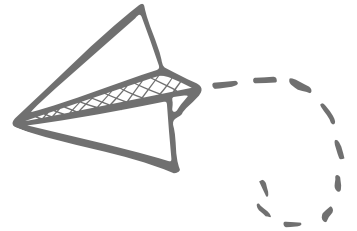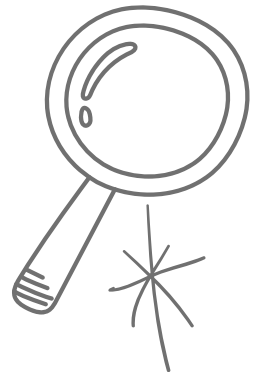# Pike13

TRIAL SITE WORKBOOK

This workbook will guide you through setting up your Pike13 account and optimizing client management. You'll find exercises and checklists to define your client journey, organize your services, and leverage Pike13's features effectively. Let's get started!

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UNCOVERING YOUR BUSINESS PAIN POINTS

Take a moment to reflect on the key areas in your business where you encounter challenges. Use the prompts below to help identify your top pain points. You can also write any specific examples that come to mind.

Business Area	Pain Point/Challenge	Specific Example
Scheduling & Bookings	(e.g., hard to manage bookings)	
Client Management	(e.g., tracking client progress manually)	
Reporting	(e.g., data is hard to compile)	
Payments & Invoicing	(e.g., invoicing errors)	
Staff Coordination	(e.g., shift scheduling is confusing)	
Other		

TOP 3 PAIN POINTS

1 _____

2 _____

3 _____

DEFINING YOUR SERVICES

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In this activity, you'll define the key details of your services to set them up in Pike13. This table will help you get organized by specifying essential information about each service you offer. Use the table below to list your services, filling in the columns with relevant details.

OBJECTIVE

To create a clear list of services that your business offers and understand how they will be managed within Pike13, and identify the ones you should add during your trial period.

Service Name	Single Visit Price	Duration	Capacity	Frequency	Waitlist	Location	Instructor	Added to Trial Site?
Rock Band Jam Session	$50	120 Min	32	Weekly	Yes	Main	Stan	

