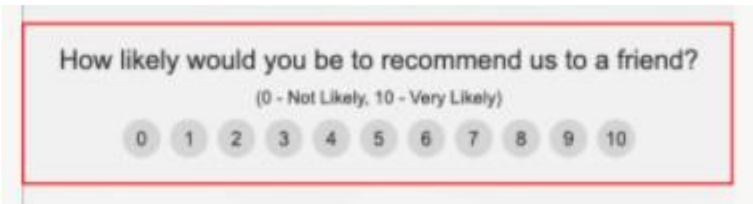
- ‘Who meet **all** of these criteria’ e.g. who are enquires **AND** have an enquiry date after

Tools

NPS Survey (this is the only section of Tools clubs will use)

Net Promoter Score (NPS) is a benchmark used to measure customer loyalty and satisfaction. It asks customers not to score the business but to rate their likelihood to recommend the business to a friend. It is calculated based on responses to a single question: 'How likely would you be to recommend us to a friend?'

You can include a simple NPS survey in any TalkBox email by dragging the 'Feedback' block onto your email.



Respondents rate between a scale 1-10 and are grouped as promoters, neutral or detractors.

Promoters (9 or 10)

Neutral (7 or 8)

Detractors (0 to 6)

The NPS score is the difference between the percentage of promoters and the percentage of detractors. The NPS is not a percentage but as a number between -100 and +100.

For instance, if you have 25% promoters, 55% passives and 20% detractors, the NPS will be +5. A positive NPS or any score greater than 0 is considered 'good', and above 50 is considered 'excellent'.

When to use NPS

It's a good idea to include an NPS survey after a customer has significant interaction with your business. These include:

- After new customers sign-up, to assess their first impressions
  - **Please note, the NPS survey has been included in the week 2 and week 6 welcome emails, set up by NSO on behalf of clubs**
- After a purchase or a visit
- After a milestone visit
- At regular intervals such as every 6 months
- After the release of a new menu, new product or change of management

How to use NPS for your business success

NPS provides valuable insights into your business. Customers have the option to add a comment after submitting their score, giving you further information about their experience. TalkBox can automatically send a follow-up communication to a customer after an NPS survey is received. This can be a different communication for the different categories, for example:

- Promoters: Direct them to leave a review of your business.
- Passives: Ask what could be improved, perhaps include a voucher to invite them back and get a second chance.
- Detractors: SMS or email and include a voucher or discount code to be used if they return for another visit. You may also want to follow up directly with a phone call.

Learn how to set-up these communications below.

Clubs need to set up their own NPS email responses.

How to add an NPS survey

You can easily add a feedback block to any communication you send from TalkBox. This will allow your contacts to provide feedback about your business by clicking on a score option within the communication (0 – 10) then additionally providing written feedback if they choose to. The score and written feedback are made available to you in TalkBox and can be sent to you via email. The score can be used to calculate a Net Promoter Score, known as NPS.

The question the survey asks is: how likely would you be to recommend us to a friend?

