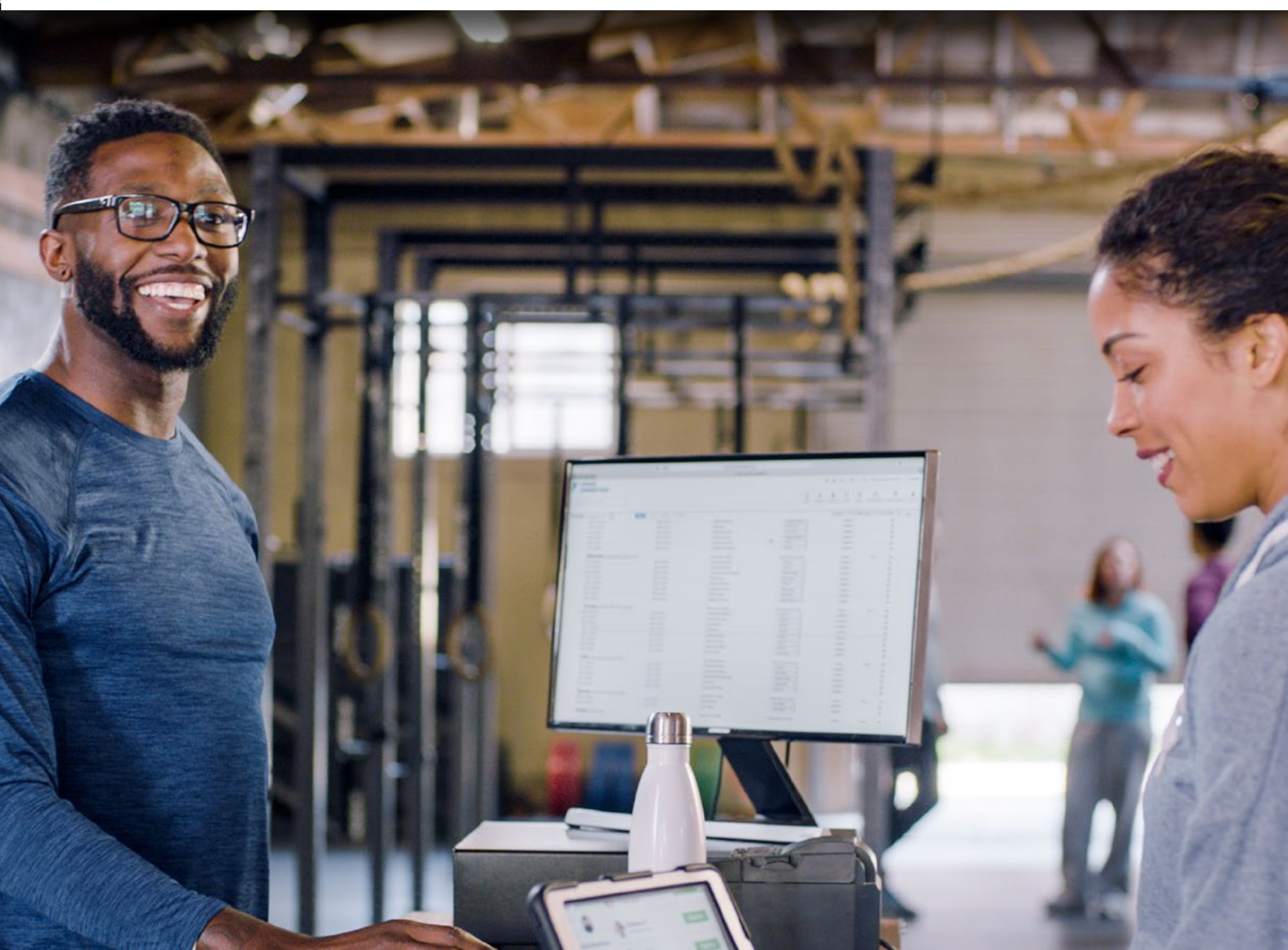
How to Switch Fitness Software



Introduction

So, you're thinking of switching fitness software.

Perhaps your current provider isn't meeting expectations. The software may lack key features you need to run your business, or isn't providing adequate day-to-day support.

Whatever the reason may be, this guide will help you understand what it takes to make a switch.

To start, consider what you want from a new provider.

Are you looking for:

- More efficient operations?
- Stronger marketing capabilities?
- More robust payments?
- Mobile functionality for you, your staff, and your clients?

Your software should provide all the capabilities you need today and as you continue to grow. And while switching providers can be time-consuming at first, the process will benefit your business and clients for years to come. What's the key to success when transitioning to new software? A step-by-step plan.