You've now outlined the essential details needed to set up your services in Pike13. With this information, you're ready to start managing your offerings, enroll clients, and make the most of your trial experience.
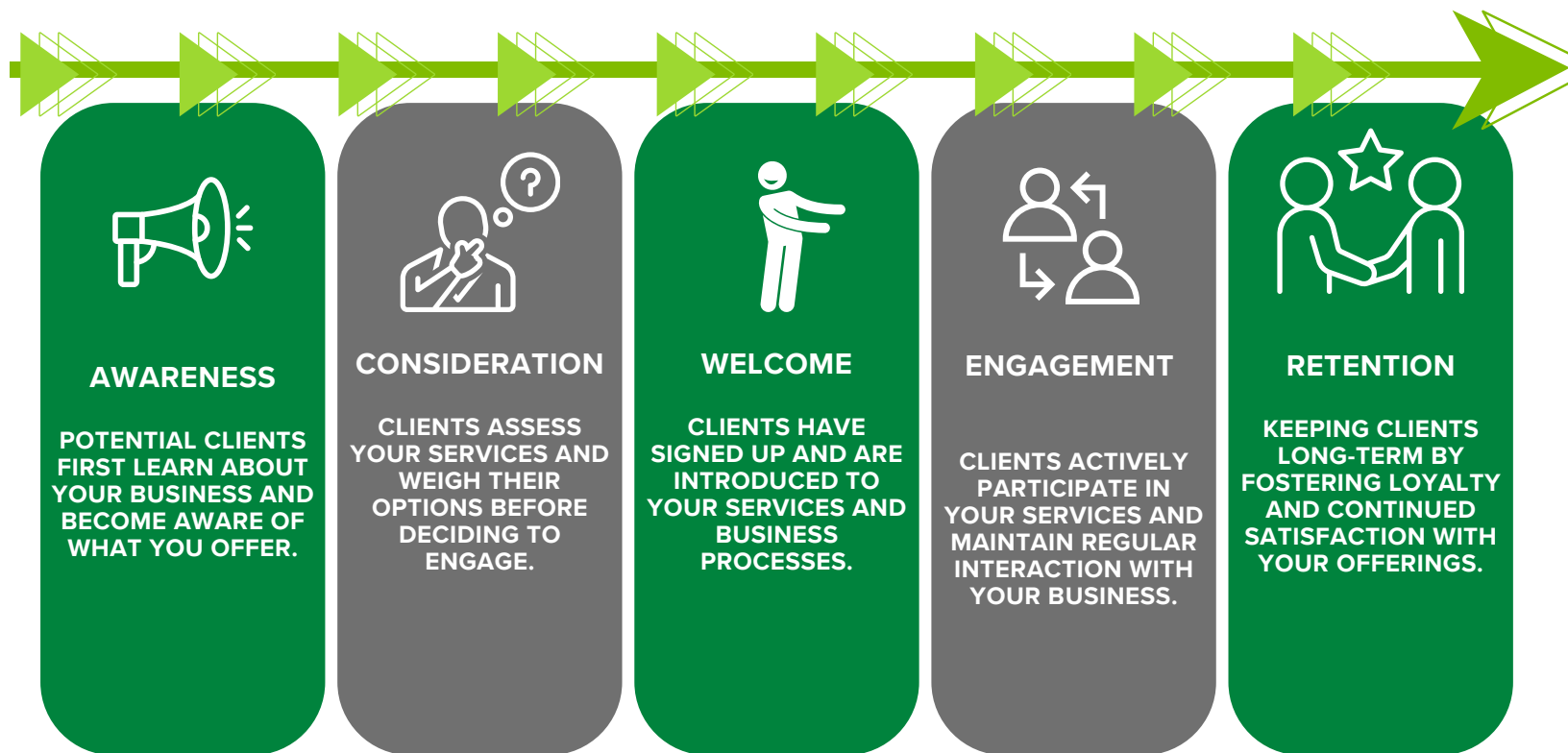
INSTRUCTIONS

- Service Name: Enter the name of the service (e.g., Private Training, Group Yoga Class).
- Single Visit Price: Provide the price for a single visit/session of the service.
- Duration: Specify how long each service session lasts (e.g., 30 minutes, 1 hour).
- Capacity: Indicate the maximum number of participants for group services, or enter "1" for individual services.
- Frequency: Specify how often this service is offered (e.g., daily, weekly, by appointment).
- Waitlist Option?: Mark whether a waitlist option is available for this service (Yes/No).
- Location: Add the location (physical or virtual) where the service takes place.
- Instructor: Add who teaches the services
- Have you added this to your trial site?

UNDERSTANDING YOUR CLIENT JOURNEY

This exercise will guide you through the client journey, helping you use Pike13 to deliver value, streamline processes, and foster client growth and loyalty.

BREAKDOWN OF CLIENT JOURNEY

AWARENESS

POTENTIAL CLIENTS FIRST LEARN ABOUT YOUR BUSINESS AND BECOME AWARE OF WHAT YOU OFFER.

CONSIDERATION

CLIENTS ASSESS YOUR SERVICES AND WEIGH THEIR OPTIONS BEFORE DECIDING TO ENGAGE.

WELCOME

CLIENTS HAVE SIGNED UP AND ARE INTRODUCED TO YOUR SERVICES AND BUSINESS PROCESSES.

ENGAGEMENT

CLIENTS ACTIVELY PARTICIPATE IN YOUR SERVICES AND MAINTAIN REGULAR INTERACTION WITH YOUR BUSINESS.

RETENTION

KEEPING CLIENTS LONG-TERM BY FOSTERING LOYALTY AND CONTINUED SATISFACTION WITH YOUR OFFERINGS.

