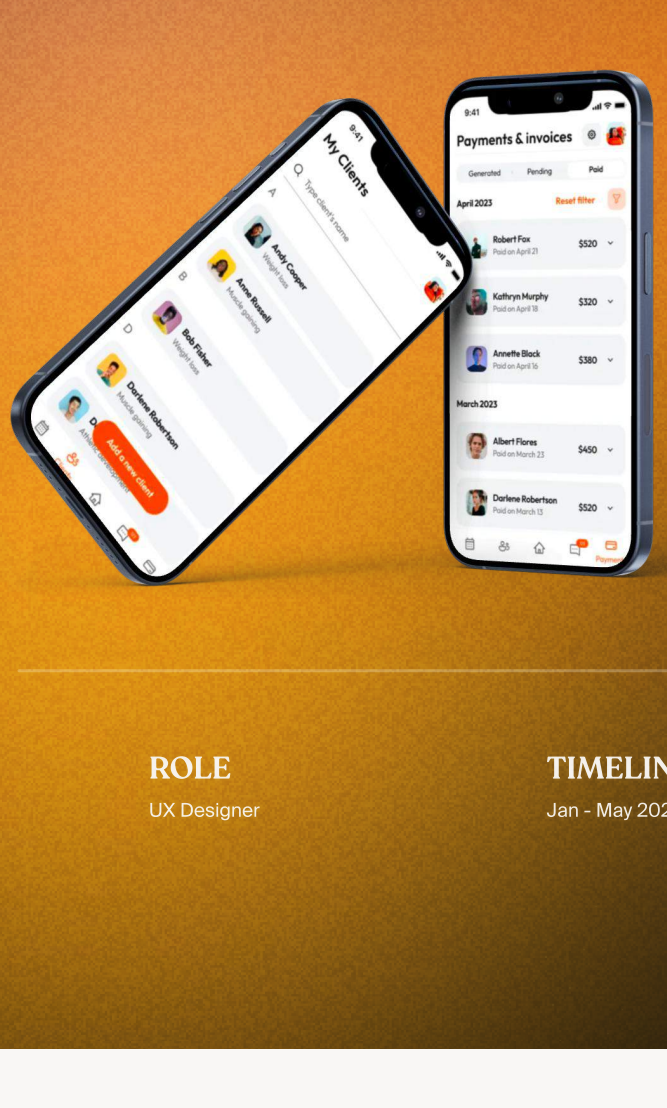


Building strong client relationships

💡 UX Design

Helping fitness businesses streamline client profile management and increase member retention with omni-channel management and new internal metrics board.

ROLE
UX Designer

TIMELINE
Jan - May 2024

TOOLS & SKILLS
Figma
App Design, Prototyping, User Research, Product Strategy

SKIP TO FINAL ↓

Project Overview

Discovering the space 🔎

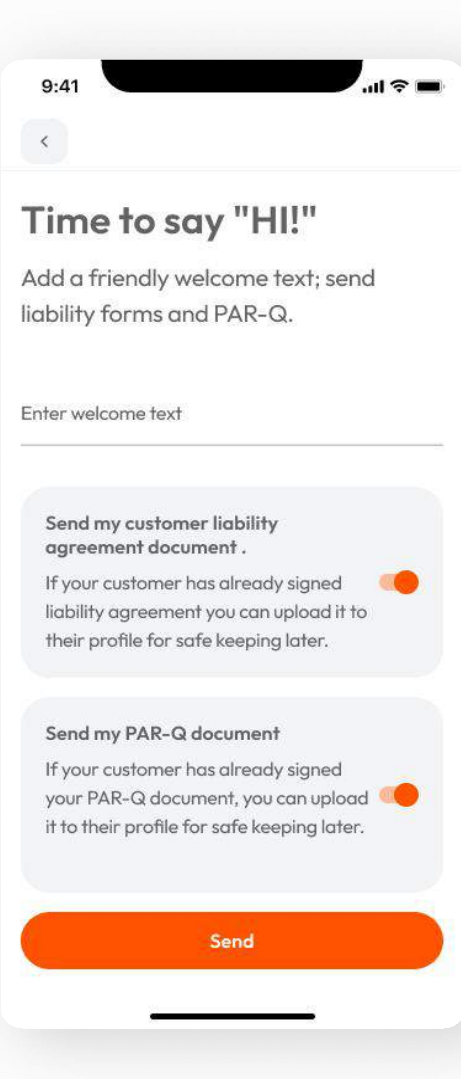
Client management processes shouldn't be *messy*, and yet most often they are. When the process gets messed up, it brings the user's whole system down with it and **negatively impact the ROI**. Now, enter *Flento*. Flento works as a one-stop shop which centralizes fitness businesses client and member experiences; coming in to help users automate the process of **client relationship management** (CRM). As one of the 3 UX designers on the team, I focused on improving the *information architecture* & *user flows* on their CRM and **scheduling SaaS** (software as a service) **software experiences** for ftiness professionals and their enterprise clients-- this was my process.

