



*How do you visualise your
business?*

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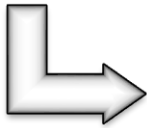
A big thank you to today's sponsors

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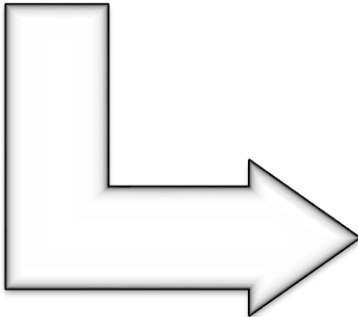


Agenda

Think



Plan



Do

Think

- **9.45am** It's a complicated business – the difficulties we all face
- **10.10am** Leisure management system data – responsibilities and actions
- **10.45** Handling other data and paperwork – accessibility and usability
- **11.15am** Capturing customer feedback - using it to enhance your business (by Proinsight)

Plan

- **11.45pm** Information used by staff – ensuring it is effective
- **12.15pm** MoveGB Intro
- **12.30pm** Lunch
- **1pm** Why dashboards are the way forward
- **1.20** Identifying the critical data that makes a difference for each department

Do

- **1.45pm** Recognising issues and how to correct them
- **2.10pm** Train your teams to develop your product
- **2.30pm** Ukactive update
- **2.45pm** Finish

It's a complicated business



It's a complicated business

- *Departments and Job roles*
 - *Fitness*
 - *Gym team members, gym manager, cleaners, course co-ordinator, aerobics co-ordinator, Retention & Customer service, fitness manager*
 - *Front of house*
 - *Receptionist, reception manager*
 - *Admin*
 - *Bacs collection, memberships, complaints, stock, cash reconciliation*
 - *Marketing*
 - *Memberships promotion, POS offers, feedback on campaigns, standards*
 - *Operations*
 - *Customer service, H&S, HR, Daily Business prep*
 - *Management*
 - *Fitness, reception, sales / memberships, operations, commercial, data*
 - *Sports development*

How do you see it?



Mind map of business

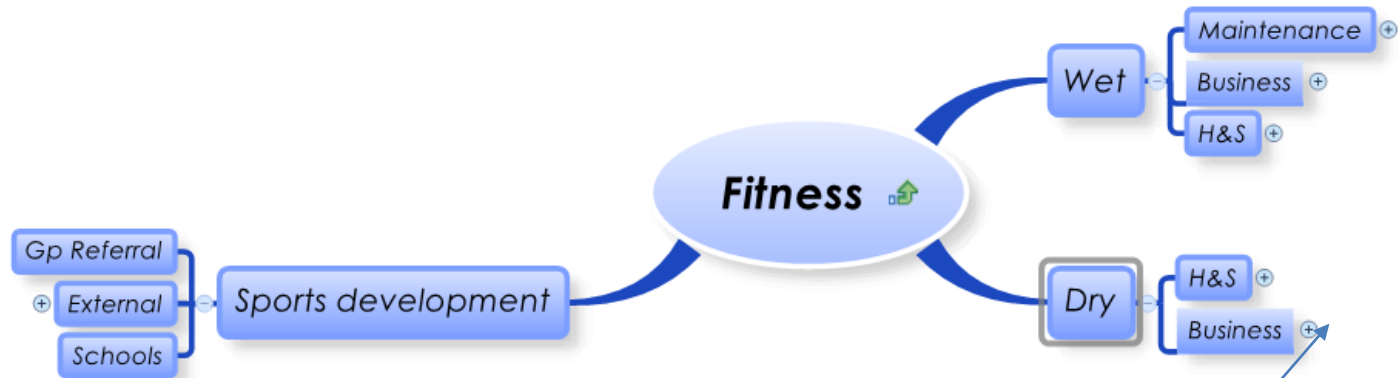
- [S:\Internal\Sales\Mind maps\NewSingle view of business.xmind](#)

Departments

Click to
move on

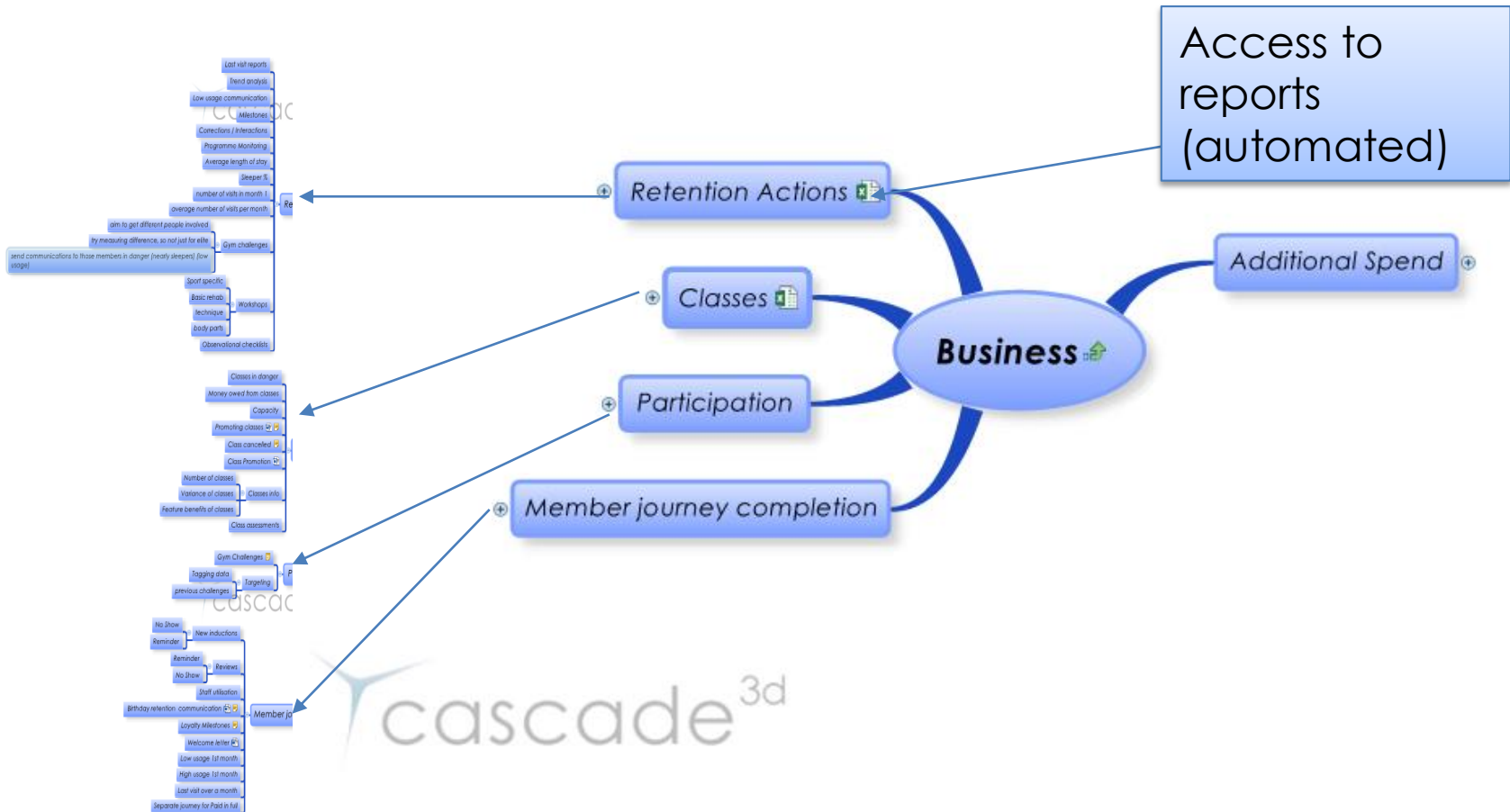


Business unit overview



Click to
move on

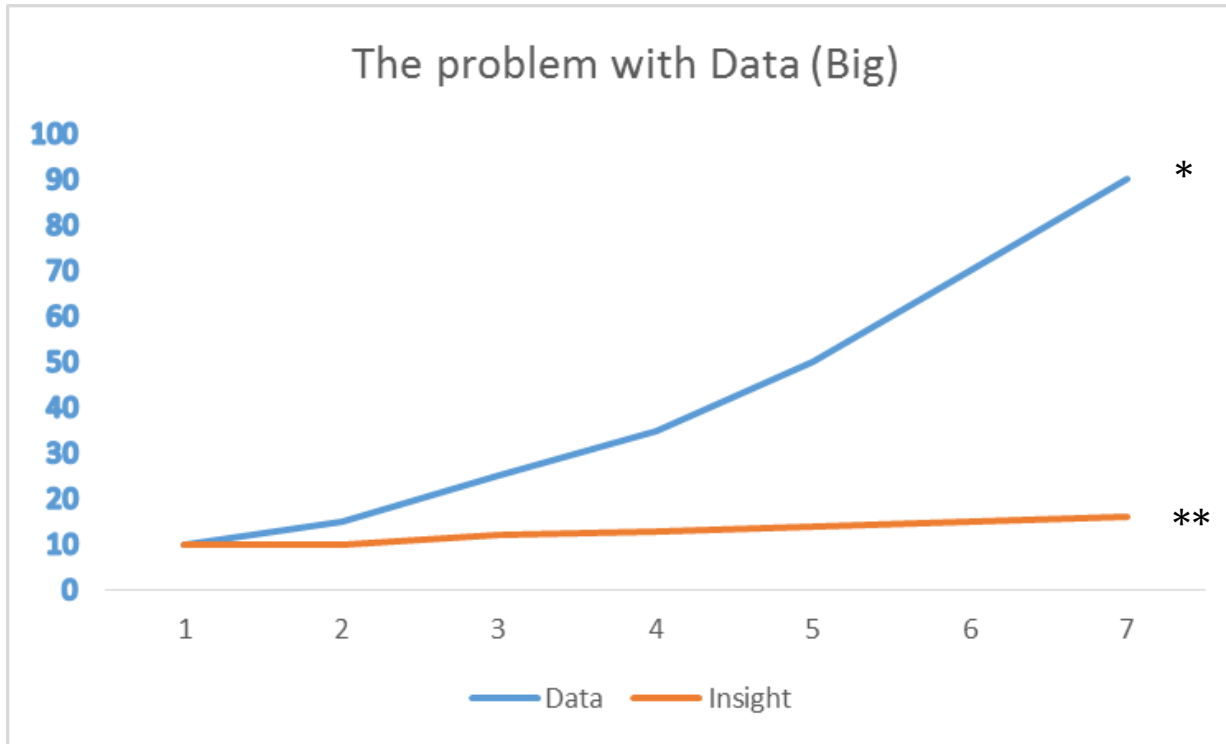
Business unit Detail



Mind map to show business

- *Where do you want to look?*

The problems with big data



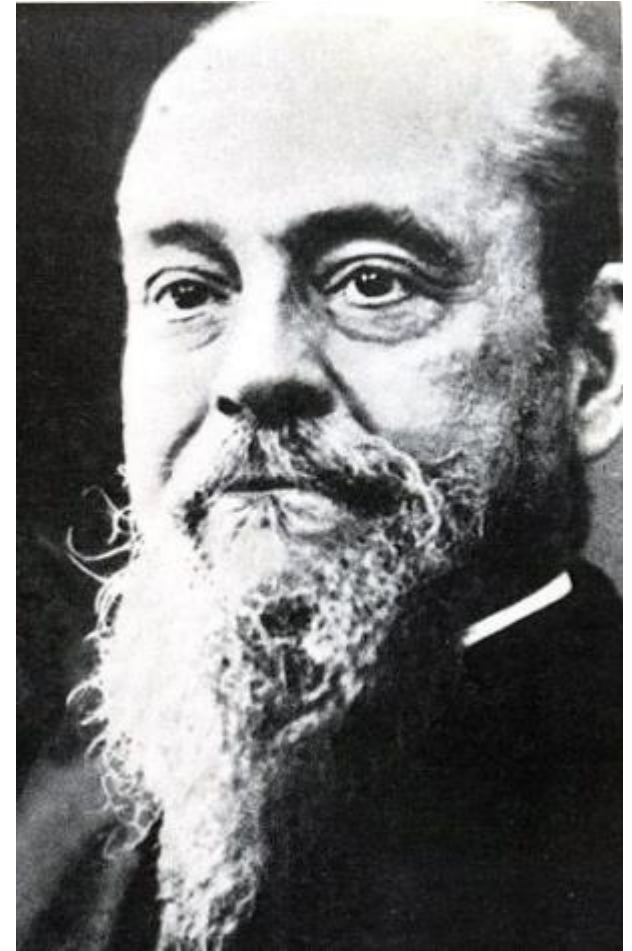
* The only mention of big data I promise