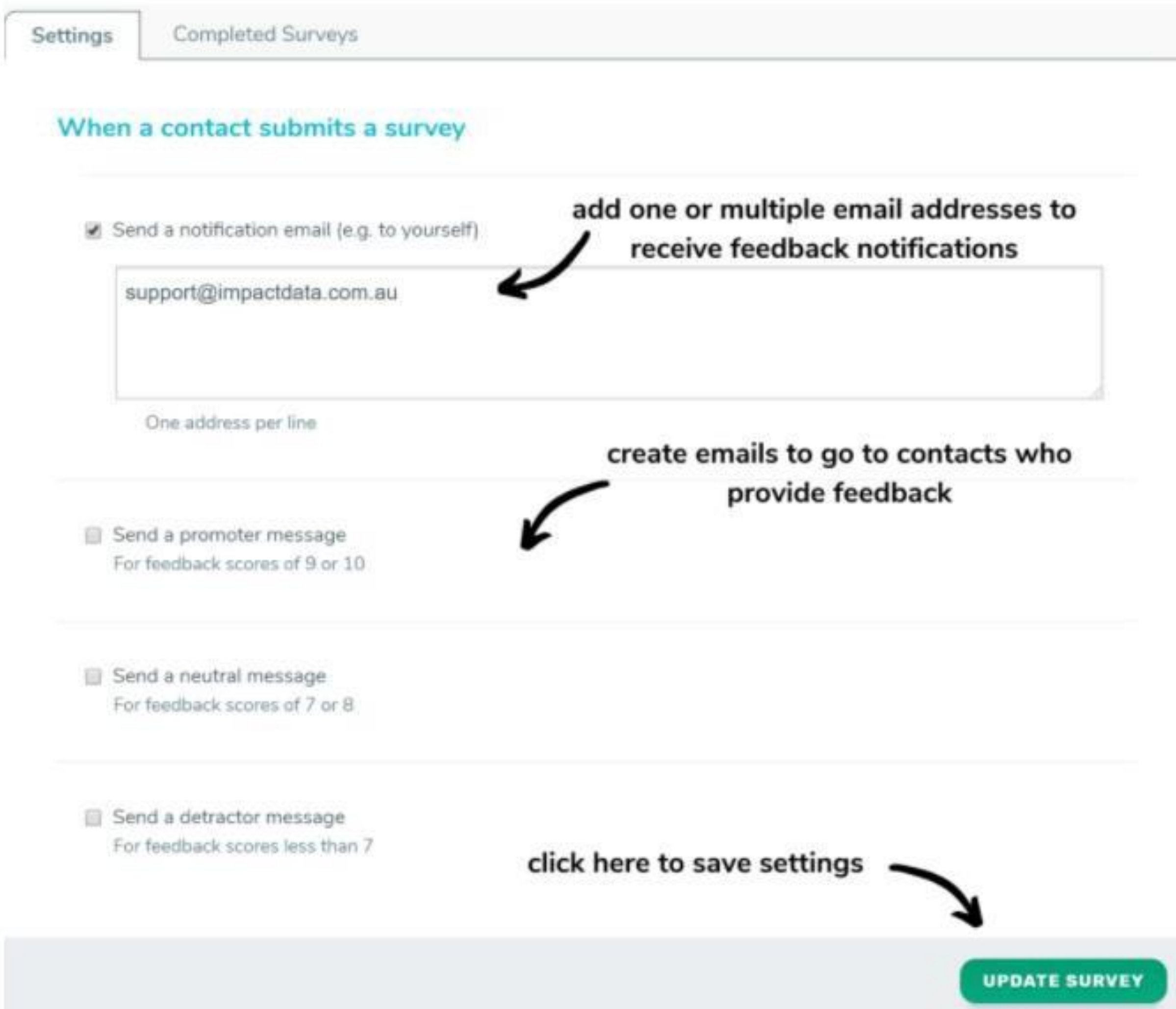
These steps show how to configure a feedback survey and add it to a communication in 3 steps.

Navigation: Tools > Feedback surveys

Step 1: configure your feedback survey

- Add an email address to receive notifications to (optional).

- Setup communications to trigger based on a contact's feedback score (optional).



Step 2: add the feedback to a communication

- Navigation: communications > create new.
- Drag & drop the feedback block (NPS survey) in the promotion editor.
- Complete the sending process and send your communication.

Step 3: review feedback & scores

- Navigation: tools > feedback survey > completed surveys.
- Review scores and feedback comments

Reports

Communications

This will show you your sent report for all adhoc email or SMS sends. You can view individual reports by clicking on the specific email or SMS.

NPS Survey

This will show you your NPS feedback report, displaying all results from any contact who has provided feedback.

