

Administrator Training Template

Printed from Asana

Day 1:

Welcome to Be Yoga:

- Tour of the studio for the Ambassador
 - This includes:
 - where the cleaning supplies are
 - how to do laundry and keep up with it (carmel only)
 - where big trash and recycling bins are (outside)
 - where the food and water is and restocking
 - How to make the mat cleaner

- Tour of the front desk: Where to find everything
 - where the stapler is
 - where the tape is
 - where the cash drawer key is
 - where the mat cleaner/block cleaner formulas are
 - mailbox/toilet paper key etc.
 - what the business cards are and what they are for
 - explain karma cards and membership cards

Customer Service:

- SHADOW Class Check-In (Desk WorkFlow & Customer Service)
 - Front desk work flow: what signing in a class is like: The "10 minute crunch."
 - Ask trainee: What did you see? What did you observe?

- Welcoming a New Student
 - <http://beyogasouth.com/wordpress/studio-administrators/new-students/>

- Creating a New Student account

- How to give a Tour of the Studio to a new student
 - Identify things that students often look for.
 - Make sure that they understand how to navigate offering a tour AND juggling the front desk.
 - Example:
 - water
 - bathrooms
 - where the studio is/which studio their class is in (at Carmel)
 - cubbies - and taking your shoes off
 - changing rooms (showers at Carmel)
 - @ Carmel - treatment rooms
 - leaving purses outside

- Mat Rentals
 - make sure that they know to bring their used mat to the front desk if at Carmel; put in the used mat bin if at Dilworth
 - Mat rentals are free the first time and after that \$3
 - Clean USED rental mats
 - Mat rentals are ALWAYS free for flex/premium members
 - To ring up a mat rental, look under favorite items in retail products

- Happy Students Policy
 - HSP: We have our policies and our students have their reasons that they shouldn't have those policies apply to them. Both of these come second to the client EXPERIENCE. We want them to have a positive experience to leave feeling happy.
 - *Please reach out to business manager for problem solving or accommodations

- What to do when a student comes to class after class starts (Late)
 - ROLE PLAY WITH YOUR TRAINEE/TRAINER
 - If a student comes in after class has started, please instruct them to enter the room quietly and wait until after meditation (after the 'OM') to unroll their mat and place their things. Otherwise they will create a disturbance during meditation.

at Carmel - wait outside door until the OM

How to check voicemail

You must leave the phone in the receiver to listen to the voicemail. Press the blinking red play button and use the speaker function.

Voicemail Protocol

1. Check voicemail
2. If you know how to handle the situation, please give the person a call back
3. If you don't know the answer, or if you aren't able to make contact with that person, please send info an email with the person's name, concern and phone number
4. Erase the message!!

NOTICE:

Voicemail must be on! Check the upper right corner for a red light that reads "Answer On/Off"

Ambassador Resources:

What is/how to use Studio Administrator Page

<http://beyogasouth.com/studio-administrator/>

Who does what

Owner/Studio Director - Wendy Swanson
 Co-Owner/IT - Andrew Diamond
 Director of Operations/IT - Kaitlin Lacey
 Business Manager Carmel - Cindy Bickman
 Business Manager Dilworth- Adrienne Marcellus
 Retail Buyer - Shona Baldoni
 Studio Manager - Grace Millsap
 Outreach Coordinator - Ashley Walker
 Social Media Coordinator - Ashley Nordberg
 Wendy's Assistant/Wellness Center Coordinator - Collette Mason

Day One Notes:

-
-
-
-
-
-
-
-

Day 2:

QUIZ: Day 1 Review

https://docs.google.com/forms/d/e/1FAIpQLSf9hlt9zN3SM2k19Zxs8uOD0MDrdrwqgdv_1acBMarC_V74Q/viewform

Review of opening duties, task list, and staying on task

- Have them do the duties and walk them through it OR maybe trainer can shadow trainee
- Give the space your LOVE!
- *Please* do not surf the web or play on the internet or on your phone. This is not a volunteer job. It is a work/trade.
- If you have completed all tasks on the task list please take a look around the studio and see what can be given love ex. dust cubbies, re-organize retail

Paying for Class:

Does the student have a CC (credit card) saved on their account?

You can tell when the student has a CC (credit card) saved on their account because there will be a green "CC" next to their name on the retail screen

New Student Packages

No discounts on new student packages EVER. [repeat]

They can still buy a new student package up through their first 3 visits. An Intro Series counts as one visit.