** I made this up – but trust me I am a professional

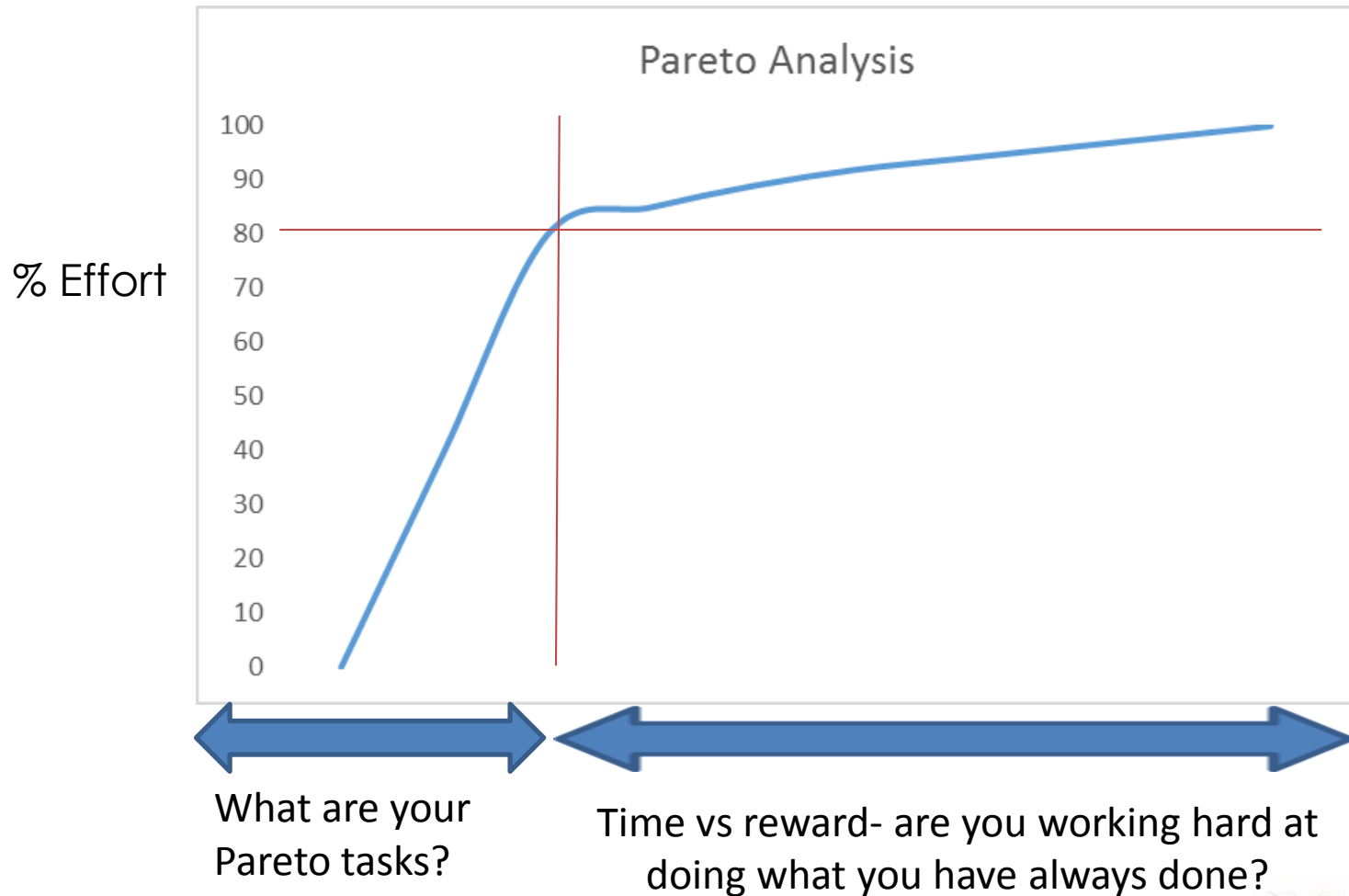
Data sources – Leisure Management System

- *What do your reports look like?*
- *What is your data management like?*
- *Who is responsible for which tasks & what data do they need to do it?*

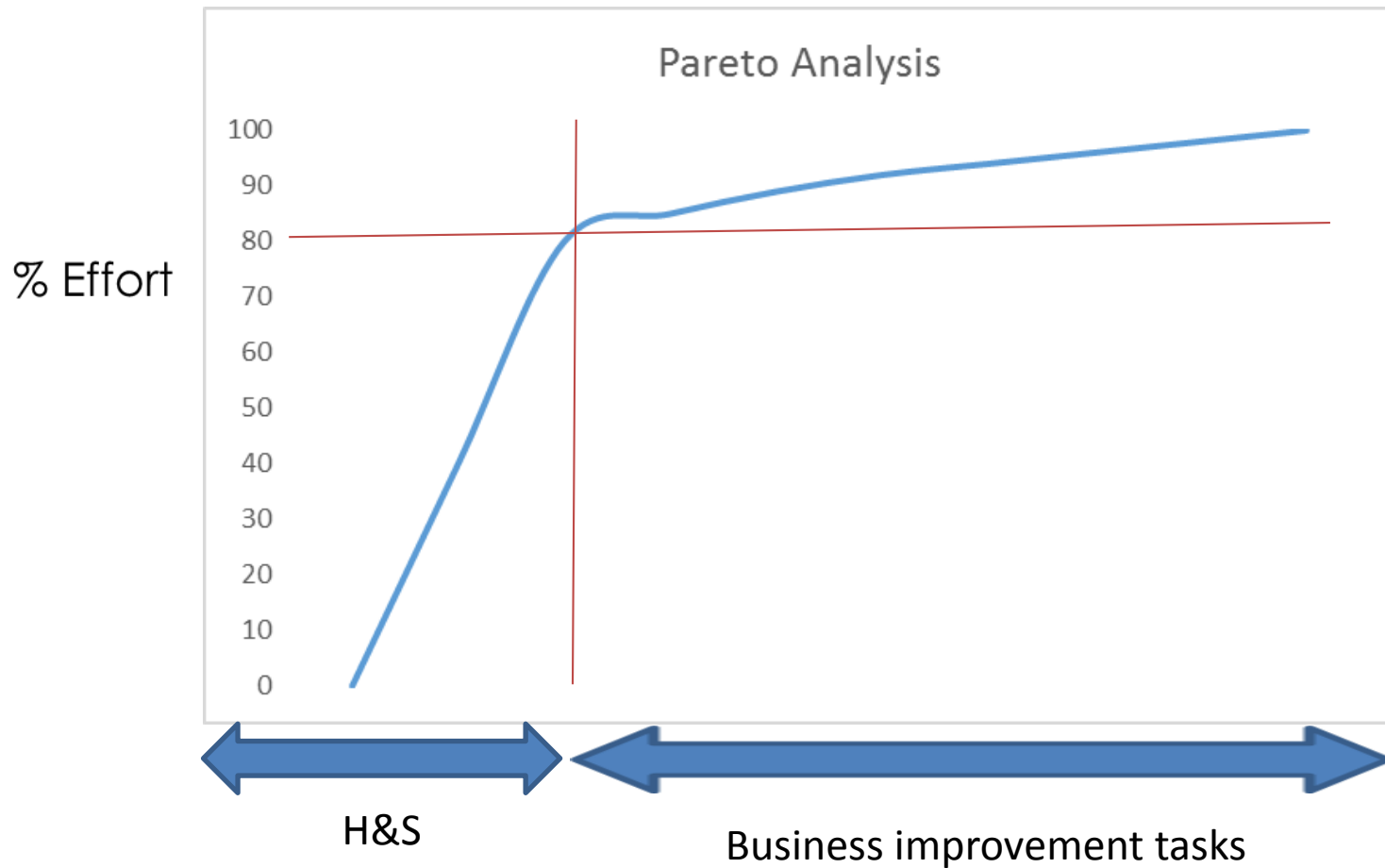
Vilfredo Pareto



Pareto Analysis



Leisure Pareto Analysis



Top 5 wins from Pareto in Leisure

- *Retention- Sleeper rates, length of stay and attrition*
- *Prospecting- Ex members, casual upgrades*
- *Utilisation of space- who has filled that space before, are you looking forward?*
- *Chasing money that is yours- Bacs rejects, bookings, classes and refunds*
- *Spend per swipe- ad spend strategy*

Benefits of solutions

- *Pareto analysis of your data (are you concentrating on what gives you the biggest return or what you have always done)*
- *Big data in small chunks*
- *Accountability for all data*
- *Help to schedule work in*
- *Easy to help / check (as you know what has been completed)*
- *If staff off you know what actions are needed and what data you need to do it*
- *Location of data makes it more accessible to all*
- *Decisions made from interpreting data not hunches*
- *Action led data plan*
- *When- Automation*
- *Results - dashboard*

Where to find the data

Who's Responsible



Bringing data to life

Solutions reports templates

Section of tree	Source report name	Spreadsheet tab	Who	Frequency	Department	Definition	Action
Members	Live members	Email	Facilities	Thursday	Marketing	Live members with no email address in email field	Monitor overall email capture for use with communications.
Members	Live members	Mobile	Facilities	Thursday	Marketing	Live members with no mobile number in mobile field	Monitor overall mobile capture for use with communications.
Members	Live members	PTL Renewal		Week 4	Admin		
Members	Live members	Birthdays	Retention	Week 3	Marketing	Live members with birthday each month	Promote birthday parties Send happy birthday messages (retention) Identify members due new membership type due to age
Members	Live members	Last visit		Thursday	Fitness	Live members last recorded visit by month and year	Identify sleepers and send newsletter to active live members only
Members	Live members	Status	Facilities	Week 1	Admin	Live members by status, frozen/suspended membership	Identify members who require communications e.g. suspended, frozen...
Members	Live members	Age by membership	Facilities	Thursday	Admin	Live members by age group	Identify all members who have an invalid membership type for their age
Members	Live members	Title by gender		Week 4	Admin	Live members title by gender	Identify members with wrong title for specified gender - correct title or gender or add pop-up message if unknown
Members	Live members	Title by age		Week 3	Admin	Live members title by age	Identify members with wrong title for specified age - correct title or age or add pop-up message if unknown
Members	Live members	Payment method		Monday	Admin	Live members split by payment method (Cash or BACS)	Review against targets for all members
Members	Live members	Age by Gender		Monday	Admin		
Members	New members	Master new member count		Tuesday	Operations	All new members by their priority membership	
Members	New members	New core memberships		Wednesday	Operations	New members by their priority membership for core memberships	Review against targets. Use to change sales tactics where necessary
Members	New members	Last visit		Thursday	Fitness	New members last recorded visit by month and year	Identify new members who have not visited in the last month\ determine and fix cause

When and what are they actioning

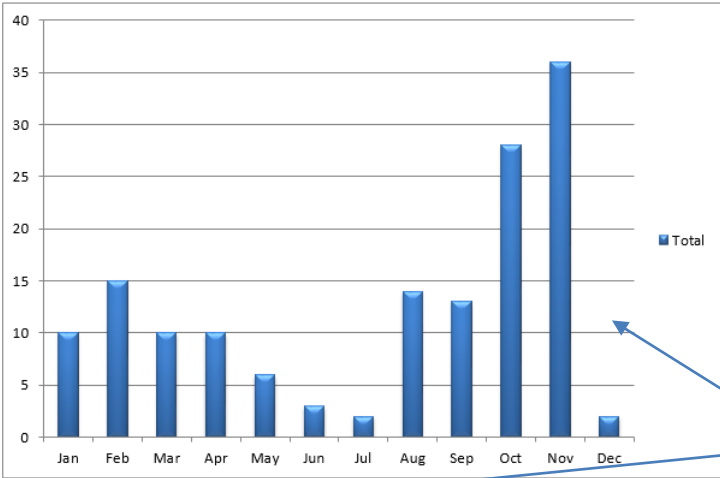
What actions from Data



Venue	(All) ▾
Title	(All) ▾
Age	(All) ▾
AgeGroup	(All) ▾
Gender	(All) ▾
PostcodeArea	(All) ▾
PostcodeDistrict	(All) ▾
PostcodeSector	(All) ▾
JoinYear	(All) ▾
JoinMonth	(All) ▾
StartYear	(All) ▾
StartMonth	(All) ▾
EndYear	(All) ▾
EndMonth	(All) ▾
MemTypeGroup	(All) ▾
MembershipType	(All) ▾
OverallStatus	(All) ▾
FIAType	(All) ▾
CustomerType	(All) ▾
LastVisit	(All) ▾
MembershipLength	(All) ▾

Hyperlink to age change letter
 Hyperlink to birthday reward
 Hyperlink to birthday parties

Birthdays (excluding unknown)



Data displayed in understandable format

No of Members	
DOB	Total
Jan	10
Feb	15
Mar	10
Apr	10
May	6
Jun	3
Jul	2
Aug	14
Sep	13
Oct	28
Nov	36
Dec	2
Grand Total	149

Core members	Postcodes	Email	Mobile	Birthdays	Last visit	Overall status	Age by membership	Title by gender	Title by age	Payment method	Renewals
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Departmentalised with Colour

Think

Sorted by performance

Commercial data

Booking utilisation



BkgDate (All) Gender (All) AgeGroup (All)

