**Fernwood Price Increase Process**

For any clubs that are wanting to implement a price increase to their current members, we have put together the following document to outline the process and next steps required.

**Recommendations on which group of members should receive the price increase**

Before initiating a price increase we recommend that clubs have a strong retention process and have made changes to improve their service or facilities in the last 12 months.

Members who should be targeted are:

Outside of minimum term

Active members with a visit registered in the last 45 days

Members over the age of 18 and under the age of 65

**Finding your list of members that should receive the price increase**

There are a couple of reports that are required to gather your final list. Follow the steps below to prepare your data ready to communicate with members as well as to be able to send to NSO to bulk edit your members with their new price.

Menu > Reports > Easy Extract > Select Subscription & Generic Extract > next >

Filter the report with the following criteria by clicking the plus (+) button next to the relevant criteria:

* Age = Age more or equal to = 18 and Age less than 65
* Global Subscription Type = you need to select all of the subscriptions that you will be increasing the price for by selecting all of the ones that you want in the report. Click on the first one (it will become blue), hold your Ctrl button down on your keyboard and click the next one (both will now be blue). Use the down arrow to scroll down a bit further, continue to highlight all of the ones you want by using the Ctrl button on your keyboard, as well as clicking the down arrow in Exerp to work through the entire list. (Some of the subscription types that you will exclude are: PIF, Trials, Complimentary, Personal Training Sessions, 5 day Passes etc) - ensure none of these are highlighted blue. All the ones you are including must be blue.
* In Binding Period = No
* Subscription State = Active & Frozen (use the control button on your keyboard to select both – both must be highlighted blue)

Click next.

Once all criteria have been selected. Right click and extract the list to excel. Save this report on your computer.

The next report will be used to identify members who have not visited in the last 45 days and remove them from your list.

Menu > Reports > Extract Wizard > Club Reports > next > Active Members Last Visit Date > next > enter the two date ranges, the first date must be 45 days ago and the second date will be todays date > next > extract the report to excel.

Add this report to the first report that you saved on your computer by creating a new worksheet in the saved spreadsheet, then copying and pasting the second report (visit report) across.

Follow these steps to add the last visit date to the subscription report.

* In the subscription report go to column AL and paste this formula in cell AL2 =VLOOKUP(H2,Sheet1!D:E,2,0)
* Once the formula has been pasted, change the format of the cell to a date format. To do this press Ctrl and the number 1 on your keyboard, click on date and click ok.
* Copy the formula or drag it down so that every cell in column AL has this formula.
* Sort column AL so that all of the #N/A ones are together and the ones that show a date are together. (If they have a date then the member visited in the last 45 days. If there is a #N/A the member has not visited in the last 45 days.)
* Delete the rows that have a #N/A and keep all the ones that have a date.

Finally, review column L (subscription price). This is the members current price. Ensure that you are happy for all members in the list to receive the price increase and that they are not already on a higher price. Delete any members that you do not want to receive the increase.

*You do not need to do this step, this is optional if you wanted to review the members names and who will be receiving the price increase.*

* *Go to the visit report*
* *Copy column D (Exernal ID) and insert the copied cells into column A. The end result will be that the external ID is in column A, the First Name is in column B, and the last name is in column C.*
* *Go back to the subscription report and paste the below formula into cell AM2*

*=VLOOKUP(H2,Sheet1!A:C,2,0)&" "& VLOOKUP(H2,Sheet1!A:C,3,0)*

* *Copy or drag the formula down so that every cell in column AM now shows the members name.*

Review the data in your list to make sure that everything looks ok.

Your list is now complete.

**Notifying your members**

As per our Fernwood T&Cs, we are required to give our members **60 days’ notice** of any pricing changes that will affect their membership.

To assist in this process we have put together a template in Talkbox [ 2021 price rise] for you to modify and use when notifying the members about the price increase.

**Price Change Process**

1. Decide on how much the price increase is going to be and which group of members you are wanting to target.
2. Prepare the list of members you are wanting the price increase to effect.
3. Send out your communications to these members notifying them of the change – **this must be 60 days notice.** 
   1. This can be done through Talkbox and you can manually upload this custom list of members using their external ID field.
4. Send over your final list of members who will be receiving the price rise to [helpdesk@fernwoodfitness.com.au](mailto:helpdesk@fernwoodfitness.com.au) and copy in Tahlia Day & Donna Hudec. Please include:
   1. Date the price rise will take effect
   2. Details of the price rise e.g. $1 increase per week for this list of members.

**IMPORTANT NOTE: For members privacy and protection we should avoid sending sensitive information through email. Please remember when emailing your list to remove phone numbers and email addresses from your spreadsheet. The last visit date report does include this information, simply click on the column with the information and delete the data, save the spreadsheet and then email it. Thanks!**