



ClubAutomation

Knowledge is power.

STRATEGICALLY TRAIN YOUR STAFF

Streamline your operations and reach your goals by educating your staff on how to use Club Automation to its full potential.

VIRTUAL TRAINING SOLUTIONS

Ensure your existing, returning, and new staff are up to date on Club Automation training and best practices. Our Virtual Training Packages are one-on-one training sessions with a Club Automation product expert. Select course topics that are either frontline or configuration focused from the course catalog at the end of this document, and a product expert will use your Club Automation site to deliver detailed training sessions based on commonly occurring situations at your club.

BASIC VIRTUAL TRAINING PACKAGE (Option 1):

Buy 2, Get 1 Free
\$500

DELUXE VIRTUAL TRAINING PACKAGE (Option 2):

Buy 3, Get 2 Free
\$800



Contact us at trainingpackage@clubautomation.com!

VIRTUAL TRAINING PACKAGES

Based on your selected package, you will choose a number of training topics from our course catalog (next page). You will then meet with our team for a scoping call, where we will discuss your training goals in depth with you. Once your training sessions are scheduled, a product expert will provide the training sessions using your Club Automation website. These training sessions:

- **Are Remote via Zoom**
 - This allows for flexible scheduling for you and your staff!
- **Can be Attended by the Staff Members of Your Choice**
 - Just forward the Zoom link to anyone that you would like to attend.
 - Choose from frontline staff focused sessions or configuration training sessions.
- **Use Your Club Automation Website**
 - The Software Trainer leads scenario-based training sessions in your site so your team is up to speed on how to complete their daily responsibilities in Club Automation.
- **Use the Principles of Adult Learning Theory to Train Your Staff**
 - We combine presentations, hands-on practice, and open dialogue to engage participants.
- **Vary in Length from 45 to 90 Minutes**
 - Check the course catalog on the following page to learn more about each type of session!
- **Must be Used Within 90 Days of Purchase**
 - We will work with you to ensure that a Software Trainer is available to train you within the 90 days!

YOUR SUCCESS IS OUR PRIORITY.

**Empower your employees to run your facility effortlessly
and more efficiently.**



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VIRTUAL TRAINING COURSE CATALOG

Session/Topic	Description	Suggested Participants	Prerequisite	Session Time
Club Automation 101: The Essentials	Learn to navigate Club Automation as a front-end staff user through a basic orientation. Review how to log in, the home screen and navigation tools, profiles, schedules, and point of sale.	New staff or those that need a basic review of our platform.	None	90 minutes
Café Module and Kitchen Display Screen	Understand how to utilize Club Automation for a café's needs through a review of a café point of sale, order customization, and an orientation of the Kitchen Display Screen.	Café managers, cashiers, and/or staff interacting with made-to-order food.	Club Automation 101: The Essentials	60 minutes
Childcare Module	Learn how to operate and manage the Childcare module through a review of childcare billing, authorized guardianship, dropping off and picking up children, and a review of the point of sale.	Childcare staff members, Childcare Directors, and/or staff that interact with childcare at the facility.	Club Automation 101: The Essentials	45 minutes
Communication Center and SMS Messaging	Complete an overview of Club Automation's Communication Center by learning how to send emails, pull mailing lists through both reports and event rosters, and how to use your SMS platform to its full functionality.	Marketing Managers, Membership Sales Directors and staff, and service providers.	Club Automation 101: The Essentials	60 minutes
Front Desk Staff Overview: Basics of Profile, Schedule, and Point of Sale	Understand and practice Club Automation processes necessary to operating a facility front desk through an orientation of the member profile, service schedule(s), and the point of sale.	New front-end staff members, Front Desk staff, Member Services staff, and/or any user operating a front desk station.	None	90 minutes
Managerial Reporting	Manage and process information needed to oversee facility operations through a review of key reports and how to run them; understand how to utilize key reports to bolster	General Managers, Controllers, Department Heads, and/or other general facility administrators	Club Automation 101: The Essentials	90 minutes

marketing, the financial process, and general operations.

Membership Sales Staff Overview: Basics of User Groups and Membership Sales/Changes	<p>Understand the nerve center of User Groups within Club Automation by learning the definition of a user group, reviewing how to sell and edit memberships, and how to make membership upgrades/downgrades.</p>	<p>Membership Sales Directors and staff, managers, and/or any staff that adjust or interact with membership management.</p>	<p>Club Automation 101: The Essentials</p>	<p>90 minutes</p>
Packages Overview	<p>Gain a greater understanding of how Club Automation logic processes packages by defining what a package is and reviewing the life-cycle of a package – along with basic package troubleshooting tips.</p>	<p>Service providers, front desk staff, department heads, managers, and/or any staff that interact with packages in a service’s schedule.</p>	<p>Club Automation 101: The Essentials</p>	<p>60 minutes</p>
Payroll Overview	<p>Understand how to review and read a specific staff member’s payroll via the Staff Info tab, and how Club Automation generates payroll via the schedule and time clock.</p>	<p>Service providers, hourly staff, managers, controllers, and/or any staff that tracks his or her payroll in Club Automation.</p>	<p>Club Automation 101: The Essentials</p>	<p>45 minutes</p>
Pro Shop Module and Inventory Overview	<p>Learn how to operate and update the Pro Shop module to most efficiently sell and track items for sale at a facility – includes basic inventory introduction.</p>	<p>Pro Shop managers and staff, administrators, and/or any staff that interact with the Pro Shop module.</p>	<p>Club Automation 101: The Essentials</p>	<p>60 minutes</p>
Provider Staff Overview: Basics of Service Schedules, Events, Point of Sale, and Rosters	<p>Understand and practice Club Automation processes necessary for service providers through a review of the user profile, a detailed look at the service schedule(s) and packages, and a basic review of the point of sale.</p>	<p>Service providers (i.e. personal trainers, tennis instructors, etc.), department heads, and/or any staff interacting with facility events.</p>	<p>Club Automation 101: The Essentials</p>	<p>90 minutes</p>

Events – Programs	Learn how to utilize Club Automation’s program module to manage session-based class schedules, registration, reporting, instructor management and attendance management. After this session, you will need to complete your program build out in Club Automation.	Department Heads	None	90 minutes
Events – Group Activities	Learn how to utilize Club Automation’s group activity module to manage drop-in and group exercise class schedules, registrations, reporting, instructor management and attendance management. After this session, you will need to complete your group activity build out in Club Automation.	Department Heads	None	90 minutes
Events – Camp	Learn how to utilize Club Automation’s camp module to manage week-long camp schedules, registrations, reporting, instructor management and attendance management. After this session, you will need to complete your camp build out in Club Automation.	Department Heads	None	90 minutes
Membership Prospecting Module	Learn how Club Automation’s membership prospecting module can assist your membership sales staff in tracking prospects and creating follow-up tasks as well as how you can report on prospects and prospecting tasks.	Membership Sales Directors	None	60 minutes
Corporate Accounts	Understand how you can leverage corporate accounts to automate membership discounts and routing of membership dues for members of a corporation or organization. After this session, you will need to complete your corporate account and billing rule build out.	Membership Sales Directors, Billing Managers	None	60 minutes