1. Sales Interface Requirements

Lead Management:

- Track all incoming leads and inquiries.
- Set priority levels (e.g., “High Priority,” “Follow-up Required”) for each lead.
- Capture key lead details: source of inquiry, interest level, preferred program, and call notes.

Sales Call & Follow-Up Tracker:

- Schedule and manage calls with automated reminders.
- Track call status (e.g., “Pending,” “Called,” “Closed”) to manage follow-up actions.

Conversion Tracking:

- Mark leads as “Converted” once they enroll, transitioning them into client status.
- Automatically initiate the client onboarding process upon conversion.

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2. Client Onboarding and Data Management

Client Intake Process:

- Clients directly fill out details like personal information, health goals, and preferences through the app during sign-up.

Client Profile and Data Management:

- Centralized profiles displaying program details, scheduled sessions, assigned staff, and subscription details.
- Track client progress: session attendance, feedback, workout history, and health metrics.
- Access to chat and video consultation features with trainers and dietitians.

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3. Manager Interface Requirements

Staff Assignment and Management:

- View all trainers and dietitians with their client load and availability.
- Assign clients to trainers and dietitians based on availability and program needs.

Scheduling and Availability Dashboard:

- Calendar view showing all sessions, availability, and group schedules.
- Filter schedules by trainer or dietitian for streamlined assignments.

Client-Staff Matching & Reassignment:

- Reassign clients based on real-time availability and capacity.
- Automated notifications for staff capacity updates or new client assignment needs.

Performance & Program Insights:

- View performance data for trainers and dietitians, including client retention and feedback.
- Analyze program success rates and identify high-performing areas.

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4. Customer Success Interface Requirements

Follow-Ups and Support:

- Bi-weekly automated scheduling for follow-up consultations.
- Capture and log feedback to track client satisfaction and resolve issues proactively.

Client Satisfaction Dashboard:

- Monitor engagement levels and satisfaction rates.
- Alerts for clients needing extra support or showing recurring issues.

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5. Trainer Interface Requirements

Client Data Access:

- View assigned client profiles with goals, health data, progress, and attendance history.

Session Management:

- Schedule and manage group and 1-on-1 sessions through the app.
- Plan and customize workouts, including exercise types, reps, and sets for each session.

Attendance and Progress Tracking:

- Mark attendance for sessions and track client engagement.
- Log workout completion and provide progress updates.

Consultation and Recorded Sessions:

- Schedule monthly consultations for 1-on-1 clients.
- Provide access to recorded sessions for clients to train on their own schedule.

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6. Dietitian Interface Requirements

Client Overview and Progress Tracking:

- Manage assigned clients, including tracking statuses (active, paused, stopped).
- Log weekly weight and progress updates, with visual progress charts.

Renewal and Testimonial Tracking:

- Reminders for renewals and testimonials from clients nearing program completion.

Nutritional Guidance and Planning:

- Provide daily food and lifestyle monitoring through chat and video consultations.
- Offer personalized nutritional advice and log improvements in health metrics.

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7. Subscription and Access

Subscription Management:

- Allow clients to subscribe to custom program plans directly through the app.
- Payment gateway integration for seamless renewals and plan upgrades.

Access to All Services:

- Book fitness sessions (live or recorded), consultations, or group activities directly within the app.
- Chat with trainers and dietitians for guidance and real-time feedback.

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8. Additional Features for All Roles

Progress Visualization:

- Weekly health data (weight, measurements, etc.) displayed in charts for easy tracking.
- Accessible by both clients and assigned trainers/dietitians.

Comprehensive Reporting:

- Generate detailed reports summarizing attendance, progress, and overall program outcomes.

Notifications and Alerts:

- Automated reminders for sessions, renewals, follow-ups, and assigned tasks for trainers, dietitians, and clients.