FAQs

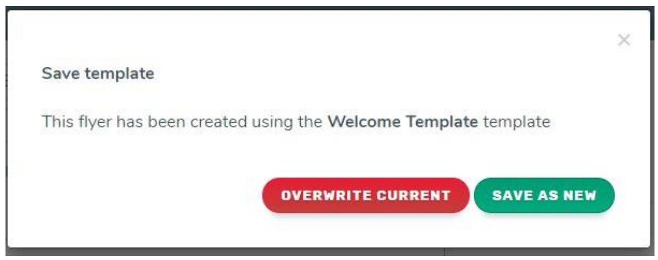
How do I use an existing template?

To send a communication using an existing email template you must begin creating a new communication (e.g. navigate to the Communications tab and select 'Create New').

You'll find all existing templates for your account under the *'My Templates'* tab.

Once you have selected the *'My Templates*' tab, select the template you wish to use and it will load in the edit screen.

In the edit screen you can edit and update the template by selecting the blocks within the template and referring to the settings panel.



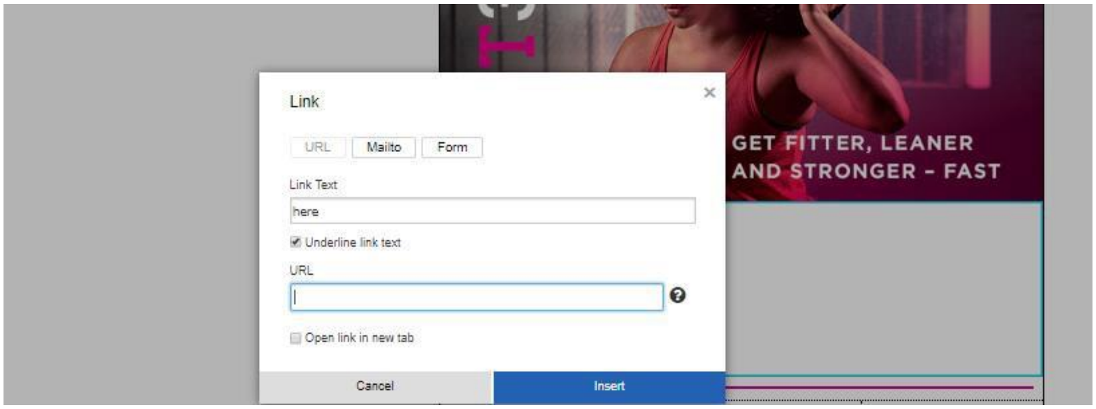
If you have made changes to an existing template you can **save it as a new template** by selecting the drop-down arrow next to the *'Save and Continue'* button and selecting Save as Template. When the option arises to 'Overwrite Current' or 'Save as new', select 'Save as new', otherwise the existing template will be lost.

How do I add a hyperlink to an email?

To add a link to a survey or webpage, start by highlighting the word you want to link. An example of this might be: Click <u>here</u> to complete the survey. In this instance, highlight the word 'here'.

Then, in the settings panel, select the link button and click insert link.

Then, the link box will appear (see screenshot below). The link text will be the word that is highlighted, and the URL is where you can add your URL. Click insert link.



How do I manually re-send the Welcome emails?

To manually send any of the welcome emails to an individual or group of recipients, you will need to begin a new communication (by navigating to the *Communications* tab and selecting 'Create New') and select the saved template.

You will find the Welcome templates under the *My Templates* tab, titled**:**

- 2020 Welcome journey email 1
- 2020 Welcome journey email 2
- 2020 Welcome journey email 3
- 2020 Welcome journey email 4
- 2020 Welcome journey email 5
- 2020 Welcome journey email 6

Note, welcome email 1 is triggered in Exerp when a member signs up.

Once you have selected the template it will load in the edit screen and you will be able to continue through to the rest of the communication steps (Subject line, recipients, send time). Please do not alter content in the welcome emails.

This same process applies to resending other program templates, such as Empower.