Data		Avail Hrs	UnAvail Hrs	Bkd Hrs	Bkd %	UnBkd Hrs	UnBkd %	Bkd Slots	Bkg Count	Paid Slots	Paid %	UnPaid Slots	Unpaid %
Beach Hall	Mon	26.0	0	10.0	38.5%	16.0	61.5%	20	8	20	100.0%	0	0.0%
	Tue	26.0	0	21.0	80.8%	5.0	19.2%	42	10	42	100.0%	0	0.0%
	Wed	26.0	0	26.0	100.0%	0.0	0.0%	52	12	52	100.0%	0	0.0%
	Thu	26.0	0	20.0	76.9%	6.0	23.1%	40	9	40	100.0%	0	0.0%
	Fri	26.0	0	6.0	23.1%	20.0	76.9%	12	6	12	100.0%	0	0.0%
	Sat	28.0	0	17.0	60.7%	11.0	39.3%	34	6	34	100.0%	0	0.0%
	Sun	22.0	0	16.0	72.7%	6.0	27.3%	32	5	32	100.0%	0	0.0%
Beach Hall Total		180.0	0	116.0	64.4%	64.0	35.6%	232	56	232	100.0%	0	0.0%
Gymnasium		202.5	0	103.0	50.9%	99.5	49.1%	206	102	200	97.1%	6	2.9%
Squash Courts		267.0	0	132.5	49.6%	134.5	50.4%	265	55	211	79.6%	54	20.4%
Cafe Area		85.0	0	37.0	43.5%	48.0	56.5%	74	31	20	27.0%	54	73.0%
Drama Studio		90.5	0	37.0	40.9%	53.5	59.1%	74	56	59	79.7%	15	20.3%
Active Studio		106.5	0	40.5	38.0%	66.0	62.0%	81	41	79	97.5%	2	2.5%
Meeting Rooms		88.0	0	29.5	33.5%	58.5	66.5%	59	25	57	96.6%	2	3.4%
Main Hall 2		352.0	0	114.0	32.4%	238.0	67.6%	228	64	228	100.0%	0	0.0%
Main Hall		3494.0	0	1122.5	32.1%	2371.5	67.9%	2245	581	1950	86.9%	295	13.1%
B Active Gym		1700.0	0	507.0	29.8%	1193.0	70.2%	1014	858	1014	100.0%	0	0.0%
Active Gym		1570.0	0	465.5	29.6%	1104.5	70.4%	931	555	931	100.0%	0	0.0%
B Active Circuit Gym		1357.5	0	394.0	29.0%	963.5	71.0%	788	34	728	92.4%	60	7.6%
Squash Court		479.0	0	138.0	28.8%	341.0	71.2%	276	155	251	90.9%	25	9.1%
Academy Hall 2		89.0	0	22.0	24.7%	67.0	75.3%	44	13	42	95.5%	2	4.5%
Academy Hall 1		89.0	0	20.5	23.0%	68.5	77.0%	41	8	41	100.0%	0	0.0%
Swimming Pool		2933.0	0	617.0	21.0%	2316.0	79.0%	1234	213	839	68.0%	395	32.0%
Fitness Suite		10560.5	0	2044.5	19.4%	8516.0	80.6%	4089	2946	4083	99.9%	6	0.1%
Town Hall		452.0	0	86.0	19.0%	366.0	81.0%	172	49	170	98.8%	2	1.2%
G P Area		174.0	0	32.0	18.4%	142.0	81.6%	64	15	52	81.3%	12	18.8%
Performance Gym		2299.5	0	316.5	13.8%	1983.0	86.2%	633	515	633	100.0%	0	0.0%
Cycling Studio		88.0	0	10.5	11.9%	77.5	88.1%	21	15	21	100.0%	0	0.0%
Synthetic Pitch		948.0	0	113.0	11.9%	835.0	88.1%	226	79	210	92.9%	16	7.1%
Creche		1876.0	0	206.0	11.0%	1670.0	89.0%	412	164	396	96.1%	16	3.9%
Hall		304.0	0	32.0	10.5%	272.0	89.5%	64	2	64	100.0%	0	0.0%
Studio		177.0	0	16.5	9.3%	160.5	90.7%	33	27	29	87.9%	4	12.1%
Football Pitches		4495.0	0	349.0	7.8%	4146.0	92.2%	698	29	690	98.9%	8	1.1%
Athletics		1602.0	0	108.0	6.7%	1494.0	93.3%	216	3	72	33.3%	144	66.7%
Health Suite		5303.0	0	334.0	6.3%	4969.0	93.7%	668	515	668	100.0%	0	0.0%
All Weather Courts		181.0	0	7.0	3.9%	174.0	96.1%	14	6	9	64.3%	5	35.7%
Academy Hall Main		178.0	0	6.0	3.4%	172.0	96.6%	12	1	12	100.0%	0	0.0%
Sports Hall		568.0	0	16.0	2.8%	552.0	97.2%	32	2	32	100.0%	0	0.0%
Scenes A Side Pitch		210.0	0	9.0	4.3%	201.0	95.7%	16	2	16	100.0%	0	0.0%

Drill down to day, Hour etc

Top 5 wins from solutions

Think

- *Retention- Sleeper rates, length of stay and attrition*
- *Prospecting- Ex members, casual upgrades*
- *Utilisation of space- who has filled that space before, are you looking forward*
- *Chasing money that is yours- Bacs rejects, bookings, classes and refunds*
- *Spend per swipe- ad spend strategy*

(You may have seen these before on the Pareto slide)

Summary

- *List of data*
- *Who is responsible?*
- *Was it actioned?*
- *How commercial are you?*
- *Top 5 commercial (Pareto) Actions from solutions*



Think

What other data?



Customer feedback



What?	Why
<ul style="list-style-type: none">• Amount of feedback• Trend Analysis• Completed• Still to Action	<ul style="list-style-type: none">• Increase in expectation levels• Better retention• Increased staff training

By product INCREASED REVENUE!

Pool data



What?	Why
<ul style="list-style-type: none">• Out of range results %• Action needed• Response times• Maintenance completion	<ul style="list-style-type: none">• Less down time• Decreased costs• Better service

By product REDUCED EXPENDITURE!

Fussy customer walks (standards audits)

Plan

STANDARDS

What?	Why
<ul style="list-style-type: none">• What needs actioning• Time to complete• Who's accountable to make good• Commercial opportunities• Marketing audits• General standards• Etc.	<ul style="list-style-type: none">• Better 1st impression• Improved standards• Improved likelihood of referral• Improved staff training

By product INCREASED REVENUE!

Maintenance data



What?	Why
<ul style="list-style-type: none">• Task completion• Down time• Equipment needed to prevent downtime	<ul style="list-style-type: none">• Less downtime• Better service• Better retention

By product DECREASED EXPENDITURE!

Accident data



What?	Why
<ul style="list-style-type: none">• Number of accidents• Location• Trend analysis (type and location)• Riddor• Completed	<ul style="list-style-type: none">• Better chance of preventing accidents• Less accidents• Decrease in insurance (claims and cost)• Better customer care

By product DECREASED EXPENDITURE!

H&S data



What?	Why
<ul style="list-style-type: none">• COSHH• Risk assessments• Accidents• Daily, weekly, monthly checks• Building• Maintenance contracts• SLAs	<ul style="list-style-type: none">• Decrease in insurance (claims and cost)• Better customer care• Less downtime• Less complaints to deal with

By product DECREASED EXPENDITURE!

Prospecting Data

Why?



Lead Generation

In reach, outreach & POS refs

Walk-ins
Phone enquiries

Activity levels

Calls, tours and lead generation

Critical information

Source
Why prospects are not joining
Corporate information

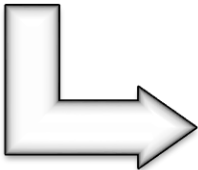
Skill levels

Contact to
Apt %
Show %
Close %
POSR %

40-65%
Of income

Think

So now we know what to do



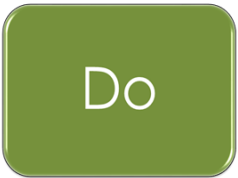
Plan

And we know why we are doing it



Do

FlexiForms - standards audit



FlexiForm - Building Audit

Select FlexForm: Building Audit

Batch Title: Building Audit 2013-10-26 [Mark Batch as Complete]

Items in Batch: Lower plant room [Add] [Store] [Revert] [Delete]

Quick add fields

Site: [Dropdown]
Date of Audit: 26/10/2013 [Calendar]
Area/Location: Lower plant room [Dropdown]
Description Of Issue: Menerga blocked

Issue details

Responsible Dept: Facilities [Dropdown]
Responsible Person: Frances Green
Priority: High [Dropdown]
Action: The menerga is blocked again, it needs another attempt at cleaning it out before we call menerga - sensors cleaned ongoing
Department To Action: [Dropdown]
Cost Involved: Yes No
Quote Required: Yes No
In Budget: Yes No
Capital Issue (Over £500): Yes No
Target Date: 01/12/2013 [Calendar]
Actual Date: 05/11/2013 [Calendar]

[Add New Batch]

Select the area needed

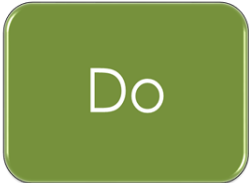
What is the issue?

What needs doing and by who?

Other filters and reports

Was it completed in time?

Sample report – from FlexiForms



10.72.254.126//ReportSelection/Edit/83

Powered By **cascade^{3d}online**
Logged in as Gerry Hodgson

Edit Report - Standards Audit High Priority Report YLC

Select Report Selection: [Initial Template]

Criteria Columns Results Pivot Matrixes

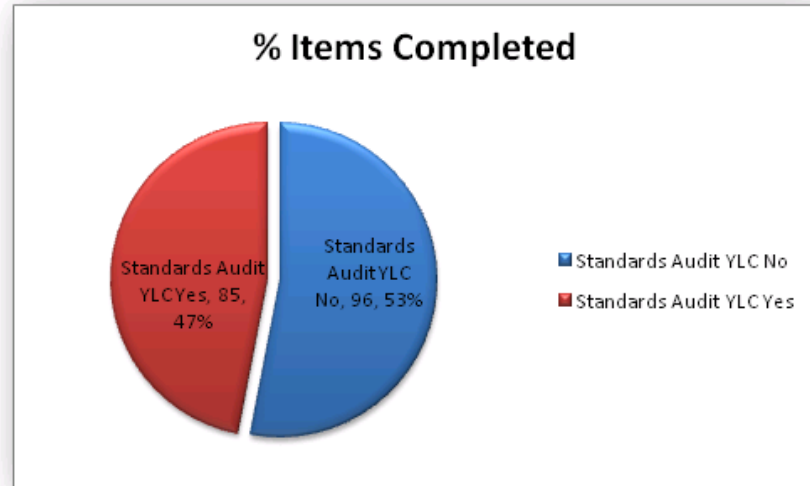
XLSX XLS CSV

Audit Date	Area Location	Completed	Overdue Days	Overdue	Description Of Issue	Responsible...	Responsible Person ▲	Priority	Action
2014-05-15	Softplay	No	68	Yes	Softplay carpet dirty by entrance	Operations	MS003 - Matt Simmons	High	Prest
2014-05-15	Village Change	No	37	Yes	Locker 43 no door	Operations	AL001 - Andy Lathall	High	Andy
2014-05-15	Cafe.re	No	68	Yes	Tv broken	Catering	KR002 - Karen Richards	High	New
2014-01-29	Pool Viewing	Yes	0	No	Fire exit sign to be replaced	Operations	MS003 - Matt Simmons	High	Matt t
2014-05-15	Staff Room	No	37	Yes	Frosting on window	Operations	MS003 - Matt Simmons	High	Voo c

Excel PivotTable and Pivot Graphs

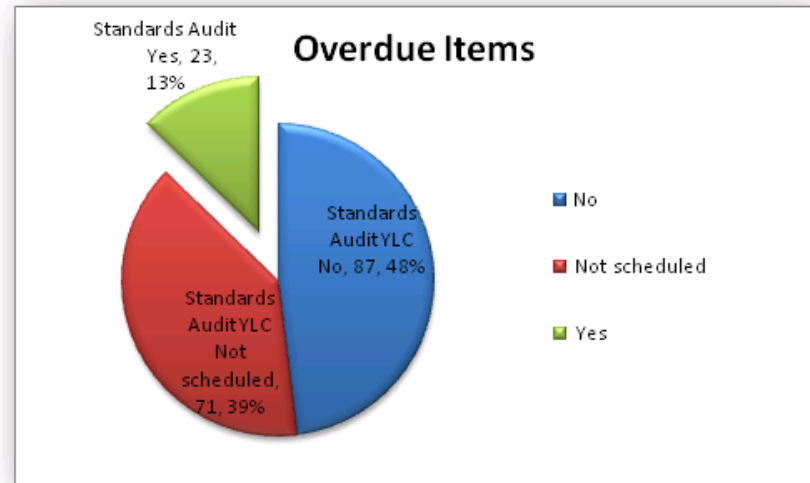
AuditDate (All)
 Priority (All)

Count of Items		
FormName	Completed	Total
Standards Audit	No	96
	Yes	85
Standards Audit	Total	181
Grand Total		181



Priority (All)

Count of FormResultID		
FormName	Overdue	Total
Standards Audit	No	87
	Not scheduled	71
	Yes	23
Standards Audit	Total	181
Grand Total		181



FlexiForm - Accident log



FlexiForm

Select FlexForm: Accident

Accidents 30/04/14

Batch Title: Accidents 30/04/14 [Mark Batch as Complete]

Items in Batch: Fred Smith 30/04/14 [Edit] [Add] [Store] [Revert] [Delete]

Accident Form

All fields are to be completed immediately by the person treating the casualty

Accident Ref: 1234

Accident Type: Accident

1. Casualty Details

Title: -

Forename: Fred

Surname: Smith

Gender: Male Female

Date of Birth: 14/01/2009

Age: 5

Address: [Text Area]