If they have only come through ClassPass, they are still considered a new student and can buy a package on their first visit to us NOT through ClassPass

5, 10, 20 Class Packages/ Sharing

Discounts applicable

As many people can share these packages as they want

\$5 discount for early renewal applies

\$8 Classes and Reassigning Payments

This is a two-step process:

1. Buy the drop-in \$8 class or the 7 class pass

2. Then sign them into the class, and MBO will automatically choose the \$8 pass

3. If they were already signed in and had a full price pass on their account, you'll have to switch the payment method, by pressing the Change button next to their payment on the class sign in sheet

Encourage people with a class pass to purchase a 7 class pass instead of a drop in to save them money and prevent mistakes

No Discounts - classes are already discounted (no \$5 discount on early renewal)

Student/Senior Pricing Options

5 class pass, one month unlimited, membership

no sharing packages

no discounts (except \$5 off early renewal)

Memberships

Membership info sheet and FAQs https://docs.google.com/a/beyogaclt.com/document/d/1bg8jvkK_ENUJ1eZtU27OOEmZ_axk5u4Zs-Dq-va7iWU/edit

Number of practices

<https://docs.google.com/a/beyogaclt.com/document/d/1nymF55HOsT3KAmWu3PmhlUxSXYJ8dDnQ0ffdbim-Gptg/edit>

Save the client's credit card on file at the bottom of the profile page. Email info@beyogaclt.com with the student's name, preferred draft date, membership type, and email address. Hand the student a membership card.

When a student purchases a membership, check their profile to see if they have any price sharing relationships in their profile, and if so, REMOVE them.

\$5 off for early renewal

If they purchase a pass before their old one is used up, they get \$5 off. Even if they are using their last class on that day and they have 0 remaining. This does not apply to memberships.

Selling: "Hey, I see you only have 1 more class on your pass. If you renew today, you'll save \$5."

If you forget the early renewal discount, and they didn't mention it, then don't worry about it.

Misc:

Extending the expiration of a class pass

If a student wants an extension of the expiration of their class package, our policy is that we will extend their pass by one month if they buy another full price 5, 10, or 20 pass OR student/senior package (not 7 classes for \$49)

Please sell them a new pass and email info@beyogaclt.com explaining the situation. Someone from management will extend their old pass.

One month unlimited (or other unlimited packages) are non-negotiable in most circumstances. Please email info and let the person know that one of the managers will reach out to them regarding their issues.

Key Fobs

In the client's profile, under the name, Assign ID, and enter the key fob either by scanning, or typing in the number.

Package Sharing: Which passes and how to put it in the system

The following packages can be shared:

5, 10, 20 regular class pass only.

PROFILE>RELATIONSHIP>ASSIGN>SHARES PRICING OPTION

Once the shares pricing option is in the profile, it will remain there resulting in that person continuing to share their class pass. If someone only wants to share their class pass as a one time courtesy, be sure to REMOVE the shares pricing option once you've completed the transaction.

Day 2 Notes:

-
-
-
-
-
-
-
-
-

Day 3:

QUIZ: Day 2 review

<https://docs.google.com/forms/d/1oYVOETT19oNfaVKPcwXqCvTaqigKWTzngTdHcJaJ4/viewform>

Review on Discounts

No special persons discounts (i.e., RYT, do-gooders and protectors) on any class or pass EXCEPT: regular \$16 drop in; regularly priced 5, 10, 20 class passes; regular 1 month unlimited (\$140)

\$5 early renewal discount does apply to students/seniors as well as regular 5, 10 or 20 class passes.

PREMIUM Members get 20% off all merchandise

NO STAFF OR MEMBER DISCOUNT ON ARTISAN CONSIGNMENT

Retail Screen:

Account balances

Please note when you see a balance on someone's account at checkout.

- If it's a positive balance (black), you can ask if they would like to pay with that, or split the payment if it's not enough to cover their whole purchase.

- If it's a negative balance (red), please say something like "I see you have a negative balance on your account, would you like me to add that to your purchase today?"

- If they have questions about the balance you can look up more info at the bottom of the Account Details page. Note that very large negative balances are usually for teacher training, and we likely already have payment plans for them.

To find out why they have a negative balance on their account, go to PURCHASES and look for "account" under payment type.

Early Bird Classes

To ring up an early bird class, go to Services and then choose the \$8 Early Bird class from the drop down menu. Choose the \$8 Early Bird class. Be sure to ask the student if they are interested in purchasing the 7 classes for \$49 pass if they are attending Early Bird classes often.

Checking in Workshops

Go to Workshops tab, select your workshop, and click on the sign in sheet or the roster. If roster, click the date and that will bring you to the sign in sheet.