Talkbox filters – Creating your target audience

Glossary

Member status:

- ***ACTIVE:*** This is member that has **at least one active subscription** in the system. Please keep in mind this doesn't look at visitation and will count all active members (including dormant). If you want to exclude trials from your communications to active members, you must ensure you add this to the filtering conditions.
- ***INACTIVE:*** This is a member which does not have any active subscriptions (they can have a valid clip card) but used to have an active subscription. This includes all of your ex-members.
- ***TEMPORARY INACTIVE:*** A member will be in this state if either their subscription has been frozen, or their subscription has been blocked.
- ***LEAD:*** This state is used for a person that was of type lead and is yet to purchase a subscription/membership.
- ***CONTACT:*** The person is a contact if they do not have a subscription but should nevertheless not be considered a lead.
- ***PROSPECT:*** This state is used for a person that was of type lead and has had a check-in at a center (appointment or casual visit).
  - Example: If you're a lead who has a casual visit against your profile, but never joined.
- ***TRANSFERRED:*** This state will be used for a member that has been transferred from one club to another club. The state will only be seen for the "old" profile in the member old center.

Notes on Member Status: Status of TRANSFERRED should not be communicated to as they have been transferred to another Fernwood club.

Member type

- ***PRIVATE:*** This is the default person type, the person type of an ordinary member. That is, everyone that is not entitled to be categorized by one of the other person types.
- ***STUDENT:*** Student is a person type for persons that typically are part of an education program and therefore are entitled to a special price.
- ***SENIOR:*** Senior is a person type for persons that are retired and therefore should be given a discount. The person must show valid documentation of being retired (early retirement) the first time she is signing up. Regular documentation cannot be configured for seniors.
- ***STAFF:*** The staff person type is for persons that are employed in your company and should be registered in Exerp as staff. Persons of this type have an additional page with employment details added to their profile.

Notes on Member Type: Only the PRIVATE, SENIOR, STUDENT & STAFF types are currently used in Fernwood. In future we may begin to use more such as CORPORATE, FRIEND and CHILD.

- ***FRIEND:*** The person type friend is for persons that should be registered as friend of an employee.
- ***CORPORATE:*** A person of type corporate is a person that has a relation to a company and a specific company agreement.
- ***ONE-MAN CORPORATE:*** The one-man corporate person type is for persons that by default will get a payment agreement allowing them to receive paper invoices instead of paying by EFT.
- ***FAMILY:*** The person type family is available to people that have the same home address as another active member at the club.
- ***GUEST:*** Persons of type guest are persons created in Exerp with only limited requirements for personal information like first name, last name or phone number. Guests can be converted into an ordinary person as lead by providing the missing personal information.
- ***CHILD:*** The person type Child is related to a person and can be created from the person's relation page. A child has no membership, communication details and account. This person type can be used for e.g. childcare.
- ***EXTERNAL STAFF:*** It can be used to keep track of the external technicians who assist daily and need to access the facility multiple times a day.

VISIT FILTERS

First visit date: First recorded visit in Exerp (attendance). This data will also reflect any members that were migrated over from FCM and will include their visit data if it was recorded in the old system.

Last visit date: Most recent recorded visit in Exerp (attendance)

Expected next visit date: This is a calculated field by Talkbox that calculates a member's possible next attendance date based on previous visits and attendance patterns.

Visit frequency: This is the number of visits over a given date range. high, medium or low based on average interval between visits where top 25% equals high & bottom 25% equals low.

Days since last visit: Number of days since the last recorded visit in Exerp (attendance)

Weekdays visited: Weekdays the member has visited.

Total visits: Total number of observed visits (will be limited to the time frame we have received data for). This is calculated by TalkBox based on the visits on the member's profile. This will include visits recorded in both FCM and Exerp.
Note: the visit data will not re-start if a member cancels and comes back however, it is capped at 365 days so after a year it will no longer show old data

Number of visits last 7 days: Number of visits within the last 7 days

Number of visits last 21 days: Number of visits within the last 21 days

Number of visits YTD: Number of visits year to date

Please note: visit data is capped at 365 days' in the past.