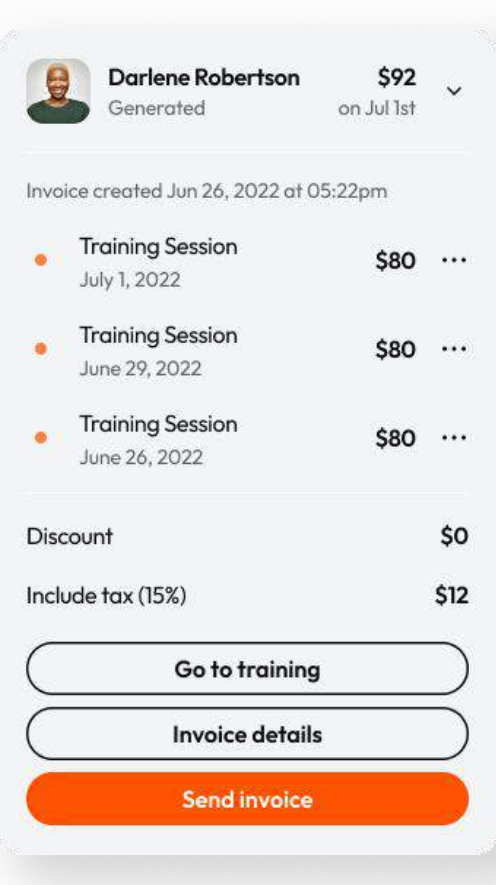
Please reach out for more details on the project! My research and processes guide my designs, and we can chat more about my experience so you can learn more about the whole scope of my work <3

Psst... here's a sneak peek of the final designs!