Postcode: [Text Field]

Home Telephone: 558956

Work Telephone: [Text Field]

Mobile Telephone: [Text Field]

Person Category: Customer

[Add New Batch]

Record all personal, accident, treatment and witness details

RIDDOR alert

Analyse by facility area, injury type etc

FlexiForm - Pool test log

FlexiForm - Building Audit

Select FlexForm: Pool Tests

Batch Title: MP 13/03/14 15:00 Mark Batch as Complete

Items in Batch: MP 13/03/14 15:00 Edit Add Store Revert Delete

MP 13/03/14 21:00
MP 13/03/14 18:00
MP 13/03/14 15:00
MP 13/03/14 12:00
MP 13/03/14 10:00
MP 13/03/14 07:00
MP 12/03/14 21:00
MP 12/03/14 18:00
MP 12/03/14 15:00
MP 12/03/14 12:00
MP 12/03/14 10:00
MP 12/03/14 07:00
MP 11/03/14 21:00
MP 11/03/14 18:00
MP 11/03/14 15:00
MP 11/03/14 12:00
MP 11/03/14 10:00
MP 11/03/14 07:00
MP 10/03/14 21:00
MP 10/03/14 18:00
MP 10/03/14 15:00
MP 10/03/14 12:00
MP 10/03/14 10:00
MP 10/03/14 07:00

Facility:

Pool Name: Main Pool

Reading Date/Time: 13/03/2014

Reading Time: 07:00 10:00 12:00 15:00 18:00 21:00

Free Chlorine: 1

Total Chlorine: 2

Combined Chlorine: 1

PH: 8

Water Temperature: 29

Air Temperature: 24

Bathing Load: 5

Alkalinity:

Calcium Hard:

Total Dissolved Solids:

Balance Tank Level: Empty 1/4 1/2 3/4 Full

Total Water Balance Test Completed: Yes No

Signed: GRH

Comments:

Add New Batch

Think

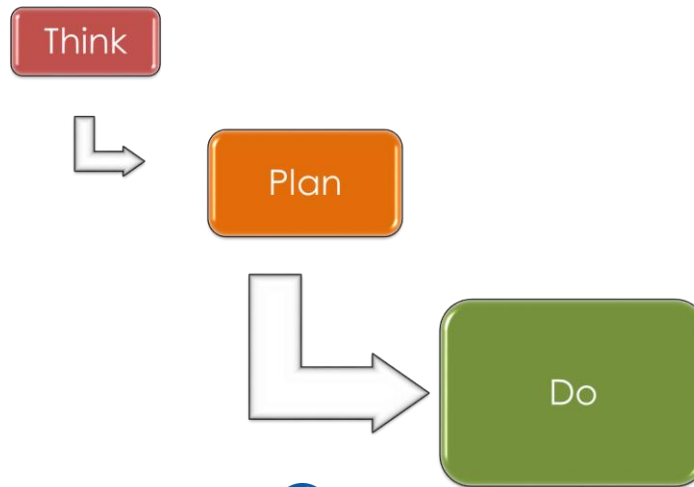
Summary what other data?



Customer data

- *Presented by Proinsight*
- *Video of what they see*
- *Dashboard of information*
- *What actions does this show us*

What do the Managers need to do throughout the month?



Ops Manager Daily, Weekly & Monthly Time Task Planner



Month: _____

Daily	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	
CM/DCM Checklist																																
Update Target Tracker																																
Reconcile Banking and report to Admin																																
Setup with each supervisor																																
Check / Log all maintenance																																
Make sure all checklists are done																																
Final Plant Room Check																																
See what appointments are due in today																																
Spend 45 minutes with FOH and FL, observe and coach																																
Call address File																																

Monday	Week One	Week Two	Week Three	Week Four	Week Five	Comments / Notes	
Stock Management and orders (incl cleaning products)							
Update additional spend tracker							
Weekly set-up with Objectives to all HOD's							
Club Walk							
Sign off all Checklists and File							
Give out new weekly audit sheets to HOD's							
HOD Meeting with minutes							

Tuesday	Week One	Week Two	Week Three	Week Four	Week Five	Comments / Notes	
Stock Orders							
Call and Sign off all member feedback							
HOD Meeting							
Bank Cash							
Panic and Fire alarm test							
Referred to Gym Room/FOH							

Wednesday	Week One	Week Two	Week Three	Week Four	Week Five	Comments / Notes	
Print weekly communication for staff							
Team Meeting and minutes, signed by team							
Prep for weekly meeting							
Maintenance List							
Referred to Gym Room/FOH							

Thursday	Week One	Week Two	Week Three	Week Four	Week Five	Comments / Notes	
Call and Sign off all feedback							
Update all marketing							
Setup weekend							
Invoice & PO's							
Referred to Gym Room/FOH							

Friday	Week One	Week Two	Week Three	Week Four	Week Five	Comments / Notes	
Petty Cash							
Online receipting							
Collect all agreements with action plan and discuss with CM							
Declutter Gym & FOH							
Ensure utility reports are completed and send							
Cleaning Audit							

Monthly	Date	Comments / Notes
New Marketing Up	1st	
Full Team Meeting/Launch with sign off	3rd	
Update monthly events with licensee's	4th	
Complete E-mail letter	5th	
Complete monthly sales plan with CM and HOD's	5th	
Emergency Light testing	5th	
121 Objective Setting/KPI Review	7th	
P&L Review Meeting with CM	8th	
Payroll	14th	
	15th	
	16th	
Update Member Relations Board	17th	
Schedule meeting with all licensees	20th	
Update Leave/Training Calendar	20th	
Rates & Cap. Complete 6 weeks in advance	20th	
NARS and FAAR refresh training	25th	
	25th	
Full P&L Audit	25th	
Check all Marketing Has & Review	26th	

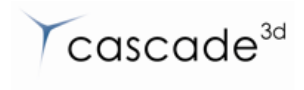
1st hour of the day

Check the checks

Are you prepared for the shift ahead?

Ops Manager Daily, Weekly & Monthly Time Task Planner

Month: _____



Daily	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
CM / DCM Checklist																															
Update Target Tracker																															
Reconcile Banking and sent to Admin																															
Set-up with each supervisor																															
Chase / Log all maintenance																															
Make sure all checklists are done																															
Pool Plant Room Check																															
See what appointments are due in today																															
Spend 45 minutes with FOH and FI, observe and coach																															
Call addacs File																															

Train the people who have done the checks. Don't assume that they know how to do it properly. 45-30 mins per day

Allocate another three hours worth of work a day

Sign off when done

Plan

Monday	Week One	Week Two	Week Three	Week Four	Week Five
Stock Management and orders (incl cleaning products)					
Update additional spend tracker					
Weekly set-ups with Objectives to all HOD's					
Club Walk					
Sign off all Checklists and file					
Give out new weekly audit sheets to HOD's					
HOD Meeting with minutes					

Tuesday	Week One	Week Two	Week Three	Week Four	Week Five
Stock Orders					
Call and Sign off all member feedback					
HOD Meeting					
Bank Cash					
Panic and Fire alarm test					
Referrals/Gym Rev/FOH					

Wednesday	Week One	Week Two	Week Three	Week Four	Week Five
Print weekly communication for staff					
Team Meeting and minutes, signed by team					
Prep for weekly meeting					
Maintenance List					
Referrals/Gym Rev/FOH					

Thursday	Week One	Week Two	Week Three	Week Four	Week Five
Call and Sign off all feedback					
Update all marketing					
Setup weekend					
Invoices & PO's					
Referrals/Gym Rev/FOH					

Friday	Week One	Week Two	Week Three	Week Four	Week Five
Petty Cash					
Online receipting					
Collect all assessments with action plans and discuss with					
Declutter Gym & FOH					
Ensure utilities report are completed and send					
Cleaning Audit					

Prioritise the tasks so if something doesn't get done, it's the least important task uncompleted

Write down the outcomes, and what you would do differently

Month specific tasks

Spread tasks evenly over the month, not just beginning and end

Create safety nets to ensure important tasks are completed and not rushed

Monthly	Date	Comments / Notes
New Marketing Up	1st	
Full Team Meeting/Launch with sign off	3rd	
Update monthly events with licencees's	4th	
Complete E-newsletter	5th	
Complete monthly sales plan with CM and HOD's	5th	
Emergency Light testing	6th	
121 Objective Setting/KPI Review	7th	
P&L Review Meeting with CM	8th	
Payroll	14th	
	15th	
	16th	
Update Member Relations Board	17th	
Schedule meetings with all licencees	20th	
Update Leave/Training Calendar	20th	
Rota & Cop Complete 6 weeks in advance	20th	
NARS and FAWW refresher training	25th	
	25th	
Full Pool Audit	25th	
Check all Marketing Has Arrived	25th	
Locker Clearance	27th	
Submit full stock take	28th	
New Targets	28th	

If something doesn't happen, explain why rather than signing off

Where does solutions fit in?



Solutions reports templates

Section of Data	Source report name	Spreadsheet Tab	Who	Frequency	Department	Definition	Action
Members	Live members	Email	Facilities	Thursday	Marketing	Live members with no email address in email field	Monitor overall email capture for use with communications.
Members	Live members	Mobile	Facilities	Thursday	Marketing	Live members with no mobile number in mobile field	Monitor overall mobile capture for use with communications.
Members	Live members	PTL Renewal		Week 4	Admin		
Members	Live members	Birthdays	Retention	Week 3	Marketing	Live members with birthday each month	Promote birthday parties Send happy birthday messages (retention) Identify members due new membership type due to age
Members	Live members	Last visit		Thursday	Finance	Live members last recorded visit by month and year	Identify sleepers and send newsletter to active live members only
Members	Live members	Status	Facilities	Week 1	Admin	Live members by status, frozen/suspended membership	Identify members who require communications e.g. suspended, frozen...
Members	Live members	Age by membership	Facilities	Thursday	Admin	Live members by age group	Identify all members who have an invalid membership type for their age
Members	Live members	Title by gender		Week 4	Admin	Live members title by gender	Identify members with wrong title for specified gender - correct title or gender or add pop-up message if unknown
Members	Live members	Title by age		Week 3	Admin	Live members title by age	Identify members with wrong title for specified age - correct title or age or add pop-up message if unknown
Members	Live members	Payment method		Monday	Admin	Live members split by payment method (Cash or BACS)	Review against targets for all members
Members	Live members	Age by Gender		Monday	Admin		
Members	New members	Master new member count		Tuesday	Operations	All new members by their priority membership	Review against targets. Use to change sales tactics where necessary
Members	New members	New core memberships		Wednesday	Operations	New members by their priority membership for core memberships	
Members	New members	Last visit		Thursday	Finance	New members last recorded visit by month and year	Identify new members who have not visited in the last month, determine and fix cause

Bringing data to life

Ops Manager Daily, Weekly & Monthly Time Task Planner



Month: _____

Daily	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	
OH/DOH Checklist Update Times Tracker Bi-weekly Marketing and Lead to Admin Set up with a sales representative Check if any off-site activities Make sure all checklists are done Pull Past Month Check Set up all appointments for the next 4 weeks Spend 45 minutes with TOM and FL, Libby and coach Call the team file																																
Monday Check Management and Lead (and do not miss products) Update address reports and monitor Work to set up with OH/DOH team to all MOODY Club Walk Spend all checklists on file Give out new weekly on file to OH/DOH to MOODY MOODY call with monitor	Week One	Week Two	Week Three	Week Four	Week Five	Comments / Notes																										
Tuesday Call and Sign off all member for 4h club MOODY parties Bank Club Finance and fix alarm last Refer to OH/DOH Run off OH	Week One	Week Two	Week Three	Week Four	Week Five																											
Wednesday Print weekly communication for staff Team Meeting and monitor, priority to team Prep for weekly meetings Print new core list Refer to OH/DOH Run off OH	Week One	Week Two	Week Three	Week Four	Week Five																											
Thursday Call and Sign off all for 4h club Update all marketing Setup weekend Inventory & PQL Refer to OH/DOH Run off OH	Week One	Week Two	Week Three	Week Four	Week Five																											
Friday Party Club Online re-creating Call all appointments with sales plan and discuss with OH Distribute team 3rd row Ensure all other reports are completed and send Cleaning desk	Week One	Week Two	Week Three	Week Four	Week Five																											
Monthly New Marketing Up Full Team Meeting with OH/DOH Update monthly reports with Libby and OH Complete OH newsletter Complete monthly reports with OH and OH/DOH Emergency Light testing TFL OH/DOH Setup and OH/DOH PQL Review Meeting with OH/DOH Payroll Update Member Roll over Board Schedule meeting with OH/DOH Update Leave and Absence Calendar Bank & Cap Check with Libby and Libby NARS and FAWW referral to Libby Full Past Month Check all checklists with Libby	Date																															

Where does Pareto fit in?