Enquiry date: Lead enquiry date. This will be based on anyone who submits an enquiry through any Fernwood landing page that flows into Exerp. Enquiry date is also back-dated to what was in FCM.

Join date: This is the date the contact (member/lead) profile is first loaded in Exerp. This will only ever be the one date and will not change. Join date is also back-dated to what was in FCM. Example: When the lead is first submitted into the system.

Start Date: This is a member's subscription start date. This is the day their membership officially commences.

End Date: This is a member's subscription end date. Example: A cancellation or an expiry.

Payment Type: This is a member's payment type. There are 2 types:

- RECURRING (direct debit)
- PREPAID (paid in full)

Min term end date: This is a member's contract end date (binding expiry date). Example: Your 12-month contract period has ended.

Deferral from date: This is the date when the member's deferral will start (only applicable to current deferrals)

Deferral to date: This is the date when the member's deferral will end (only applicable to current deferrals).

Rejoin date: This is an ex-member start date. A member will only be a 're-joiner' if they purchase a new subscription at least 30 days after their previous one ended.

Transfer date: The date a member is transferred into your club

Sign-up Date: This is the date the person is pushed into Talkbox.

Sign-up Source: This will be listed as Integration and will not be required when creating your target audiences.

Trial Type: This will be any trial subscription that has been loaded onto a profile in Exerp. The options are the trial subscriptions you have available in Exerp within your club

Trial Start date: The start date of a trial subscription

Trial End Date: The end date of a trial subscription

Subscription Type: The name of a 'base' subscription a member has

Please note: The base subscriptions and trial subscriptions will only ever show the most recent one on a member's profile (based on start and end date)

'Getting to know you' questionnaire targets:

- ***Have you been a member of a fitness club before?***
  - Answers = Yes or No
- ***What are your top 3 health and fitness goals?***
  - Multiple choice answers = Weight Loss, Energy/Lifestyle, Toning/Shaping, Wellness, General Health & Other
- ***What time of day would you be planning on visiting?***
  - Multiple choice answers = Early Morning, Mid-Morning, Lunchtime, Afternoon & Evening
- ***How committed are you right now to change?***
  - Multiple choice answers = Very Committed, A Little Committed & Unsure

Target leads/enquiries

When targeting your leads/enquiries in Talkbox you would need to choose the below member status options:

- Contact
- Prospect
- Lead

For best practice, you should always select 'contact', 'prospect' and 'lead' when targeting enquiries. The prospect is a tour not joined.

Target current active members

When targeting your current members in Talkbox you would need to choose:

Member status is **Active and Temporary inactive (freeze)**

AND

Member status is not Staff

- Include a visit filter i.e. ***days since last visit*** or ***Last visit date*** to remove dormant members.

Pre-set filters available in TalkBox

Your TalkBox account has the following pre-set filters set up. While, these are handy to use, it is best practice to manually apply filters when sending targeted communications.

PLEASE NOTE:

The following pre-set filters were set up in July 2021. In theory, pre-saved filters should update, however, we have noted issues with pre-set filters not reflecting the correct number of contacts. Additionally, some pre-set filters are not date specific and won't be ideal for all communications, especially targeted comms.

Hence, best practice is to apply filters manually, which is a great way for staff to familiarise themselves with the filters when sending targeted communications – don't forget, personalising emails and sending targeted communications results in greater conversion as customers are more likely to identify with the content you're sharing.

60+ Members: All members with an ACTIVE & TEMPOARARY INACTIVE status and is aged 60 and over. It excludes any staff members, anyone without an email address and any trial members.

Ex-Members (All): All persons with a status of INACTIVE. It excludes any staff members, anyone without an email address and any trial inactive members.

Current Active Members (All): All persons with a status of ACTIVE. It excludes any staff members, anyone without an email address and any trial members.

Current Active Members (Excludes 30 Day Non-Attendees): All persons with a status of ACTIVE and TEMPORARY INACTIVE with a last visit date that is less than 30 days. It excludes any staff members, anyone without an email address and any trial members.