Core experiences

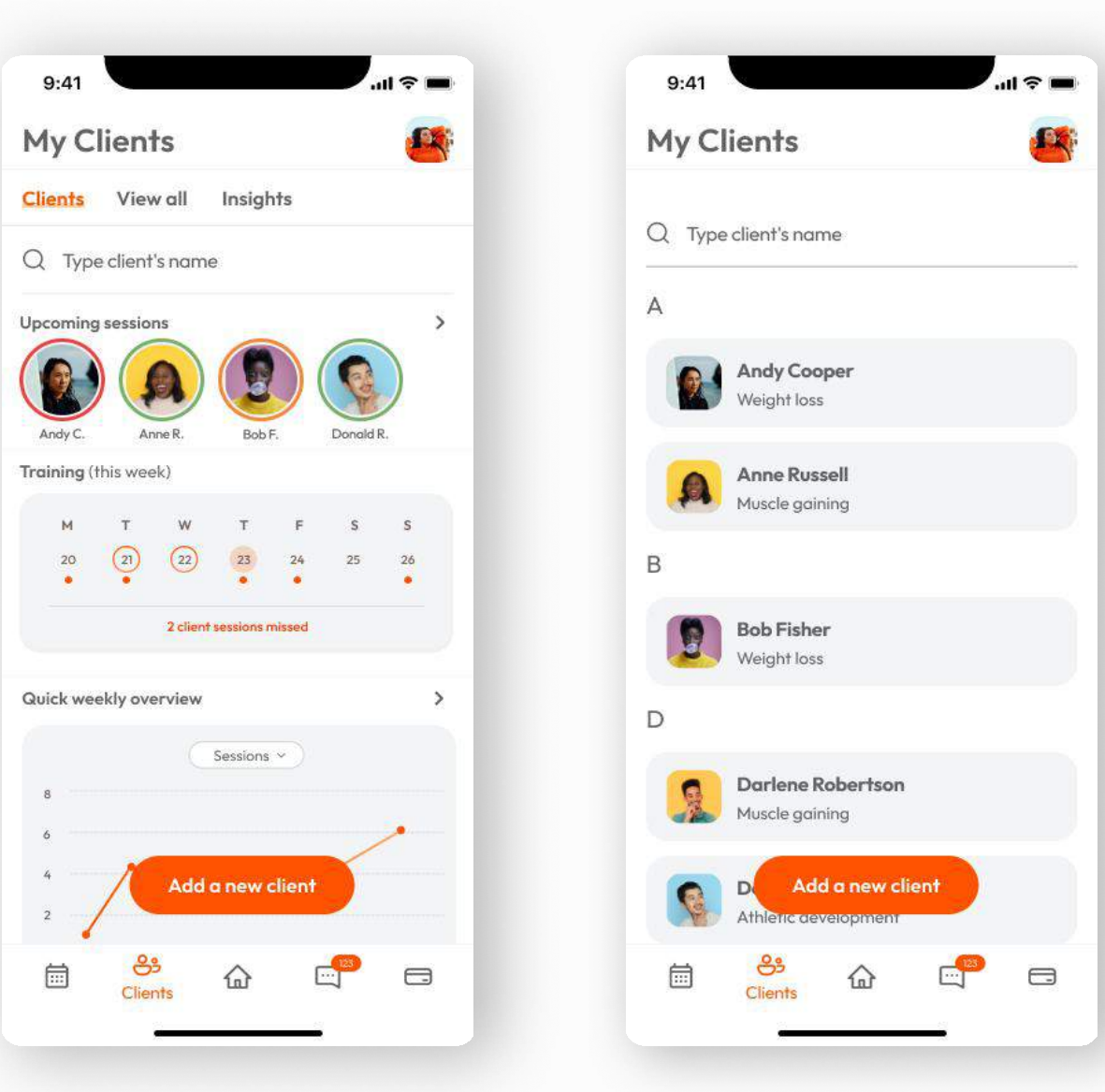
Internal metrics dashboard and omni-channel client overview are client profile management tools that assist fitness trainers with evaluating the efficiency and effectiveness of their customer relationship management (CRM) activities. From scheduling clients to managing their profiles, CRM metrics can help businesses quantify measures to understand their clients better and customer satisfaction.


9:41
Time to say "HI!"
Add a friendly welcome text; send liability forms and PAR-Q.
Enter welcome text
Send my customer liability agreement document.
If your customer has already signed liability agreement you can upload it to their profile for safe keeping later.
Send my PAR-Q document
If your customer has already signed your PAR-Q document, you can upload it to their profile for safe keeping later.
Send



Track client activity

Keep on top of client training sessions, progress, and communications in the CRM dashboard. Internal metrics dashboard and omni-channel client overview are client profile management tools that assist fitness trainers with evaluating the efficiency and effectiveness of their customer relationship management (CRM) activities. From scheduling clients to managing their profiles, CRM metrics can help businesses quantify measures to understand their clients better and customer satisfaction.



Wait, how'd we get there? Let's go back to the process work!

Evaluating Flento

Flento versus direct & indirect competitors (found by searching Flento keywords in different search engines)

Voiceflip's SaaS platform, **Flento**, targets fitness businesses, including gyms, personal trainers, and fitness studios, providing them with a variety of tools to **ease** the process of business admin work. As the fitness app market continues to grow, there's an *increasing* demand for apps that cater to the needs of both individual users and fitness businesses; with the market of fitness business management platforms being less saturated.

