



User Welcome Guide

Welcome to EZFacility! We are excited to begin a rewarding partnership that will meet your management software needs. Our product is designed with the goal of assisting in growing your business and profits upon initial implementation and far into the future.

Training Overview

Training at EZFacility is a comprehensive program aimed at providing a user with the necessary skills and techniques to achieve success when using our software. Throughout the training process you will be paired with one of our specialized trainers, who will work hand in hand to implement the software to fit the particular needs of your business model. Successful and efficient implementation is dependent on users not only completing all training sessions, but taking an active role during those sessions.

Timeline

On average, training is completed over a one-month period. It is recommended that trainings be scheduled weekly during the one month timeframe. Spacing the training appropriately gives new users ample time to learn and practice, as well as develop any follow-up questions for future training phases. Using the one-month timeframe we are able to create a realistic roadmap for users to become proficient within the software, provided all trainings and assigned tasks have been completed. If more training time is needed, it will be provided at no additional cost. Upon the completion of training, each facility will have two ensuring success calls made available to them. These calls can be used upon request and for a variety of reasons that range from a quick refresher on important concepts to an opportunity to troubleshoot with a training representative.

Train-the-Trainer

Our training process is one that has been designed with a "Train-the-Trainer" approach in mind. The Train-the-Trainer methodology will grant every facility the opportunity to have a "go-to" in house EZExpert. This EZExpert could serve as the person responsible for educating current and future employees and answering any questions or concerns that may arise. The person assigned to this role does not have to be overly technical, but must possess an advanced knowledge of the business. This person should be able to communicate and accomplish small goals that demonstrate immediate benefits to staff. The EZExpert should also have a desire for the position.

EZExpert Suggested Qualities

- Knowledgeable on the facility business model
- Effective Communicator
- Ability to convey large concepts to employees
- Desire for the position
- Training Expectations

Training Expectations

Prior to the First Training

The first training serves as a pivotal moment in a facility's time with EZFacility. It is here that key concepts will be shared and the adaptation of our software to a facility's business model will begin. To ensure a seamless transition into the software, preparation and goal setting is important.



In order to make your first training a success, we ask that the following be prepared:

- An assembled list of services the business will offer and their associated prices.
- Any notes taken during the demo
- A clear idea of who the in-house EZExpert (the employee responsible for learning) will be and their activation username and password.
- Having these items will provide a direct framework for merging services and the software.
- Ask Yourself These Questions:
 - Do I know exactly what services I will be offering and what they cost?
 - Do I know who my EZExpert is?
 - If I need to import previous data into EZFacility, do I have the required information?
 - If I am creating a schedule, do I know what resources I would like to include?

Throughout Training

"EZExpert"

Throughout the training process it is essential that the "EZExpert" be given the opportunity to practice using the software and demonstrate the techniques discussed during training. While it is vital for the expert to practice between trainings, it is also important that other employees begin the learning process as well. Having the right people with the right training will ultimately lead to a company's greatest success with EZFacility.

DATA IMPORT

Waiting until the conclusion of training to complete all of the data input necessary to get your facility up and running in thirty days can be challenging. Keeping that in mind, assigned goals will be designated by EZ-Trainers at the conclusion of each phase of training. These goals are assigned with the intention of providing an opportunity for data input and to promote information retention. The timely completion of these assigned goals will keep train-

ing on schedule and ensure that any information needed to progress further in training is placed within the software. Some goals can serve as pre-requisites for future trainings. Also some goals are necessary for the implementation of other portions of the software and additional services (i.e. MemberMe, QuickBooks, Self-Service).

The Conclusion of Training

The prescribed end of training is traditionally marked by the completion of the fourth and final phase. However, it is possible to complete training early; provided a facility and their EZExpert are able to confidently demonstrate core concepts of the software to their trainer and fellow. The end of training should not mark the end of learning with EZFacility. Similar to fitness training, it is essential that a user continue to be a regular user of the software. It is through consistent and meaningful use that he/she will be able to perfect his/her skills and confidently adapt to any changes in business practices or updates to the software.

Importing Information into EZFacility

Importing Overview

In an effort to make the transition into EZFacility as "EZ" as possible, we have a variety of data imports available. Most users opt for our [Basic Contact Import](#) during the initial setup phase. With a Basic Import an excel spreadsheet of client or lead information can be submitted to our engineers for import to an EZFacility account. For facilities that have client information, membership terms, and billing information to submit; we offer an [Advanced Contact Import](#) option. With an Advanced Import a facility can submit an excel spreadsheet that lists current members, their membership terms and any billing information (credit card data). It is important to note that the Advanced Import will not include previous billing history. The final import available is the Point of Sale Import. With a Point of Sale Import



a facility can submit an excel file with all current product information and current inventories.

Please note: The Point of Sale Import template is made available only after the Point of Sale portion of the software has been covered in training.

What Do I Need?

Depending upon the type of import request, a variety of information could be required. Both the Basic and Advanced Imports have a template located in our Support Portal that can be used as a reference. The Point of Sale Import however, is available upon request. It is important to note that requesting an export of data from other software companies can be a lengthy process depending upon the company. Please be sure to contact your current software supplier to gain a clear understanding of their timeline, so that you may plan accordingly.

EZFacility Support

Whether it is prior to training, during training, or after training, as a client of EZFacility there is always support available. Our EZFacility Support Portal has been developed to meet the ever-expanding needs of our diverse clientele, keeping in mind that no two facilities are the same. Some of the most utilized portions of the site include our expansive collection of user guides and frequently asked questions, access to our customer support team and our blog and social media outlets.

User Guides

Our Support Center grants access to our database of over 300 user guides that provide an in-depth exploration into different aspects of the software. Each user guide contains a screen shot outline that includes detailed step-by-step instructions on how to accomplish various tasks within the software. This portion of the Support Center is also where import

templates can be found that are required to have data imported into an account. All user guides have been created with the client in mind and continue to be regularly managed and updated. If you are unable to find a user guide to meet your needs, feel free to contact an EZFacility support team member or trainer for assistance (your inquiry may even be the inspiration for a new user guide).

Customer Support Team

Through the Support Portal our clients have direct access to our customer support team, who are available to assist with any questions or concerns that may arise. Access to the support team is made available to any and all customers beginning the first day they become an EZFacility client. Support is available through the customer support line **1.866.498.3279, Monday—Friday, 9 AM—6:30 PM (EST)**. Have a question during nonbusiness hours? Clients can submit questions, concerns, or requests directly to our Support Team via the Support Portal 24/7 through the Trouble Ticket feature.

Webinars

The Support Portal is where previously recorded webinars can be found, including our popular EZ Essentials webinar series. EZ Essentials is an educational webinar series that showcases feature specific best practices.

Blog

To stay current on debuting new features and industry trends please visit the EZFacility blog.

Social Media

EZFacility plays an active role in supporting and promoting all of its clients across a broad spectrum of social media platforms. Like us on Facebook, follow us on Twitter, LinkedIn and YouTube for software tricks, fitness industry news, member motivation tips and more!