Next to the client's name, select Buy, and it will default to the the correct payment type.

Otherwise select Workshops as the service type in the drop down menu on the retail screen and select the desired workshop.

Memberships under the retail screen (different than unlimited yoga memberships)

Under services in the retail screen, in the Memberships category, you'll find the type of memberships that place a colored dot next to someone's name. These create discounts, but do not pay for services. (Examples: Charlotte Roller Girls, Be Yoga Staff (blue dots), Registered Yoga Teacher discount, and others).

** To ring up: Retail > Services- choose membership > Item name- choose appropriate option > click "add item" > for payment method choose "comp/guest" = once completed the student will now have their discount applied to all services from this point on

If a client asks about these, now you know to ring them up from there. Once they have the dot next to their name, the corresponding discounts will automatically be applied.

Be Good

Be Yoga's karma program, Be Good supports 6 charities each year, for two months each. Please take a look at our current karma partner: <http://beyogasouth.com/wordpress/be-good-karma-yoga/>

To ring up a donation, go to the retail screen, under services choose Be Good as the service type and choose a donation amount. Proceed as usual.

Payments/Gift Cards section of MBO

To receive a gift card (similar process for Spa Finder), click in the box on the upper left that says: Assign Gift Card, and scan the gift card bar code. This will put the money on their account. Ring up the purchase, use account to pay, and throw the gift card out. Any remaining balance will be on their account.

Also review how to sell a gift card.

Contracts section of MBO

Manager Use Only!!

Retail - how to do in MBO and overview of different products we sell

Go over products section and role play with scanning barcode

Branded apparel: Our very own Elizabeth Dickinson and Ashley Walker design our Be Yoga clothing using a local print shop by the name of Mom and Pop.

Mats: We offer manduka mats that have a lifetime warranty!

The Pro is the thickest mat, and longer in length. It provides the most amount of cushion and support.

The Pro lite is slightly smaller and thinner in density- great for travel.

Retail clothing: We offer carefully selected brands that use mindful and earth friendly practices. Apparel is selected for both comfort and style. With an emphasis on goods made in the USA.

Handmade goods: We offer many artisan products in the studio from jewelry to scarves. We do not offer staff or member discounts to our artisan consignment.

How to share a full priced pass with more than one student

https://docs.google.com/a/beyogaclt.com/document/d/1UDMOIVmyBGj9rBn_233MJbgHDoFcdVqS5CLP6bMBQNO/edit

selling Gift Cards, assigning gift cards and throwing them away

gift cards cannot be reused and should be discarded upon redeeming.

SELLING GIFT CARD: <https://docs.google.com/a/beyogaclt.com/document/d/1s2OXKbKF-kac1TllhcE0ORrISj4Ue7pl-E0RSY1-Tcl/edit>

ASSIGNING GIFT CARD:

Multiple Forms Of Payments

<https://docs.google.com/a/beyogaclt.com/document/d/1v1h37WgYY2sfA2eeWK8VJa0PBM72Y7rPpBBt4tTM6ul/edit>

Funny Icon: two people

means that someone else is paying for that person. CLICK ON THE ICON to find out more information.

BE AWARE: if a person has a membership AND a two people icon or audition classes, or something else that can't be shared, this needs to be corrected by removing the shares pricing relationship in that person's profile

How to request a sub

Please request of at least two week in advance.

Email ONLY your home studio:

CARMEL - carmelfrontdesk@beyogaclt.com

DILWORTH - frontdesk@beyogaclt.com

For last minute requests, please call ambassadors to get someone to cover your shift, and be sure to contact your Business Manager by phone or text so they know.

Ambassador Directory. Save this link.

<https://docs.google.com/spreadsheets/d/1hkTriUvqpuhszTTyniNwwKDKOLUmjWip4aq9sl4vvAE/edit#gid=4>

Difference between teachers' significant others and package sharing

DON'T SET UP PACKAGE SHARING RELATIONSHIP

For a boyfriend/husband/girlfriend etc coming to take their teacher's class, purchase a "FREE - teacher SO taking their class ONLY"

Day 3 Notes:

-
-
-
-
-
-
-
-

Day 4/ Observation:

- QUIZ: summary and recap
<https://docs.google.com/forms/d/1ZUOZA5qcGcHLOUP4OR7Mlw-dqil71qeJSH-k87nb62g/viewform>

Recap:

- Memberships
- Retail - different mats, different brands, specifics
- How to address things that you don't know how to handle - when to email your Biz Manager
What management handles, how to create a "always happy" environment.
- Day 4/other notes:

-
-
-
-
-
-
-
-