Transforming people's working lives

Ops weekly HOD meeting sheet

Date: _____ Team member: _____

Ops Manager Daily, Weekly & Monthly Time Task Planner



Month:	Days																														
Month:	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
Ops Manager Daily	[Grid for daily tasks]																														
Monday	Work One	Work Two	Work Three	Work Four	Work Five	Comments / Notes																									
Tuesday	Work One	Work Two	Work Three	Work Four	Work Five	Comments / Notes																									
Wednesday	Work One	Work Two	Work Three	Work Four	Work Five	Comments / Notes																									
Thursday	Work One	Work Two	Work Three	Work Four	Work Five	Comments / Notes																									
Friday	Work One	Work Two	Work Three	Work Four	Work Five	Comments / Notes																									
Monthly	[Grid for monthly tasks]																														

Issue	Outcome	Y/N
Review of previous meeting action points		
Who has done what		
Add spend break down £ and % 1. Food and drink 2. Sunbeds 3. Sundry 4. Clothing 5. Gym revenue		
Referrals Gym Reception		
Defaulters £ & % Target vs Actual What % claimed back		
Banking Overs and unders for the week Any trends Who		
Petty cash spent for the week and month so far Balance		
Health & Safety issues / Audit result and actions		
Members feedback 1. Comment cards 2. General enquiries		
Cleaning audit Actions		
WDS Issues list % completed		
Interaction Swipe analysis Swell % for upsell Number of OCF completed on team		
Studio Studio launch / open day		

Move GB

Lunch

Why dashboards are the way forward (5 Top Tips)

Will Jones

willjones@cascade3d.com

07808 789155

What is a Dashboard?



What is a Dashboard?

- *“a dashboard is a visual display of the most important information [...] which fits entirely on a single computer screen [...]*
 - *Stephen Few, Information Dashboard Design 2006*

- *“Are we achieving the goals we set out to achieve?”*
 - *Tim Wilson, webanalyticsdemystified.com 2014*

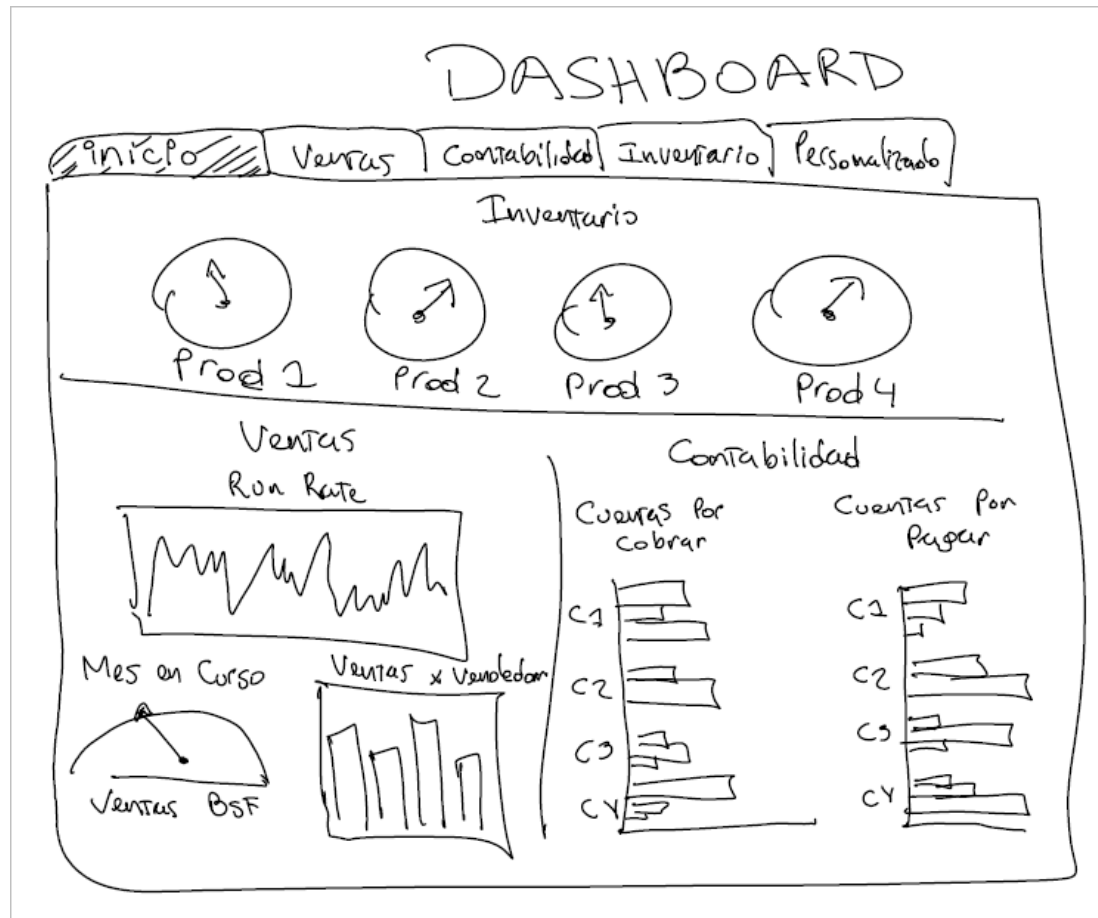
Dashboard Benefits

- *Why should I have a dashboard?*
 - *Visibility*
 - *Ongoing Improvements*
 - *Time Savings*
 - *Monitor Performance*
 - *Employee Engagement*
 - *David Lavinsky, www.forbes.com 2013*
- *Real Time Information*

Simple Dashboards

- *Microsoft Excel Dashboards*
 - *Available now!*
 - *Make your own?*
 - *Ask us to help?*
- *Dashboard Software*
 - *Cascade3dOnline available now, book a demo!*

1. Plan First



1. Plan First

- *Why do you want a dashboard?*
- *Are there specific KPIs you want to see?*
- *Totals or comparisons?*
- *Where will the data come from?*
- *How will it be updated?*
- *Who will receive the report and in what format?*

Plan the most important information carefully...

Significant re-designs of your dashboard may be expensive!

2. One Screen



2. One Screen

- *Dashboards are an 'at-a-glance' view of performance*
- *Stick to one screen!*
 - *One screen per department?*
 - *Have other reports for the detail*

3. All about the 'Widgets'

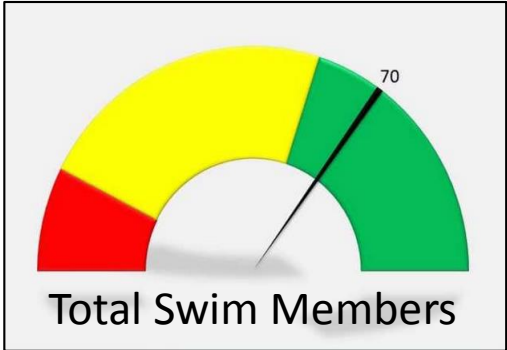
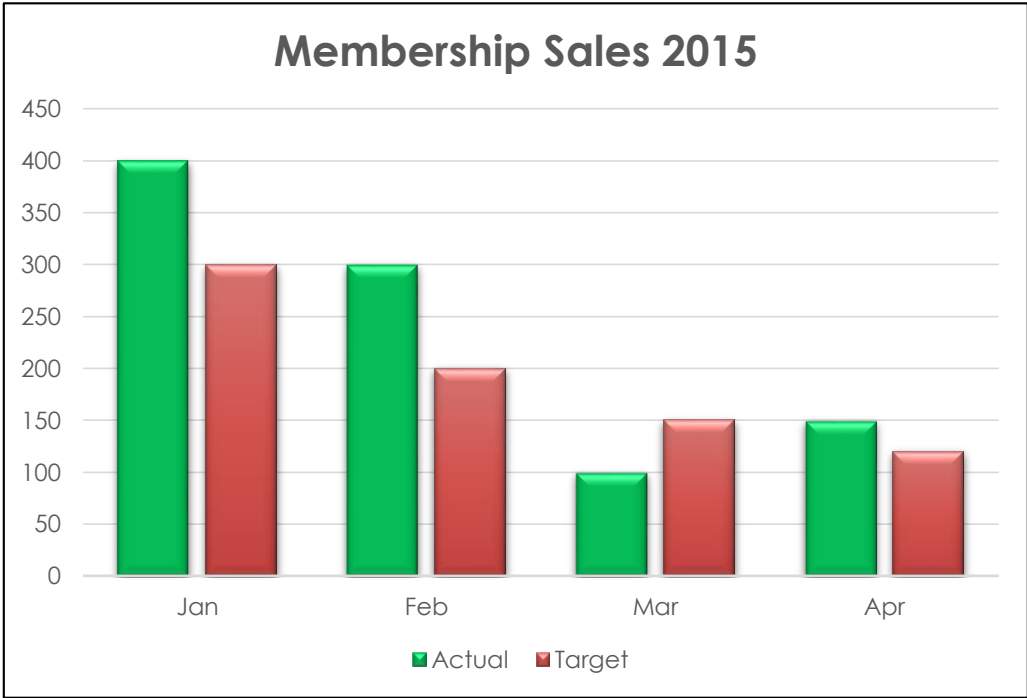
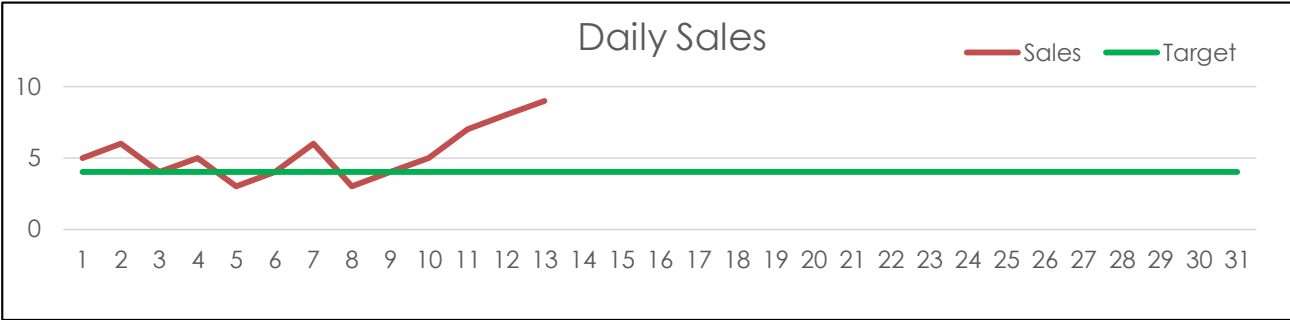


3. All about the 'Widgets'

- *The different elements of your dashboard are known as 'widgets'*
- *How do you want to best display each bit of information?*

Current Target

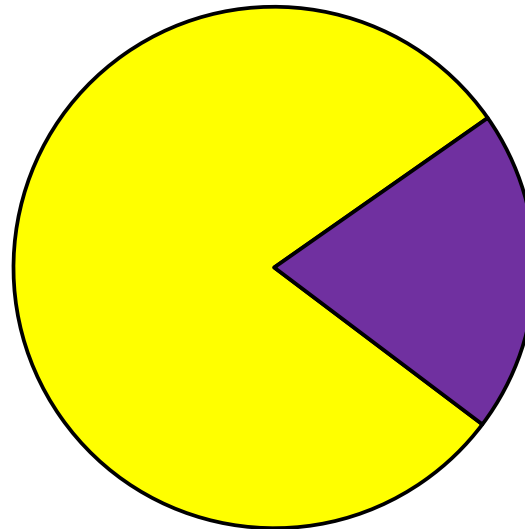
175



3. All about the 'Widgets'

- *Things to avoid*
 - *Charts that state the obvious*

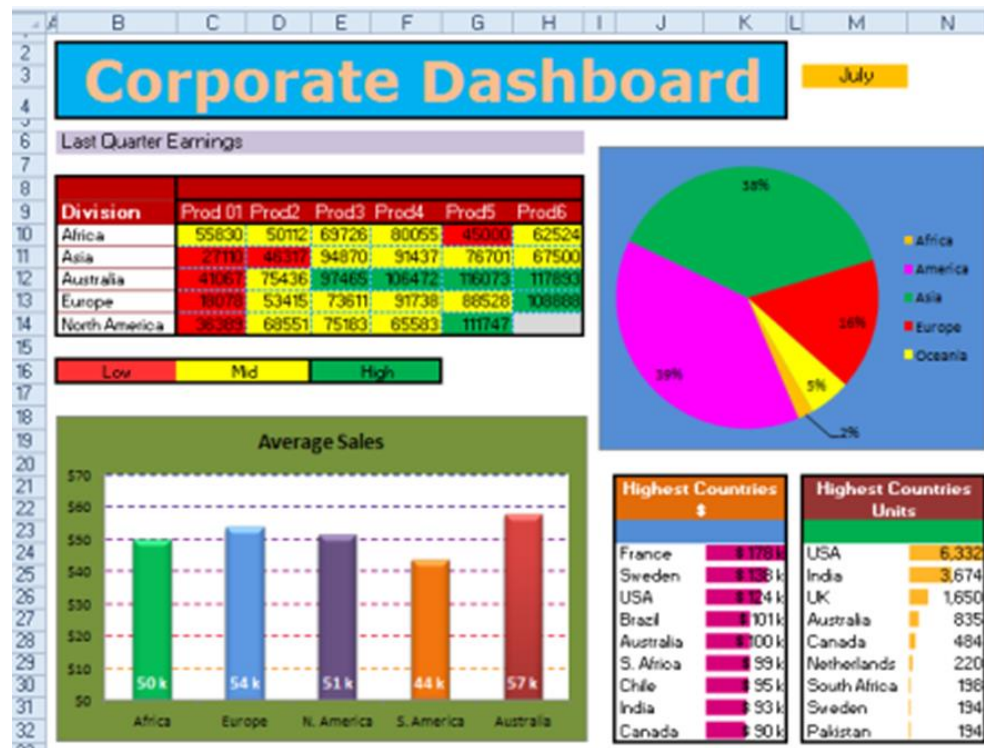
Percentage of Chart Which Resembles Pac-Man