Among the likes of independent fitness apps like *Nike Training Club*, *Nike Run Club* (NTC), *Trainerize*, *FitOn*, and more recently AI-powered platforms like *Zing AI* in the current market-- Flento exists to help fitness businesses to run successfully through **bookings** and **calendar management** features, in-app **communication** with clients, client **file management** and **document intake**, and **automated invoicing** + **payment processing** features. It stands out as an all-in-one solution for fitness businesses by providing them with tools catering to a variety of trainers business needs.

Competitive Analysis	Flento	Trainerize	Everfit	Nike TC
Client Management	✓	✓	✓	✗
Client Activity Monitoring	✓	✓	✓	✗
Training Scheduling	✓	✓	✗	✗
Integrated Payment	✓	✓	✗	✗
Fitness Libraries	✗	✓	✓	✓
Document Management	✓	✓	✓	✗
Achievements (Client Personal Bests	✗	✗	✓	✓
In-App Messaging	✓	✓	✓	✗

Market Research

In both the fitness and client relationship management space, it's **hard to retain members** in the long-term.

Nowadays, plenty of fitness apps are available to assist those eager to improve their fitness levels. According to a recent report by Statista, the revenue generated in the Fitness segment has reached an impressive $4,024.9 million in 2021, and it continues to multiply. The Global Fitness Gym Management Software Market, characterized by a rapid and substantial growth in recent years, is also anticipated to experience continued significant expansion from 2023 to 2031, according to the Market Research Intellect. In both fitness building apps and fitness business/client relationship management, **retaining members** in the long term can be *challenging*. Many fitness businesses struggle to maintain client engagement and ultimately **lose clients** due to *ineffective communication*, *lack of personalized support*, and *difficulty managing business operations* ***efficiently***.

Trainers' interactions with clients are heavily influenced by factors such as empathy, motivation, and the desire to help clients achieve their fitness goals. Additionally, factors like self-efficacy and confidence in their ability to effectively manage clients can impact their behavior within the app. Research by fitness industry experts like ***American Council on Exercise*** (ACE) highlights the importance of **trust** in *client-trainer relationships* and its **impact on client retention** and **adherence to fitness programs**. Every client is unique, with different *fitness levels*, *preferences*, and *challenges*. Trainers understand the importance of **client management** in *tailoring* fitness programs to meet each individual's **specific *needs* and *goals***.

Diving into the UXR...

Three main discovery pillars for our approach

Prioritization
What are the key features or functionalities that trainers prioritize the most to ensure high customer satisfaction rates and effectively manage their administrative tasks?

Business strategies
How do trainers establish effective business strategies from data insights provided on their clients to improve client retention? What key features support business growth, operational efficiency, and decrease churn rates?

Habits
Understanding trainers' habits and interactions with CRM system to understand their daily workflows to optimize usability & efficiency

Streamlining workflows & client connections

In both fitness building apps and fitness business/client relationship management, retaining members in the long term can be challenging. Many fitness businesses struggle to maintain client engagement and ultimately lose clients due to ineffective communication, lack of personalized support, and difficulty managing business operations efficiently. While there are some apps available in the market that exist to solve these business problems, Trainerize and Everfit are one of the most successful apps out there. They also closely match Flento's product offerings and stand out in terms of their features and value proposition. In examining their capabilities, strengths, and weaknesses, I aim to gain insights into how Flento can enhance client engagement, retention, and business efficiency from a coach/trainer and client perspective.

Many fitness members **breakup** with their local gym or trainer (typically around the five-month relationship mark), for a variety of different users. Managing business communications effectively and supporting clients can quickly become overwhelming without a great, centralized system and may lead to a loss of clients and customer dissatisfcation. According to the *International Health, Racquet & Sportsclub Association* (IHRSA), recruiting a new member is **five times more expensive** than retaining an existing one, so it was important to look at the bigger picture of how Flento can **reduce churn rates** from both a client-to-trainer (or **DTC**) and **B2B** perspective. Just like in any business relationship, client retention is hard work that requires trainers to put in continuous effort to build rapport and better connect to clients.