Let's create yours.

Step 1: Clarify your requirements and reasons for change

The first thing you need to articulate is what specifically is driving you to make a change:

- Are there features and requirements you need that your current software doesn't have?
- What are the must-have features for any software solution to be a good fit for your business?
- Do you need more advanced reporting?
- Are you using multiple platforms rather than an all-in-one solution?

Outline your requirements upfront so you can choose the best software for your specific needs. Once you have them, you'll be able to communicate them to potential new providers—so they can create a comprehensive plan that fits your needs.

- ☐ Membership and autopay billing
- ☐ Staff profiles and permissions
- ☐ Sales commissions, sales reps, etc.
- ☐ Promo offers/discount codes
- ☐ Robust automated marketing features
- ☐ Customized, branded mobile app
- ☐ 2-way SMS notifications
- ☐ Online store
- ☐ Gift cards
- ☐ Advanced/custom reports
- ☐ Waitlists
- ☐ Retail Point-of-Sale
- ☐ Scheduling

Step 2: Determine the resources you'll dedicate to manage the change

Next, decide who will manage the transition. Will it be you as a business owner or will you have a manager responsible?

If your manager is put in charge, it's a good idea to have a contingency plan in case they leave your organization during, or shortly after, the transition. Regardless of who takes point, they should be fully versed in your software and business goals.

If you have multiple locations, you'll still want one person leading the transition to meet deadlines and ensure consistency with converted data. However, it's a good idea to also have representatives from each location to answer specific questions, as needed.

Step 3: Determine your transition timing

When moving to new software, timing is everything. When's the right time for the switch? Consider the following:

- **Do you have a specific go-live date?** If so, you'll need to plan ahead. We recommend allocating between three to six months for the switch.
- **Do you have multiple locations?** If yes, you'll need to account for a longer time frame as each location will need to be transitioned.
- **How many integrations will you need?** Any additional software tools will need to be converted to or replaced by new software.
- **When is your busy season?** You'll want to be up and running several months before this.
- **Who is managing the transition and what is their availability like?** Do they have other business obligations, family obligations, vacations, etc.? Plan accordingly.
- **When is the best time to train your staff on the new software?** Again, take into account staff availability and any big upcoming initiatives at your business.

Why three to six months for a transition? As a MINDBODY customer, you'll first be onboarded to the software. This one-on-one training helps you launch and optimize your software and, on average, takes four to six weeks alone.

As you're getting up to speed on the platform, your data conversion will take place. Timing of the conversion depends on the type of data being imported and how quickly it can be reviewed and verified. Although there's no one-size-fits-all timing, typically you can expect:

- **For a basic conversion**: 3-5 business days from receipt of confirmed data.

  A basic conversion includes client contact info, stored credit card/banking info, account credit and gift card balances, relationships, retail products, and past visit history. This initial import is included with onboarding.

- **For a basic conversion with Remaining Sessions and/or Future Booked Appointments*:** 2-3 weeks from receipt of confirmed data.

  In addition to what's included in a basic conversion, remaining sessions and/or future booked appointments can also be transferred to minimize the need for manual entry of this data.

- **For an Autopay Conversion with Premium Services**:** Generally, 10-12 weeks from receipt of the first complete data set.

  An Autopay Conversion is beneficial for businesses with large membership rosters that wish to bring over large volumes of autopay contracts and reduce the amount of manual data entry required.

**To convert Remaining Sessions and/or Future Booked Appointments requires an additional charge.*

***Premium Services is a paid service for businesses seeking dedicated account management and a premium onboarding experience. Premium Services is required to convert autopays.*

It can be tempting to crunch your timeline and switch as fast as possible—try to resist. Set yourself up for success from the start by dedicating more than enough time and resources upfront to ensure everything is properly converted and set up the first time around. Trust us, your future self will thank you for this.

Step 4: Managing the change

While training on your new software, you'll need to determine how to retrieve all of the data from your existing platform.

Work with your current vendor to decide what form it will be provided to you, how long it will take to be exported, and if you will be charged for the export. These considerations will impact both your timeline and budget.

And while a seamless data transfer is always the ultimate goal, the export capabilities of your current software will be the biggest determinant of what can, and cannot, be transferred to your new software.

Data Migration

When migrating your data, consider what's most essential to keep your daily operations up and running. This likely includes:

- ☐ Client contact information (client names, addresses, phone numbers, emails, birthdates, notes, etc.)
- ☐ Stored credit card/banking information (must be unencrypted data)
- ☐ Account credit balances
- ☐ Gift card balances
- ☐ Retail inventory
- ☐ Past visit history
- ☐ Retail products
- ☐ Remaining sessions
- ☐ Future booked appointments
- ☐ Autopay schedules

Some data, like past sales information, is so integrated with your merchant processor that it will likely be non-transferrable. In this situation, exporting and saving past data will be important, especially for reporting purposes.