■ Resembles Pac-Man ■ Does Not Resemble Pac-Man

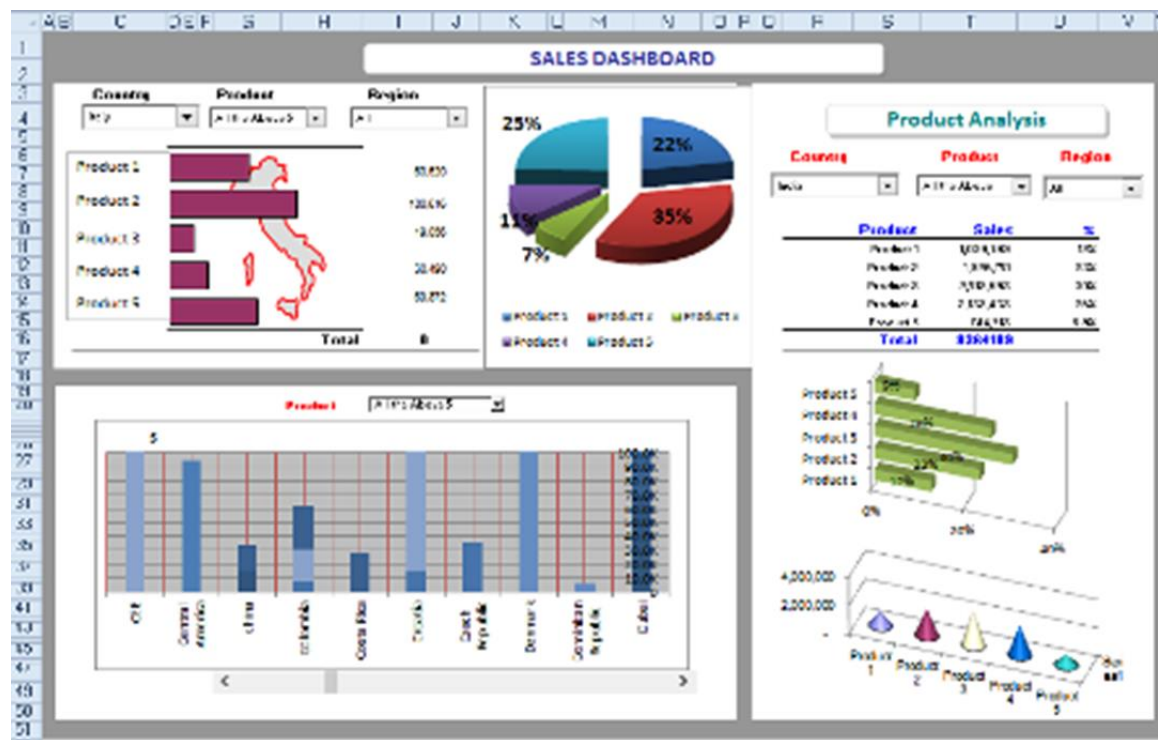
3. All about the 'Widgets'

- *Things to avoid*
 - *Too much colour*



3. All about the 'Widgets'

- *Things to avoid*
 - *Chart clutter*



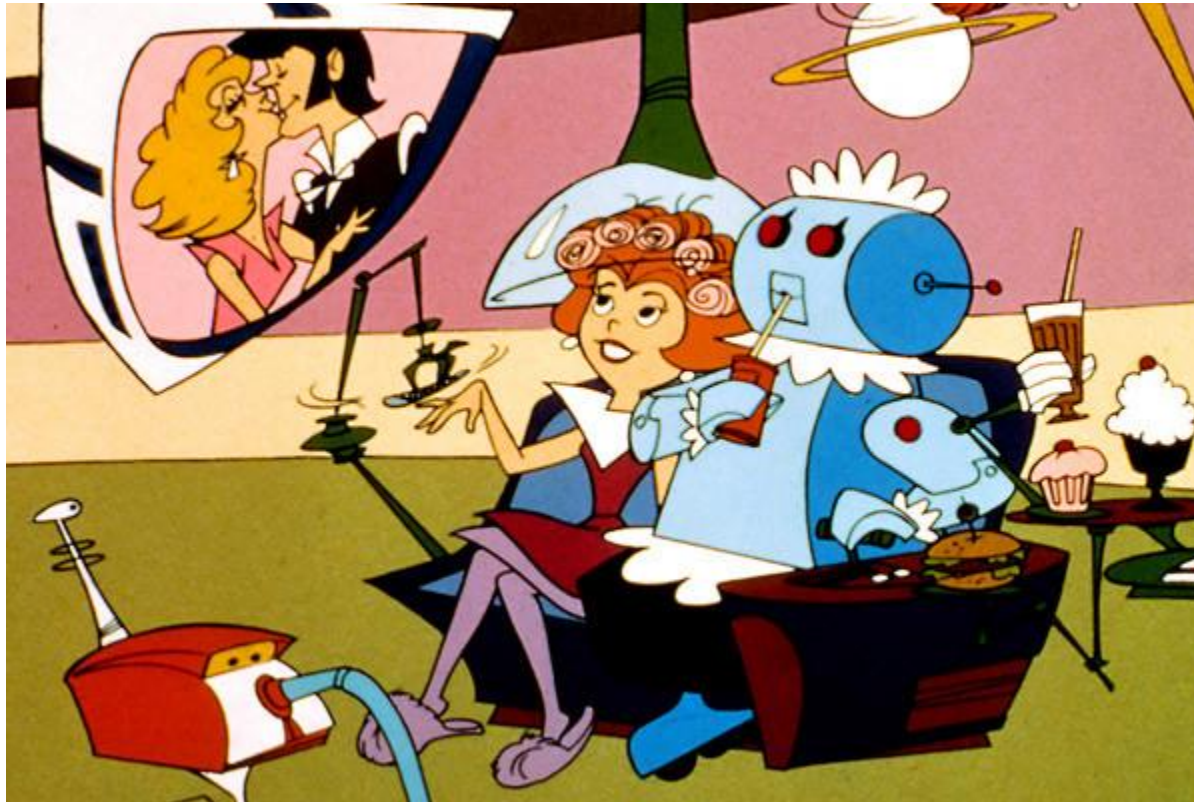
4. Is it Printable?



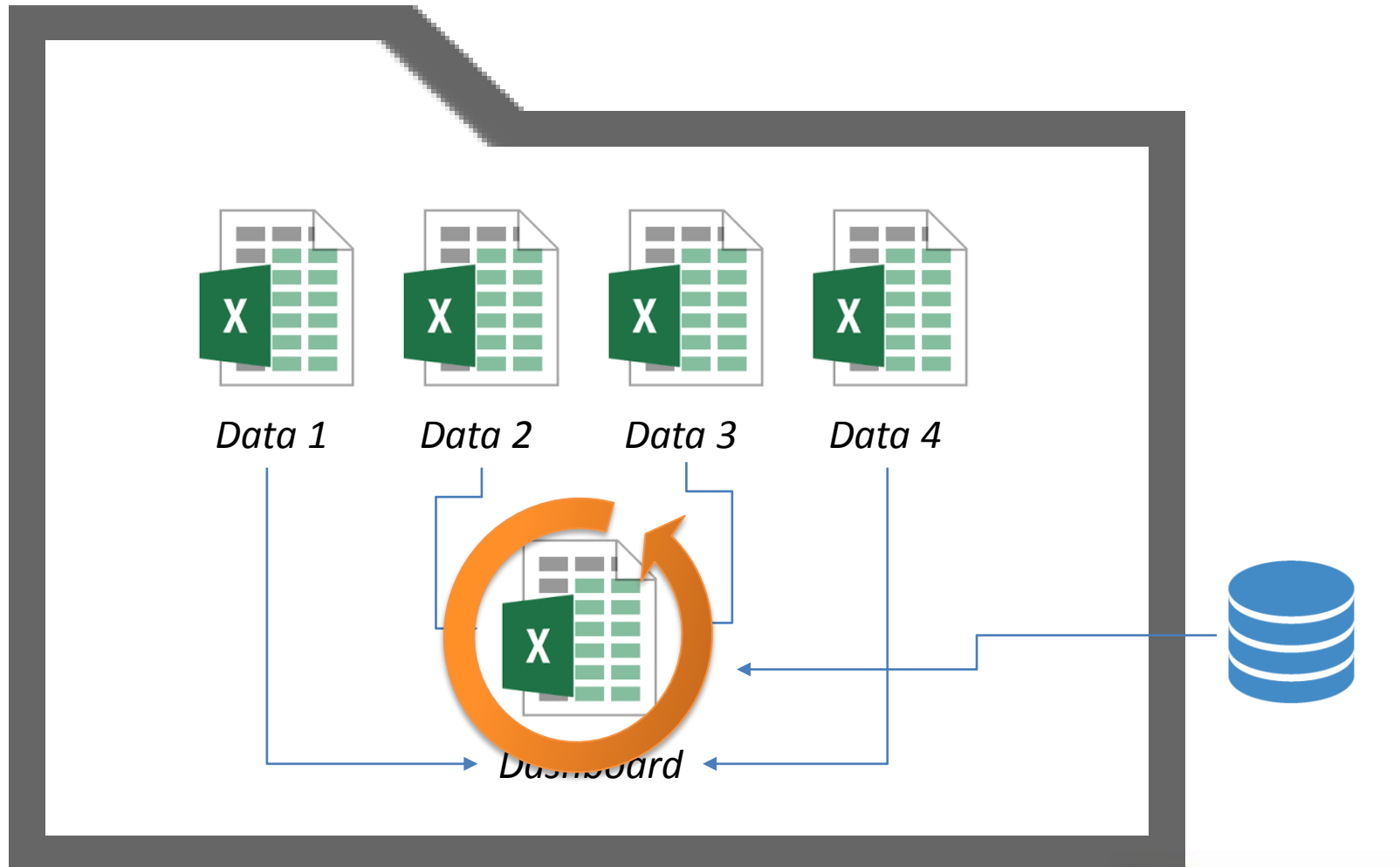
4. Is it Printable?

- *Would this amazing dashboard ever need to be printed?*
 - *To review offline?*
 - *To show staff?*
 - *To take to meetings?*
- *Define the print area as part of the set-up*

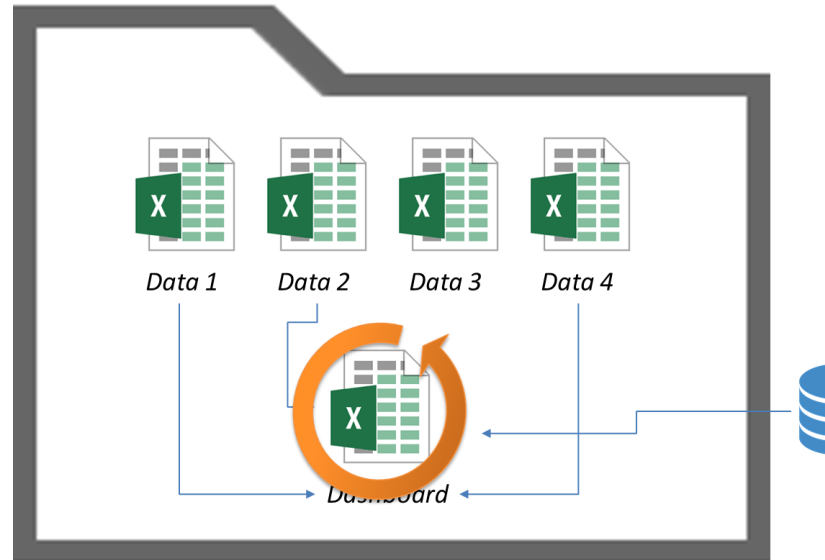
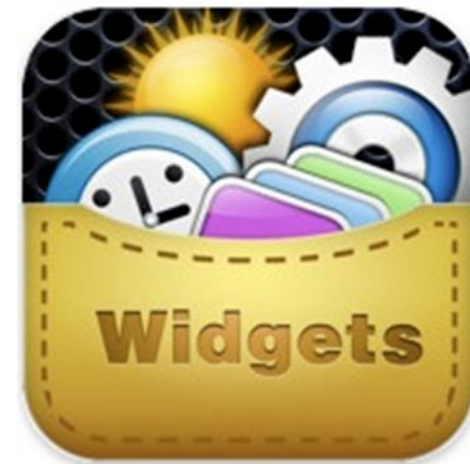
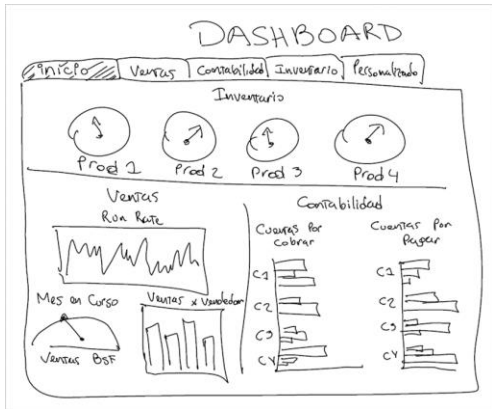
5. Automation



5. Automation



Summary



Departmental dashboards



Business reports template

Module	Report Name	Frequency	Time	Owner	Access	Permissions	Notes
Admin	Admin Dashboard	Real-time	24/7	Admin	Admin	View, Edit, Add, Delete	...
Finance	Finance Dashboard	Real-time	24/7	Finance	Finance	View, Edit, Add, Delete	...
Marketing	Marketing Dashboard	Real-time	24/7	Marketing	Marketing	View, Edit, Add, Delete	...
Operations	Operations Dashboard	Real-time	24/7	Operations	Operations	View, Edit, Add, Delete	...