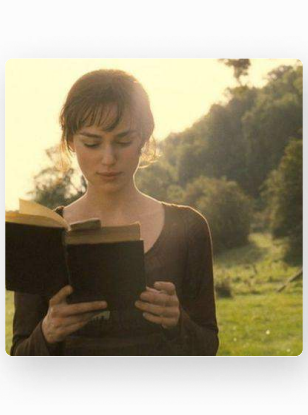
To guide research on how we could build a stronger CRM system on Flento, we identified 5 main components of an ideal human relationship:

Shared feeling of being understood, accepted, valued

Mutual trust & respect

Connection & belonging

Good communication & problem solving


Stability & shared values

Using information about our current and target users, I created a user persona to guide research and design explorations:

The Beginner Trainer

USER PERSONA

About	• Trainers are primarily (adding up to 90 percent of users) **middle-aged** and **entrepreneurial**, **retired**, and **traditional**. 10% of our Blob Friends are in the **Gen-Z** to **millenial** age group, and are characterized as *tech-savvy* • Trainers find it difficult to efficiently manage their fitness admin tasks at a cost-effective rate, while also *strategizing* to **retain** their fitness clients
Motivations & Goals	• Flento's users desire ways to to streamline business operations to focus more on training clients and maintaining **strong client relationships** • They desire a platform that can handle all aspects of client management in one place to save time and effort, such as offers automated invoicing, payment processing, and communication features
Common problems	• Challenging to **manage clients' appointments**, **payments**, and **communication** effectively while also focusing on providing **quality training** sessions • Coordinating with clients and keeping track of their progress is difficult without a *centralized system* • Struggles with **manual invoicing** and **payment processing**, which is energy and time consuming

To guide designs, we asked:

How might we improve the user experience to better support trainers in *effectively* **managing** their administrative tasks?

How might we *enhance* and *optimize* CRM features to foster ***stronger*** **client engagement** and ***boost*** **B2B and DTC client efficiency**?

Key insights extracted from findings 🔎

Lack of quantifiable client details for developing business strategies

From communicating on Instagram, Email, WhatsApp, messages, and more; information can easily get **lost** and messages go **unread**. Flento's in-app communication on top of its business and client management features solve these problems, but is it ***effective?***

Flento's current layout for their client profile management is very **basic**-- designed with two simple card components allowing you to add new clients, view and update existing clients information in a contacts list style, and redirect to schedule a training session with specific client(s). Below are some of the granular strategies that they struggle with in specific:

Organization & efficiency
Trainers indicate that they strongly seek out efficient processes and organizational methods for client profile management, quantifiable service quality and customer satisfaction, and accessing client information, communications, and documents. Lack of centralized systems and efficient management strategies took time and made it difficult to keep clients engaged.

Increase client retention & engagement
Clients may feel hesitant when it comes to training, especially if in a remote environment as they believe they won't get the same results without a coach being there. Trainers need a way to make online coaching approachable, reliable, and enjoyable in a time-effective manner.

What does this boil down to?

We found that a client metrics dashboard should be our primary focus, as there are little to no specific features that provide business with quantifiable data and insights to create business strategies that help with customer retention in terms of the CRM system. Building upon the current system will not only allow trainers to contact, add and update their client details, progress updates, and schedule training sessions all in one place, but also allows them to gain access to reliable training metrics that highlights important data and metrics.

Empthatizing with our users

Why don't churned members want to stay?

To understand the needs of *all* types of customers of Flento's beloved trainers, we identified key focus areas on why members might not want to commit:

01
😔 No signs of improvement from services
From research findings, these members tend to leave because they don't see the results they expect and/or see no results.

02
😴 Training sessions are not engaging
If members start to lose excitement from their training sessions, they may get bored and decided to cancel/switch to seek more engaging experiences in their fitness.

