Training Methodology:

Using our experience gained while implementing EZFacility in over 2,000 client locations around the world, we have developed phenomenal training processes, strategies, and best practices that if followed, will ensure your long-term success with our solutions.

Train-the-Trainer

The best way to implement EZFacility is to first assign one of your staff members to the role of "Business Champion" or "System Administrator". This person will be the one who will:

1. Watch and participate in training sessions with an EZFacility Success Coach
2. Setup the account (add users, services/products/rates, trainers/venues, etc)
3. Become an expert in how to use EZFacility for all the day-to-day activities currently completed by staff manually, or done in another software system
4. Teach other users how to complete the functions in EZFacility that relate to that person's job role
5. Contact EZFacility Support if they are unsure of how to perform a function
6. Communicate with Management to understand their goals with EZFacility
7. Communicate with EZFacility to figure out how to achieve these goals
8. Communicate with Staff to make sure they understand the goals and how to use the software to achieve those goals
9. Run reports to make sure EZFacility is being utilized properly and to its fullest potential

The person assigned to this role does not have to be the person with the best technical skills in your organization. It is much more important they are able to constantly communicate with everyone, consistently accomplish small goals to show immediate benefits to staff, and of course, have the desire for this position within your organization in the first place.

It is also mandatory for this person to be on all the training calls hosted by EZFacility.

Why Train-the-Trainer?

There are a few reasons that the Train-the-Trainer format works best. While EZFacility Success Coaches understand the needs of businesses in various markets and can tailor the software to them, they do not necessarily know all the nuances that make your business unique. This is where your Business Champion/System Administrator will play a key role. By understanding your goals and relating those to an EZ Success Coach, we will be able to focus each training session on the functions of the software we think will work best. At times there may be a few
options or solutions the Champion will need to choose from. Having multiple end-users involved in this process (many of whom may not want to learn new software) ends up causing confusion with differences in opinions and other issues.

Once the Champion is familiar with the software, they can make a decision on how the end users will utilize it and train them accordingly. This way each EZFacility subscriber has an "In-House EZ Expert" that can be reached if there are any questions regarding proper usage. This is much more efficient and eliminates the possibility of getting instruction on how to utilize the software in a way that is not in-line with the company’s original goals. It also allows your Champion to complete training sessions for new staff that would otherwise be costly if it were done by an EZFacility Success Coach every time.

And finally, having one person in charge of your EZFacility system provides accountability. They will be able to run regular reports to figure out what parts of the solution are being underutilized or being used incorrectly and which users are causing this. The Champion can then report these problems back to users to correct issues or talk to Management if the issue is continual with a particular user(s).

**Hands On**

During the training sessions we will attempt (when time allows) to explain a function, why it is beneficial, perform a function in the time it normally takes to complete during regular use, and then guide the Champion through doing this while they operate the mouse. We will try to do this a few times for greater retention of the material. However, the hands on training provided in the training session with EZFacility, should not at all be considered a substitute for the required practicing after the training (a.k.a. Homework), since this will be where majority of the hands-on experience is obtained.

**Homework**

Expect Homework after Training Sessions!

**Why is homework assigned?**

We assign homework for the same reason schools do - practice makes perfect, and while you'll have some hands on experience during training, it will not be enough to make you an expert on the material covered. If you do the homework (which are usually functions you'll need to do regardless such as putting in your pay rates, etc.) it will allow you to identify which areas you know well, and which sections require greater clarification.
Who should complete the homework?

The Business Champion/System Administrator should complete these first. Because our tools are best implemented in a "Train-the-Trainer" format, the person in charge of learning the software and training others (‘EZFacility Expert’) makes the most sense. When they are ready to train other staff, it’s a good idea for them to give the same type of assignments to your staff as our Success Coaches gave to them in order to ensure the best retention of the material.

When should it be completed?

The best time to complete homework is directly after the training session when the material is still fresh. However, it can be completed at any time prior to the next training session. If Homework isn't completed by the next training session, some of the training topics in future sessions will not make as much sense and may not even be possible to complete. Additionally, you won't have any of the questions you possibly would have gathered while completing your homework.

**Implementation/Training Time Frame**

It is possible to learn a large portion of our software within a few days by reviewing all the training materials found in the EZFacility Community (http://community.ezfacility.com) and spending time entering data and practicing with the software. However, we find that only a very small number of technically inclined users are able to accomplish this.