Admin Dashboard
Finance Dashboard
Marketing Dashboard
Operations Dashboard

Business reports template

- Report 1: Admin Dashboard
- Report 2: Finance Dashboard
- Report 3: Marketing Dashboard
- Report 4: Operations Dashboard

Building a Cascade on page reports

Business reports template

- Report 1: Admin Dashboard
- Report 2: Finance Dashboard
- Report 3: Marketing Dashboard
- Report 4: Operations Dashboard

Fitness Dashboards

48% Sleepers

75% of Inductions completed

Average Class Capacity 89%

16 New members not visited

Number of reviews held 7

Average visits per member 2.4

Attrition rolling 12 months 73%

Bottom 10 courses for action

Gym 2 - 3 Years	33%
Junior Coaching	33%
Frog 16 Mth - 21/2 Y	30%
Tadpole 6 - 15 Mths	21%
Frog 16 Mthy - 21/2	21%
Duckling 2.5 - 3.5yr	20%
Golf	15%
Tadpole 6 -15 Mths	10%
Beginners	0%
Intermediate	0%

Bottom 10 classes for Action

Power Circuits	13%
Terrorzone	9%
Aqua Zumba Launch	8%
Aqua Natal	7%
Power Fitness	6%
Power Boxing	6%
Extreme Youth Zones	5%
Xyz Bootcamp	3%
Xyz Challenge	3%
Long Term Condition	0%

Below Target On Target Above Target

Admin Dashboards

-2% Member movement

3476 Live members

73% Renewed Last Month

£321 owed from DD Contracts

112 Cancelled members

Members on wrong age membership
32

6% Bounce

84% Bounce reclaimed

Unpaid Bookings

Money owed from courses £2100

Money owed from classes £134

Money owed from Bookings £4567

Spend per swipe 28.7p

Below Target On Target Above Target

Marketing Dashboards

40 % of Walkins Closed

Average membership length 7.2
Months

Casuals with more than 1 visit
per week 45

67% Mobile capture

32% Email capture

ROI from last months campaign
142%

Number of communications gone out
this month

Members Journey	201
Upsell to casuals	45
Birthday offer	141
Ex Member capaign	302

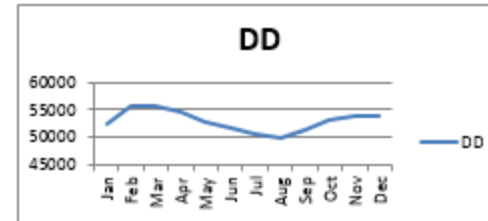
Below Target On Target Above Target

Refunds £3389

Course Capacity 70%

Unders and Overs £72.48

Usage numbers 46,971



Utilisation of Space

Avail Hrs	UnAvail Hr	Bkd Hrs	Bkd %	UnBkd Hr	UnBkd %	Bkd Slots	Bkg Count	Paid Slots	Paid %	nPaid Slots	Inpaid %
54913.0	0	8032.0	14.6%	46881.0	85.4%	16061	7495	14900	92.8%	1161	7.2%

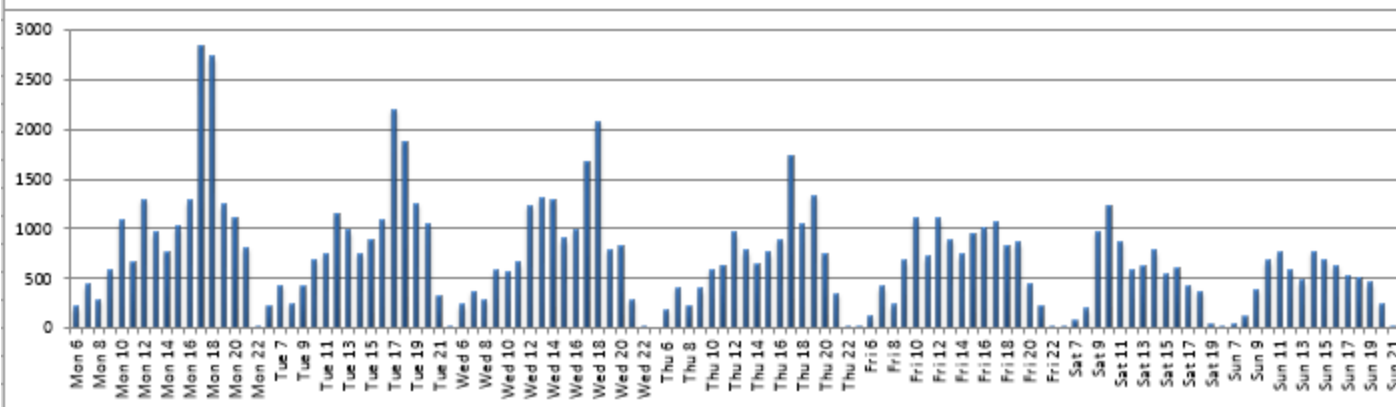
Top 10 Booked locations

Location	Avail Hrs	Bkd Hrs	Bkd %	Unpaid %
Beach Hall	180.0	116.0	64.4%	0.0%
Gymnasium	202.5	103.0	50.9%	2.9%
Squash Courts	267.0	132.5	49.6%	20.4%
New Creche	636.0	283.5	44.6%	0.0%
Cafe Area	85.0	37.0	43.5%	73.0%
Drama Studio	90.5	37.0	40.9%	20.3%
Active Studio	106.5	40.5	38.0%	2.5%
Meeting Rooms	88.0	29.5	33.5%	3.4%
Main Hall 2	352.0	114.0	32.4%	0.0%
Main Hall	3494.0	1122.5	32.1%	13.1%

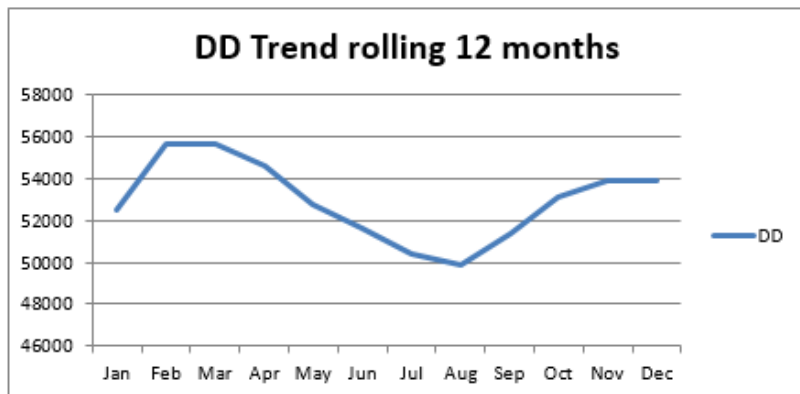
Top 10 Stock items

ShortTrans	Net (£)	Gross (£)	VAT (£)	Units
Membership	£ 12,504.89	£ 15,005.85	£ 2,500.96	643
Badges And	£ 348.25	£ 417.90	£ 69.65	209
Certificates	£ 120.83	£ 145.00	£ 24.17	145
Swimming C	£ 93.16	£ 119.00	£ 19.84	119
(blank)	£ 240.28	£ 287.70	£ 47.42	96
Badges	£ 59.16	£ 71.00	£ 11.84	66
Replacemen	£ 225.75	£ 270.90	£ 45.15	43
Zoggy Seal	£ 67.50	£ 81.00	£ 13.50	30
Nose Clips	£ 56.62	£ 67.94	£ 11.32	24
Goggles Lit	£ 78.75	£ 94.50	£ 15.75	21

Participation By Hour



Bringing data to life



Gross (£)	
TransactionGroup	Total
Wet Courses - Junior	£ 21,716.00
Main Hall	£ 17,955.91
Pool	£ 15,347.66
Membership	£ 15,005.85
Fitness Suite	£ 10,921.85
Classes	£ 9,565.40
Dry Courses - Junior	£ 8,274.20
Outdoor Areas	£ 5,195.70
Stock	£ 4,841.28
Wet Courses - Adult	£ 4,037.70
Parties	£ 3,851.10
Health Suite	£ 2,317.10
Squash Courts	£ 1,610.84
BTS	£ 1,600.00
Internal	£ 1,144.70
Clubs	£ 768.60
Meeting Rooms	£ 738.60
Outdoor Pitches	£ 671.70
Sports Development	£ 470.40
Free Weights	£ 266.80
Sundry	£ 188.05
Outdoor Recreations	£ 59.20
Hire/Deposits	£ 10.00
Schools & College	£ -
No Sale	£ -
Under/Over	-£ 104.70
Grand Total	£ 126,453.94

-2% Member movement

48% Sleepers

Attrition rolling 12 months 73%

3476 Live members

Usage numbers 46,971

Spend per swipe 28.7p

Average Class Capacity 89%

6% Bounce

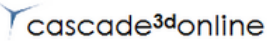
Course Capacity 70%

Average membership length 7.2 Months

Avail Hrs	UnAvail Hrs	Bkd Hrs	Bkd %	UnBkd Hrs	UnBkd %	Bkd Slots	Bkg Count	Paid Slots	Paid %	UnPaid Slots	Unpaid %
54913.0	0	8032.0	14.6%	46881.0	85.4%	16061	7495	14900	92.8%	1161	7.2%










My Dashboard

Plan

Powered By  cascade3donline

Logged in as Matt Simmons

«
KPI Homepage

-  KPI Homepage
-  FlexiReports
-  Members
-  Memberships
-  History
-  Finance
-  Courses
-  FlexiForms
-  Settings

Log Out

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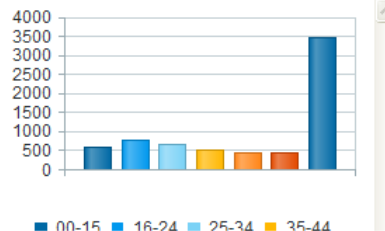
Standards Audit - My Outstanding Items

Priority	Area/Location	Description/Issue	Total
High	Staff Room	Frosting on window	1
Low	Cafe Male Toilet	Door is stained at bottom from dampness	1
Low	Control Room	New flooring	1
Low	Equipment Store	Needs frosting on glass	1
Low	First Aid Room	New roof tiles needed	1
Low	Main Hall	Main entrance doors need painting	1
Low	Main Hall	Walls up to soldier brick level need painting	1

High Priority Issues

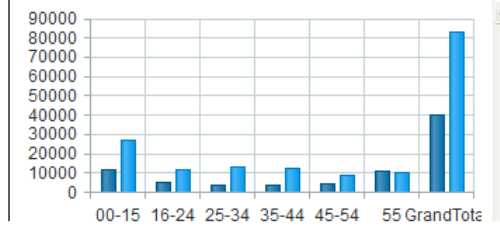
Priority	Description/Issue	Action	Total
High	Baby change table catch needs replaced	{Blank}	1
High	Cleaning sign up on wall in cleaning cupboard for LA staff to use. Clearly showing what chemical and how much to use	Poster on Wall	1
High	Fire evacuation signs to be updated	Update all signage	1
High	Functional fitness area, skirting		

Expired Members By Age



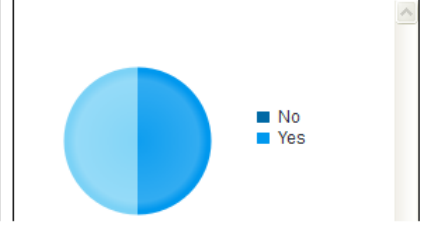
Age Group	Count
00-15	~500
16-24	~800
25-34	~600
35-44	~3500

Live Members Email Validity





Age Group	Count
00-15	~10000
16-24	~25000
25-34	~10000
35-44	~15000
45-54	~10000
55+	~80000
GrandTotal	~40000