03
😩 Disorganized spaces
From poor booking systems and communication, to messy fitness facilities, clients may feel frustrated and dissatisfied. Organised spaces, both in-person and digital, is important to keep both clients and trainers happy.

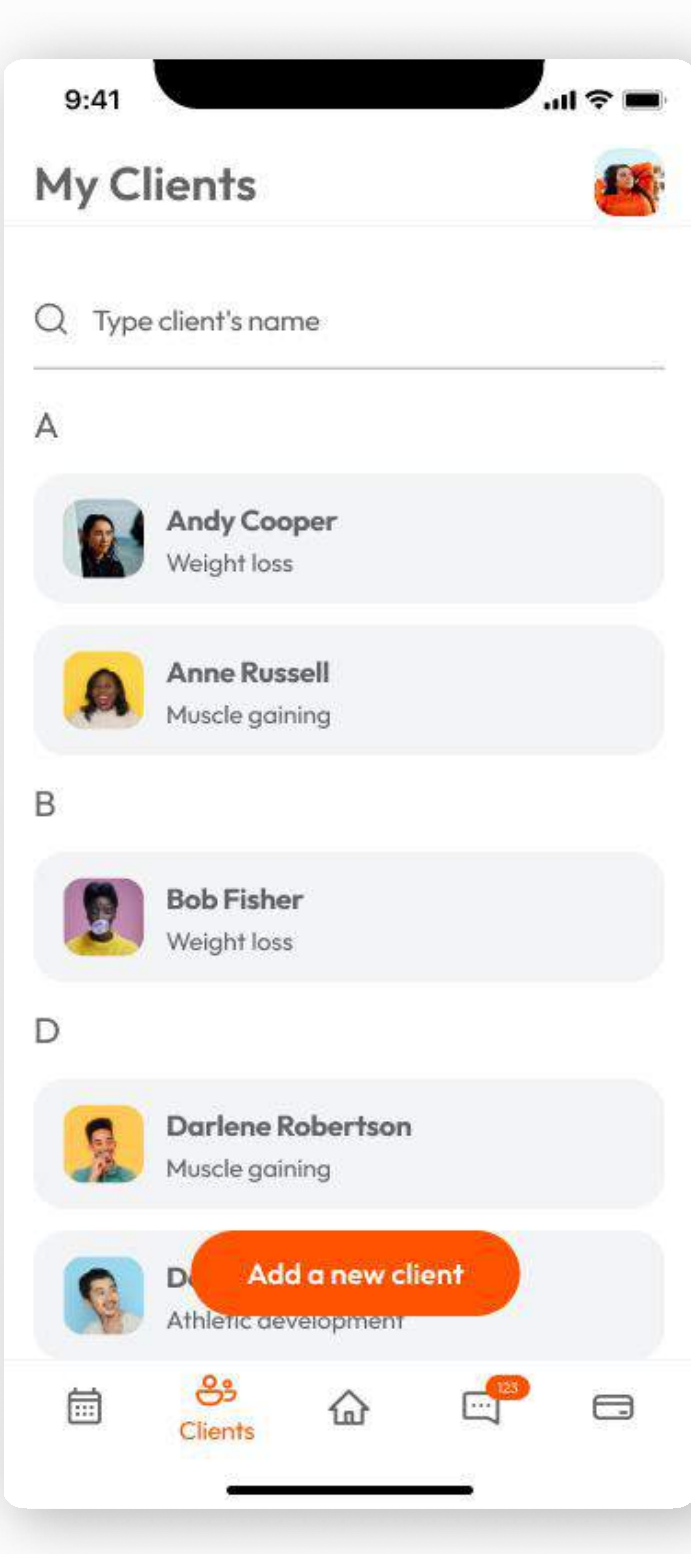
The design goal 💭

To bridge connection between ***trainers*** and their ***clients*** to increase **retention** and **business growth**. To where managing clients is **so *efficient*** it feels ***fluid*** **even when trainers are piled up with admin work.**

Let's compare and contrast...

