Community Fitness & Wellness Hub CRM Project

Target Users:- Members (The Customers), Studio Staff / Trainers, Management & Studio Owner.

Problem Statement

The client, a local fitness studio with multiple locations, is facing significant operational challenges manual processes. The current system relies on a mix of spreadsheets, calendars, and phone calls to manage key business activities. This Results in:

- **Inefficient Operations:** Class bookings, trainer scheduling, and member communication are handled manually, causing delays and frequent errors. This results in double-booked classes and missed appointments.

- **Poor Member Experience:** Customers are frustrated by the lack of a simple, online booking system and inconsistent communication regarding class details and updates. The absence of a structured loyalty program also fails to encourage repeat visits.

- **Lack of Business Insight:** Management lacks real-time data on class popularity, member attendance, and trainer performance, hindering their ability to make data-driven decisions.

- **No Engagement Strategy:** There is no structured loyalty or rewards program to retain and motivate members.

To address these challenges, the goal is to implement a Salesforce-based platform that will serve as a single source of truth. The solution will centralize all member and class management activities, automating key processes to enhance operational efficiency, improve the overall member experience, and provide clear business insights through powerful dashboards and reports.

Phase 1: Problem Understanding & Industry Analysis

Goal: Understand what we're building and why.

1. Requirement Gathering

Based on initial discussions with key stakeholders, the following functional requirements have been identified for the platform:

- **Member Experience:**
  - The system must allow members to view available classes, filter by date, time, trainer, and class type.
  - Members must be able to securely book and cancel a spot in a class online.
  - The system must automatically send an email confirmation upon booking and a reminder email 24 hours prior to the class.
  - The system must allow members to track their current loyalty points.

- **Operational Efficiency:**
  - Studio staff and trainers must be able to create, edit, and manage Class and Trainer records.
  - Staff must have a centralized view of all class bookings and member attendance for a given day.
  - The system must track member loyalty points based on class attendance.

- **Management & Reporting:**
  - Management must be able to view dashboards showing key performance indicators (KPIs) such as class attendance rates and total active members.
  - The system must generate reports on class popularity, top-performing trainers, and member loyalty.

2. Stakeholder Analysis

Three primary stakeholder groups have been identified, each with unique roles and needs that the solution must address:

- **Members (End-Users):**
  - Role: The customers of the fitness studio.
  - Needs: A seamless, user-friendly experience for booking classes and a transparent view of their engagement and loyalty.

- **Studio Staff/Trainers (Internal Users):**
  - Role: The administrators who will use the system daily to manage operations.
  - Needs: A simple, efficient interface to manage schedules, track attendance, and resolve member issues.
- **Admins:**
  - Configure the Salesforce platform, manage permissions, and ensure smooth operations.
- **Management/Studio Owner (Business Sponsors):**
  - Role: The decision-makers who need to analyze business performance and ROI.
  - Needs: Clear, real-time insights into operational metrics to drive strategic planning and growth.

3. Business Process Mapping

A critical step is mapping the current manual processes ("As-Is") and defining the future, automated processes ("To-Be").

- **As-Is Process (Manual):**
  - A member calls the studio to book a class. A staff member manually enters the booking into a spreadsheet. No automated confirmation is sent, and class reminders are often forgotten.
  - Payments and attendance are tracked manually, often leading to errors.
- **To-Be Process (Automated):**
  - A member books a class via an online form (Salesforce Flow). A Class Booking record is automatically created in Salesforce. The system sends an instant email confirmation and a scheduled reminder email the day before the class. The class roster is automatically updated in real-time.
  - Payments and loyalty points are automatically tracked.
  - Managers see real-time data via dashboards.

4. Industry-specific Use Case Analysis

The fitness and wellness industry presents unique requirements that a standard CRM must be adapted to handle. Our solution will specifically address:

- Class Capacity Management: The system must prevent overbooking by ensuring that the number of Class Booking records does not exceed the Class capacity.

- Member Loyalty & Retention: The system must include a mechanism to track and update Loyalty Points for members who attend classes, which is crucial for fostering long-term engagement.

- B2C-First Approach: The primary user interface for bookings will be a public-facing portal or form, designed specifically for the customer's convenience, prioritizing an intuitive user experience.

5. AppExchange Exploration

Existing solutions on Salesforce AppExchange (such as scheduling tools and loyalty apps) provide useful reference points. However, this project focuses on building a custom native solution to demonstrate Salesforce platform capabilities including custom objects, flows, automation, and dashboards.