Live Members Address Validity



Validity	Count
No	~30000
Yes	~70000





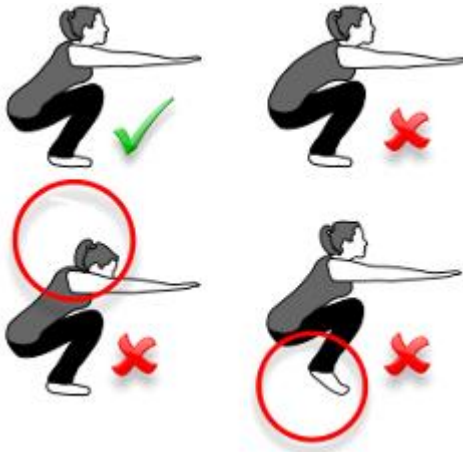


Now we know what's up, what
are we going to

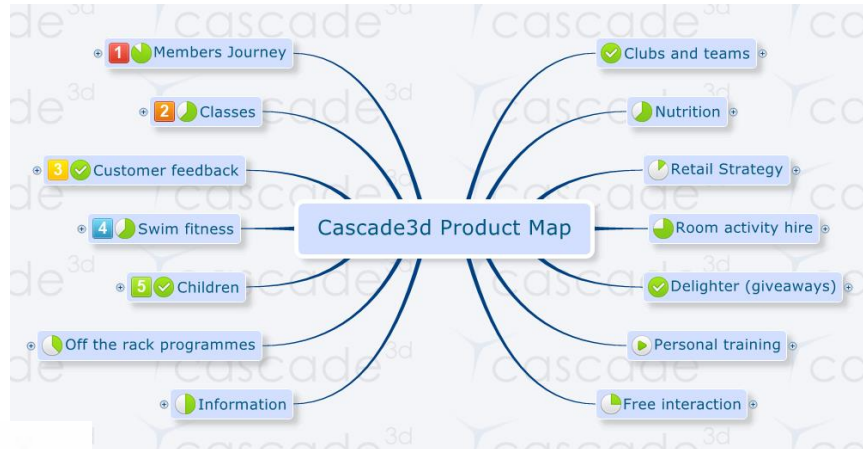
Do

Retention

Do's

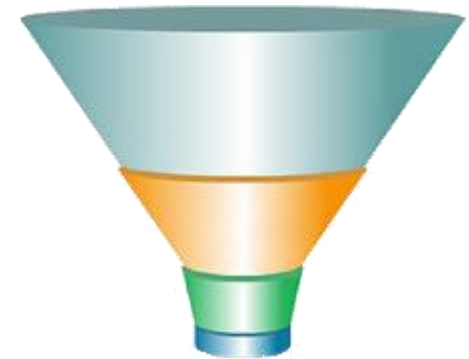


Sales

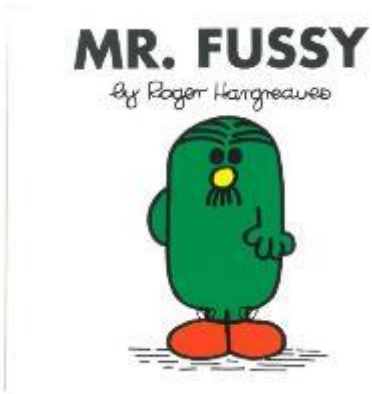
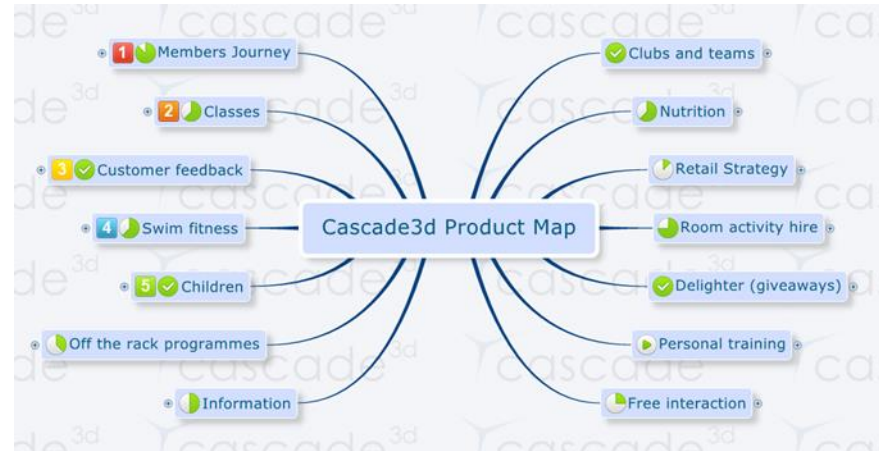


Features and benefits Master document

Area	Features	Benefits
Car park	1. Number of car park spaces, Disabled spaces	1. Secluded, safe, close to the club, easily accessible
Reception	1. As you enter the club, friendly receptionist available at all times 2. Safe barrier so member only	1. Point of contact at all times 2. Quick swipe at barrier so no waiting
Café Bar	1. Good menus 2. Theme nights 3. Special nights (football etc.)	1. Health food energy drinks 2. Good for social events
Pool	1. Aqua classes 2. Comfortable air temperature 3. Warm water 4. Lane-off 5. Ziggis 6. Underwater lighting 7. Swim lessons 8. Viewing gallery 9. Relaxation area 10. Over shoes	1. Varied types of exercise prevents boredom 2. Not too cool for elderly / children 3. Good for joints / comfortable when first get in 4. Prevents having to dodge people when swimming, stops children getting in the way 5. Allows progression in the pool, gets you to do something different, prevents boredom 6. Nice ambient, helps us to check with cleanliness 7. To teach children and adults how to swim and/or improve technique 8. See children on lessons, see if busy 9. Stress relief/ warm environment 10. Our aim is to keep clean



Front of house

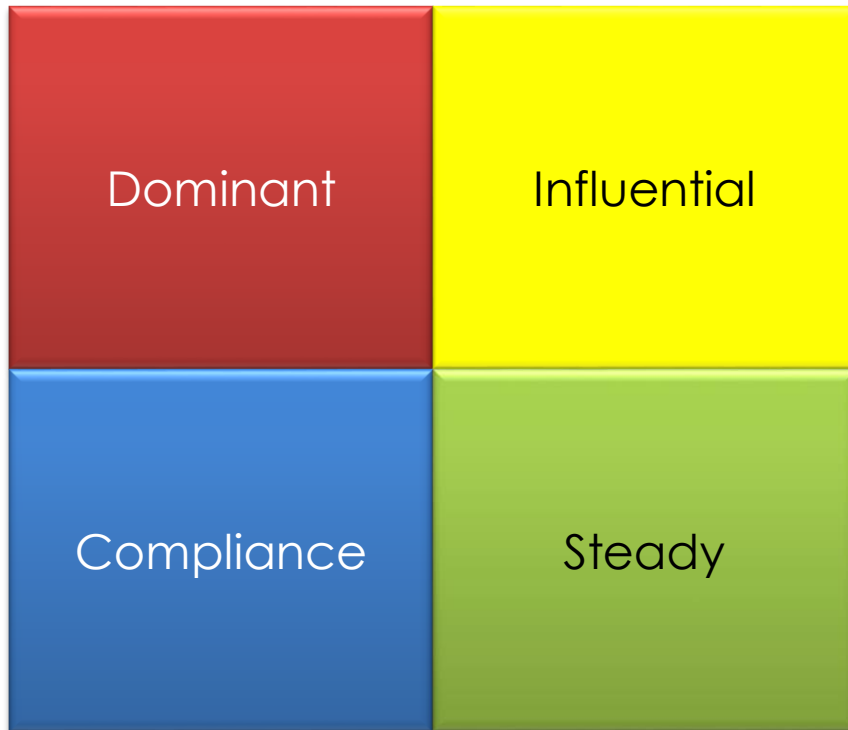


Management

Do's



Do we have the right people doing the right jobs?



Most people will have a preferred personality type, closely followed by a second.

Staff Behaviour

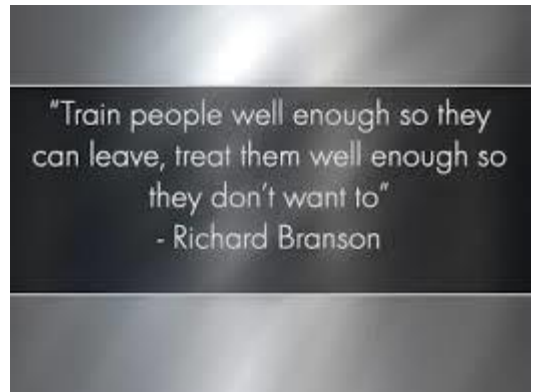
What behaviours could we see in the following environments:

- *Team meetings*
- *Staff issues / Complaints*
- *Types of jobs*
- *Building a sales team*

Now we understand them, what would they be best at?

Summary

One of the frequent arguments against investing in professional development is “What happens if I train my people and they leave?” A better question is “What happens if you *don't* train them and they stay?”



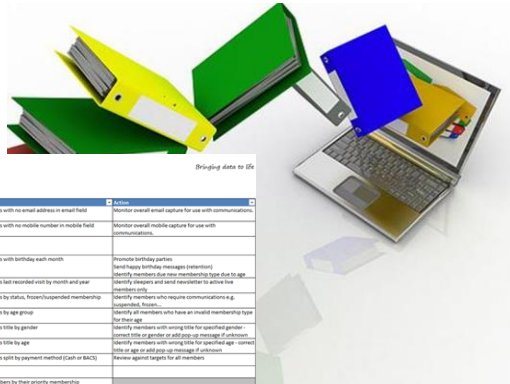


ukactive

Fergus McIntosh

15/04/2015

What have we covered



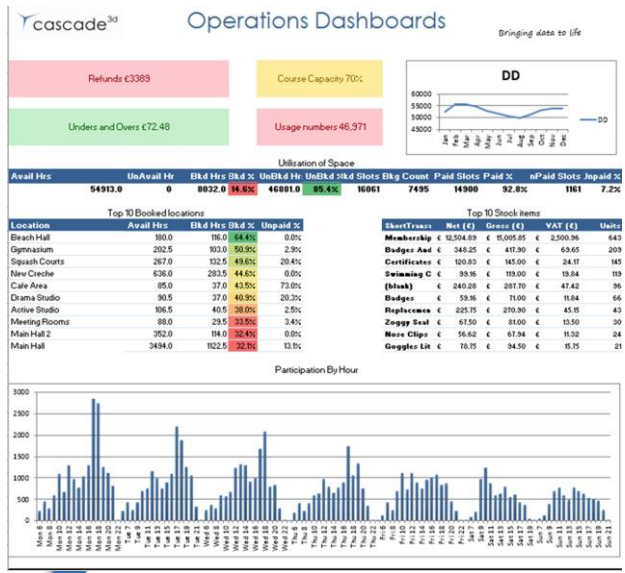
Solutions reports templates

Area of Use	Report Name	Frequency	Day	Report	Objective	Action
Members	Send	Weekly	Thursday	Members with no email address in email list	Monitor overall email capture for use with communications	Monitor overall email capture for use with communications
Members	Mobile	Weekly	Thursday	Use members with no mobile number in mobile list	Monitor overall mobile capture for use with communications	Monitor overall mobile capture for use with communications
Members	PS Renewal	Weekly	Week 4	PS Renewal	Identify members with PS renewal due	Identify members with PS renewal due
Members	Birthdays	Weekly	Week 3	Birthdays	Use members with birthday each month	Provide birthday parties
Members	Last visit	Weekly	Friday	Last visit	Use members last recorded visit by month and year	Identify members due for re-visit and target to active last recorded visit
Members	Status	Weekly	Week 1	Status	Use members by status, frozen/suspended membership	Identify members who require communications e.g. suspended, frozen
Members	Age by membership	Weekly	Thursday	Age by membership	Use members by age group	Identify all members who have an invalid membership type for their age
Members	Title by gender	Weekly	Week 4	Title by gender	Use members title by gender	Identify members with wrong title for specified gender
Members	Title by age	Weekly	Week 3	Title by age	Use members title by age	Identify members with wrong title for specified age - correct title or age or update all members
Members	Payment method	Weekly	Monday	Payment method	Use members split by payment method (cash or BACS)	Review agent targets for all members
Members	Age by gender	Weekly	Monday	Age by gender	Use members	Review agent targets for all members
Members	Member type membership	Weekly	Thursday	Member type membership	Use members by their priority membership	Review agent targets. Use to change sales targets where appropriate
Members	New core memberships	Weekly	Wednesday	New core memberships	Use members by their priority membership for core memberships	Identify new members who have not visited in the last month determine and fix cause
Members	Last visit	Weekly	Thursday	Last visit	Use members last recorded visit by month and year	Identify new members who have not visited in the last month determine and fix cause

Ops Manager Daily, Weekly & Monthly Time Task Planner

Month: _____

Day	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31					
Monday	Week One	Week Two	Week Three	Week Four	Week Five	Comments / Notes																														
Tuesday	Week One	Week Two	Week Three	Week Four	Week Five	Comments / Notes																														
Wednesday	Week One	Week Two	Week Three	Week Four	Week Five	Comments / Notes																														
Thursday	Week One	Week Two	Week Three	Week Four	Week Five	Comments / Notes																														



Ops weekly HOD meeting sheet

Date: _____ Team member: _____

Review of previous meeting action points	Issue	Outcome	Y/N
Who has done what?			
Add spend break down £ and %			
1. Food and drink			
2. Sundry			
3. Sundry			
4. Clothing			
5. Open expense			
Referrals			
Gym			
Reception			
Defectors			
£ & %			
Target vs Actual			
What % claimed back			
Banking			
Overs and unders for the week			
Any trends			
Y/N			
Fifty cash spent for the week and month so far			
Balance			
Health & Safety issues / Audit result and actions			
Members feedback			
1. Comment cards			
2. General enquiries			
Cleaning audit			
Actions			
WDS			
Issues list			
% completed			
Interaction			
Surge analysis			
Week % for uplift			
Number of OCF completed on team			
Studio			
Studio launch / open day			



What one thing will you take away from today?



How Can Cascade help

- *Product Map (Strategy)*
- *Smart Forms*
- *Solutions training day*
- *Dashboards*
- *Automation*
- *Consultancy- Customer Care, Improving interactions or sales training*
- *Communicate product to automate actions*

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