

# **FitCRM: A Salesforce-based Fitness & Gym Customer Relationship Management System**

## **PHASE 1**

### Problem Understanding & Industry Analysis

#### 1. Requirement Gathering

- 👉 Goal: Understand what each stakeholder needs from the system.
- Gym Members: Simple membership renewal, attendance tracking, rewards visibility.
  - Trainers: Easy access to assigned members, track attendance & performance.
  - Gym Admins/Owners: Manage leads, memberships, revenue, and trainer performance in one place.
  - Reception Staff: Quick check-in process for members, referral tracking, and renewal reminders.
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#### 2. Stakeholder Analysis

- 👉 Goal: Identify roles and responsibilities in the gym ecosystem.

##### Primary Stakeholders:

- Gym Members → Use system for attendance, renewals, rewards.
- Trainers → Track assigned members and manage performance.
- Gym Admins → Oversee memberships, trainers, referrals, and revenue.

##### Secondary Stakeholders:

- Salesforce Admins → Configure, automate, and maintain the system.
- Marketing Team → Use referral data for campaigns.

- Vendors/Partners → Potential integration with payment gateways or IoT devices.
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### 3. Business Process Mapping

👉 Goal: Understand how things are done today vs. how Salesforce can improve it.

Current Process (Manual/Traditional):

- Leads tracked manually via paper/Excel.
- Renewal reminders done verbally or not at all → leads to membership dropouts.
- Attendance tracked on registers → errors and inefficiency.
- No structured referral program.

Proposed Process (Salesforce Enabled):

- Leads captured automatically in Salesforce → converted to Members.
  - Automated email/SMS renewal reminders → improved retention.
  - Attendance logged digitally via custom object → real-time tracking.
  - Referral system → auto-rewards members when new joiners are referred.
  - Dashboards → real-time insights on revenue, performance, and referrals.
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### 4. Industry-Specific Use Case Analysis

👉 Goal: Benchmark against best practices in fitness industry CRM.

- Member Retention:
  - Problem: Gyms lose members due to poor follow-ups.

- Solution → Automated Salesforce reminders & dashboards.
  - Trainer Performance:
    - Problem: Hard to measure trainer impact manually.
    - Solution → Attendance & member performance reports.
  - Referral Programs:
    - Problem: Word-of-mouth exists but is untracked.
    - Solution → Loyalty rewards for referrals in Salesforce.
  - Revenue Tracking:
    - Problem: No consolidated view of gym revenue.
    - Solution → Salesforce dashboards for monthly revenue.
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## 5. AppExchange Exploration

👉 Goal: Identify existing Salesforce apps to reduce development effort.

Potential Apps:

- SMS/Email notification apps → for automated reminders.
- Loyalty/Rewards management apps.
- Payment gateway connectors (Stripe, Razorpay).
- Attendance tracking integrations (future IoT apps).