Current Active Members (Excludes 60 Day Non-Attendees): All persons with a status of ACTIVE and TEMPORARY INACTIVE with a last visit date that is less than 60. It excludes any staff members, anyone without an email address and any trial members.

Current Active Members (Excludes 90 Day Non-Attendees): All persons with a status of ACTIVE and TEMPORARY INACTIVE with a last visit date that is less than 90 days. It excludes any staff members, anyone without an email address and any trial members.

Current Active Members (Excludes Non-Attendees prior to 1st of Jan 2020): All persons with a status of ACTIVE and TEMPORARY INACTIVE who has visited after the 1st of Jan 2020. It excludes any staff members, anyone without an email address and any trial members.

Contact, Lead & Prospect (All): All persons with a person type of Contact, Lead or Prospect. It excludes anyone without an email address.

Active members (Ended trials): Current members who have had a trial previously.

Active Trials: All persons with an active trial subscription. It will exclude anyone without an email address.

Ended Trial (not joined): All persons who had a trial subscription that has ended and are still inactive (not joined). It excludes anyone without an email address.

MEMBERS

Active and Temporary Inactive Members

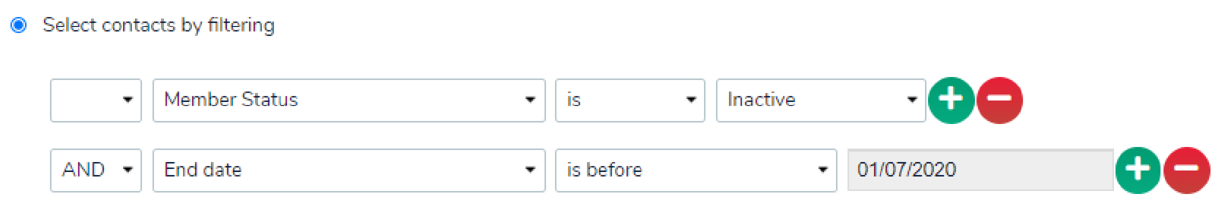
Member Status > is any of > Active, Temporary inactive

AND

Member type > is not any of > Staff

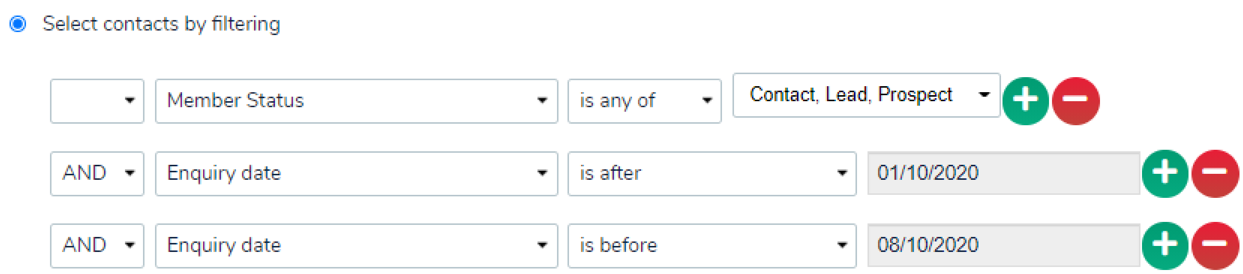
NON-MEMBERS (prospects, trials & leads)

Cancelled members, with an end date before X



Non-members (contacts, leads, prospects), with an enquiry date after 1 January 2020

Non-members, who enquired within a specific timeframe

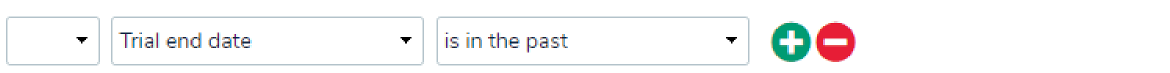


Active Trials

Trial end date > is in the future

Past trials

Please note, if trials are older than March 2020, they will fall into the ex-member category (member status is inactive)



Fernwood staff members