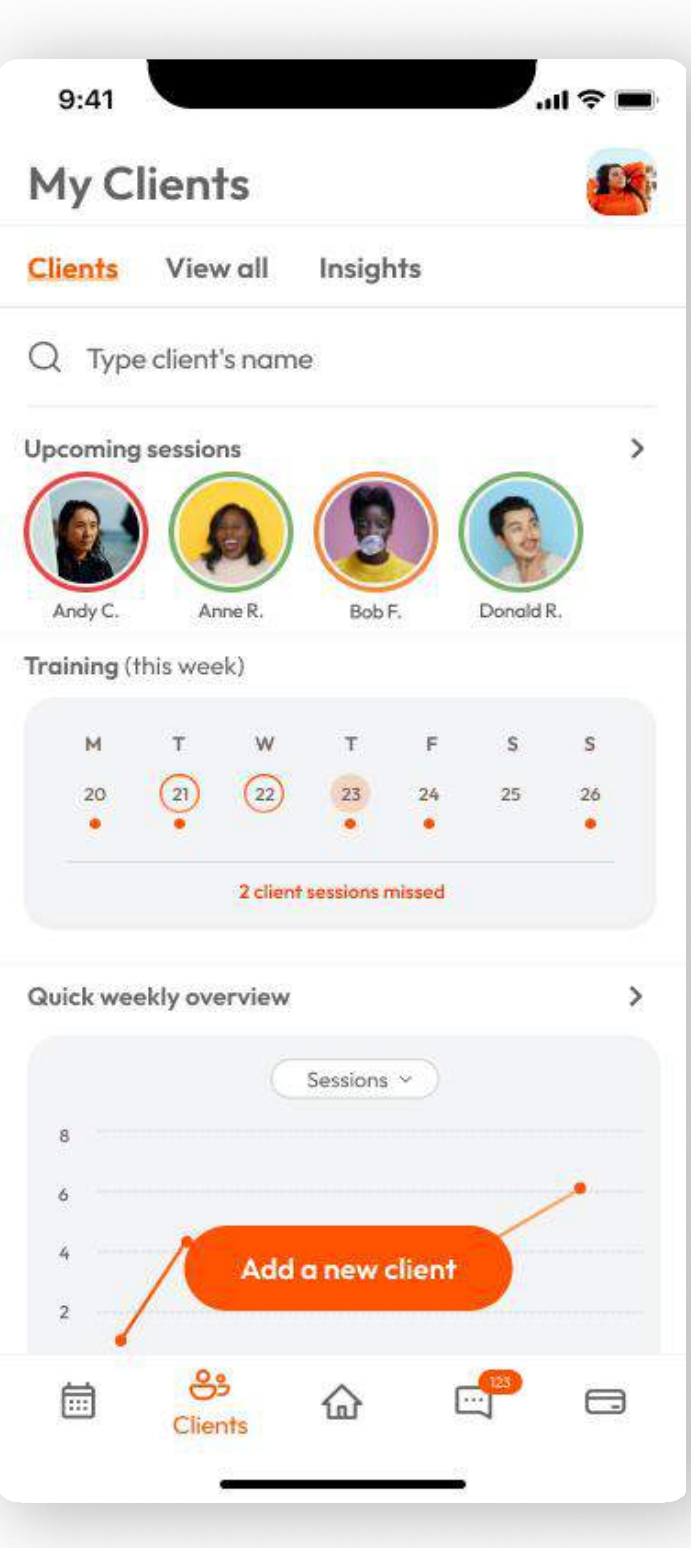
Before

Currently, there only exists a **list-view** of the trainers clients when on the clients page.



After

With the updated centralised CRM system, trainers can view upcoming training sessions for the week, training and progress insights, and switch between categories via omni-channel view.



Looking for more? 🤔

In order to comply with my NDA, much of my process and work has been omitted. This involves more of my in-depth research, ideation, thought process, and creative collaboration. Please reach out on **Linkedin** to hear more!

MY LINKEDIN!

Thanks for stopping by!