If something you need can't be transferred as part of the export, you'll need to figure out how to get the data (run reports), and how to enter it in the new software (usually manually).

Pro Tip: It's a good idea to have a period of overlap with your old and new software, be it two or three months. That way, you can be sure all of your data has been successfully transferred over, without the added stress of a looming contract deadline.

If you're feeling overwhelmed, don't be. Your Data Conversion Specialist will help you navigate what can and can't be transferred, and help you develop a strategy for the smoothest migration possible.

Integrations

Software integrations connect your various business processes, which makes transferring them to your new software vital. Ideally, some of these additional solutions will be replaced by your new software's capabilities. If not, you'll need to determine which can be transferred or exchanged for other options.

Think about the software integrations you use today (if any). This might include:

- Web hosting
- Email/text marketing providers
- Bookkeeping partners

Are you satisfied with their performance? Can each be seamlessly integrated into your new software? If the answer is no to either question, this is the time to look for a replacement. As a MINDBODY customer, our partner solutions will complement your software and help you run, market, and analyze your business.

Functionality

Transitioning software, although a timely process, can be the perfect opportunity for a business refresh. Are there updates or upgrades you'd like to make to your business plan? Are there opportunities your new software makes available that your old software didn't (autopay memberships, for example). Are there pricing changes you'd like to make? Improvements to client relationship management? Client contact information that's missing?

Use this time to evaluate what's working and what can be better—and consider how your new software will support the changes.

Step 5: Training your staff

Just as you'll need to be trained on the new software, your staff will need to be onboarded, too.

Set aside ample time to effectively train your staff before you make the transition so that each member of your team (manager, front-desk staff, instructors/trainers, etc.) is 100% competent and comfortable with the software's capabilities. Depending on the size of your team, this usually takes between two to four weeks to allow for several training sessions and the chance to work in the system.

MINDBODY offers free software certifications to help get your staff up and running from day one.

Step 6: Communicating the change

Now that your team is trained and ready with your new software, it's time to tell the people who matter most: your customers.

Get the word out with signage at your front desk, an email blast, and across your social media platforms. Most importantly, communicate the change *before* the official conversion—the more informed and prepared your customers are, the better.

When developing your communication strategy, include details of how the changes will directly impact them. For example:

- Will you have a new branded mobile app customers will need to download to book classes? Will there be an incentive for doing so (e.g., a retail discount, free branded merchandise)?
- Will you have new methods of communication they should know about (i.e., push notifications, automated confirmation emails and texts, etc.)?
- Will customers have to update contact or payment information?

Check out the sample email copy below to see how you might communicate an upcoming software transition.

To

Subject

Dear Fitness Connection client,

We're thrilled to announce that we're upgrading our software this week! This change will make it easier than ever for you to check out our schedule, book and pay for classes, and so much more. The official conversion will take place next Thursday and Friday, and requires our software to be down during this time.

To prepare for the change, we kindly ask that you:

- *Schedule next week's classes ahead of time (Wednesday at the very latest)*
- *Look out for emails for any class or teacher substitutions and for next steps, post-conversion*
- *Get in touch with our team with any questions*

Send

Pre-conversion:

To

Subject

Dear client,

We did it! We've successfully moved onto our new software —and it's better than ever! We truly appreciate your patience during this transition.

As we move forward, here's what you need to know:

- *[Option 1] We have a new scheduling app. When we say "better than ever", we're not kidding! Download our brand-new app, just for Fitness Connection clients to buy and book classes and appointments instantly.*
- *[Option 2] We have a new scheduling app. When we say "better than ever", we're not kidding! Download the MINDBODY app and search for Fitness Connection to buy and book classes and appointments instantly.*
- *You have a new login. By now, you should have received an email on how to login to the new system. If not, please email or call the studio so we can get this information to you ASAP.*
- *We have a new late-cancel policy. Clients are required to cancel 2 hours before each class without penalty. Late cancels will be charged $10.*

Thank you again for your understanding as we navigate our new software. Please reach out with any questions!

Send

Switching to the right software vendor may be one of the biggest choices you'll make as a growing business.

After making the change, your new fitness software will allow you to better run your business, and help you reach your goals.

To learn if MINDBODY is the right fitness software for you, visit mindbodyonline.com/fitness.

To learn first-hand how MINDBODY can position your business for success, schedule a guided tour today.