For the majority of users the following time frame/approach should be expected:

If you complete all parts of the homework assignments, it should take approximately one-month to fully implement the EZFacility software. We have found that spacing out the 4 training sessions over a one-month period gives the system administrator enough time to learn the material covered in the previous session by completing the homework & practicing, training other users, and gathering questions for the next week’s training session making it as effective as possible.

Along with this, there are other time consuming tasks required such as setting up a payment processing solution to integrate with EZFacility, purchasing & installing hardware, importing existing contact data, and planning a successful system launch. Planning a successful launch can sometimes include setting a date to stop using other solutions/software and start using EZFacility, getting all overdue balances into EZFacility, and ensuring clients are notified of any differences in service a software switch may bring.
Because there are many steps involved in a successful implementation, we encourage users to complete the assigned homework so that the 30 day implementation time frame is not extended

**Training Phase Outline**

**Phase 1**

*This phase will cover setting up your account, services & products, and schedulable items, and advanced daily use functions the front desk staff and/or managers will utilize*

Training Methodology and EZFacility Mission Review

**Top Goal Review**

Account Settings Review
- Time Increments (15, 30, 45 minutes)
- Taxes Charged (Tax or Merchandise? For Services?)

Integrated Payments Review (Card Processing/EFT)
Success Best Practices Review (see Success Best Practices)

Administration Training

Location and Trainer Setup

Location details about your facility (address, phone, contact info)
Adding Trainers, Staff & Venues to the system for scheduling purposes

Setting up Pay Rates for your trainers and staff (including hourly and bonus)

**Facility Hours**

How to setup your facility hours for scheduling and staff purposes

**User Administration**

Teach you how to setup new users in the system (please have a list of your trainers and staff in-hand and ready for this section)

Explain role-based security configuration for customized levels of access
Reservation Types

Determine all types of sessions (services) that you sell at your facility (please create this list ahead of time and have it ready for your session) and teach you how to create these sessions.

Package Rates

Show you how to create several packages (including their selling price) in the system based upon your session types, including individual, monthly, post-billing packages (please have all selling prices outline on this list prior to your call as well).

Rental Rates / Billing items

If applicable, add various rental packages and pricing for renting your facilities (courts, fields, rooms, party areas, etc.) to your system configuration.

Show you how to create a rental reservation.

Closing & Homework Assignment

Introduction to Support Center / EZFacility Community

http://community.ezfacility.com/

Client Engagement Introduction

Finally - Schedule your next training session

(Continued)
Phase 2

This phase will cover the rest of the admin and advanced daily use plus ways to monitor system use to make sure it is being used properly. You will also learn the basic daily use functions front desk staff will use.

Roll Call
Integrated Payments Status Follow Up
Homework Review
Training
  Identify/Review Objectives in line with Top Goals
  Recap on Advanced Daily Use Tool Training
  Cover any remaining administration setup
    Client Categories
    Billing Preferences
    Email Blast
    Etc
  Basic Daily use functions
    Enter New Clients
    Log Activities
    Etc
  Homework Assignment
Close Out
  EZ Apps Review
  Client Engagement Review
Schedule Next Training Session

(Continued)
Phase 3

This phase will recap advanced and basic daily use functions. At the end of this session your goal will be to “Go Live” with EZFacility.

Roll Call
Integrated Payments Status Follow Up
Homework Review
Training
  Identify/Review Objectives in line with Top Goals
  Recap Advanced Daily Use Tool Training
  Recap Basic Daily Use functions
  Accountability Report Training
  Homework Assignment
Close Out
  EZ Apps Review
  Client Engagement Review
Schedule Next Training Session

Phase 4

This phase will recap on all sections of EZFacility covered during your training session and cover the “Tips & Tricks” that make EZFacility even easier to use.

Roll Call
Integrated Payments Status Follow Up
Homework Review
Recap on previous training sessions
Training on Tips and Tricks
Client Engagement Focus
Schedule your first Ensuring Success calls

(Continued)
Ensuring Success

After completing your 4 phases of training you will be provided with 2 Ensuring Success calls. Now that you know how to use the system, we will review your usage and make sure you & your team are using the tools in the most efficient ways during these two calls. We can even provide business improvement tips during this session if desired (everything from Saving Time, Saving Money, Increasing Sales, and Creating Happier Customers).

Homework Review
Client Engagement Focus
Business Metrics Improvement (only if desired)
Schedule your second of two Ensuring Success calls