Your client's experience is shaped by every interaction, from discovering your services to becoming a loyal customer. Understanding this journey is key to creating a seamless experience at each step. Pike13 helps you enhance this journey, from managing operations to improving how you attract, engage, and retain clients.

By considering each stage, you can fully leverage Pike13's tools—whether it's organizing services, automating communications, or tracking engagement.
This exercise will guide you through the client journey, helping you use Pike13 to deliver value, streamline processes, and foster client growth and loyalty.

CLIENT JOURNEY STAGES

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For each stage of the client journey, answer the questions in the second column based on how your business currently handles these areas. In the third column, you'll find suggestions for how Pike13 can assist with each stage. As you work through the exercise, consider how Pike13's tools can help you streamline processes, improve client engagement, and enhance your overall

AWARENESS

Question	Your Answers	How Pike13 Can Assist
How do potential clients discover your business?		Pike13 offers marketing tools to enhance your visibility.
How does your website facilitate direct bookings for potential clients?		Use Pike13's widgets and marketing website features for seamless bookings.
Have you considered offering a complimentary pass for new clients?		Pike13 provides complimentary passes to attract new clients.

CONSIDERATION

Question	Your Answers	How Pike13 Can Assist
How do you present your services and offerings to potential clients?		Pike13 allows you to create clear and organized service categories.
What information do clients need to know to make a decision?		Include essential service details in your client-facing website via Pike13.
What details do you include in your client sign-up process?		Customize the sign-up form in Pike13 to gather relevant information.

CLIENT JOURNEY STAGES

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WELCOME

Question	Your Answers	How Pike13 Can Assist
What information do you provide new clients to help them get started?		Pike13 allows you to send welcome emails with essential info.
How do you communicate important notifications or updates to new clients?		Pike13's notifications system can keep clients informed.
What special instructions or guidelines do you need to provide?		Pike13 allows for waivers, documents, and special instructions for your clients.

ENGAGEMENT

Question	Your Answers	How Pike13 Can Assist
What recurring plans or memberships can I offer to keep clients engaged?		Pike13 allows you to set up recurring plans that encourage regular attendance and consistent revenue.
Which integrations can I leverage to enhance client interaction?		Integrate with tools like Mailchimp or Emma for personalized email campaigns, keeping clients informed and engaged.
How can I track client engagement and attendance patterns?		Utilize Pike13's reporting tools to analyze attendance trends and identify clients who may need additional outreach.

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RETENTION

Question	Your Answers	How Pike13 Can Assist
What metrics should I track to evaluate client retention?		Pike13 offers detailed reporting on client attendance and conversion rates, helping you identify trends.
How can I identify clients who are at risk of disengagement?		Use reporting tools to flag clients with declining attendance or engagement, enabling proactive outreach.
How can I encourage referrals from satisfied clients?		Implement a referral program through Pike13's coupons that can offer referrals for new members.

ADDITIONAL NOTES

_____

_____

_____

_____

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_____

_____

By mapping out each stage, you've gained a clearer picture of how your clients interact with your business and how to optimize those touchpoints. With Pike13's features in place, you can create a more streamlined, engaging experience that encourages clients to keep coming back.

CUSTOMIZING YOUR SIGN UP

In this activity, you'll think through what additional information you want to collect from your clients and Staff during the sign-up process. Use the text boxes below to list the details you'll need beyond the standard fields (Name, Address, Phone Number, Birthday, Email). Additional fields might include:

- Emergency Contact Information
- Health or Medical Conditions
- Referral Source (How did they hear about you?)
- Client Goals or Preferences (e.g., fitness goals, skill levels)

WHAT ADDITIONAL INFORMATION DO YOU NEED?

HOW ABOUT STAFF

WHAT ABOUT FOR DEPENDENTS?

SOFTWARE COMPARISON

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This software comparison table will help you evaluate how your current system stacks up against Pike13. By comparing key features like pricing, automation tools, and client management options, you can see where your current software may fall short. Use this table to determine if switching to Pike13 can improve your business operations and streamline your workflows.
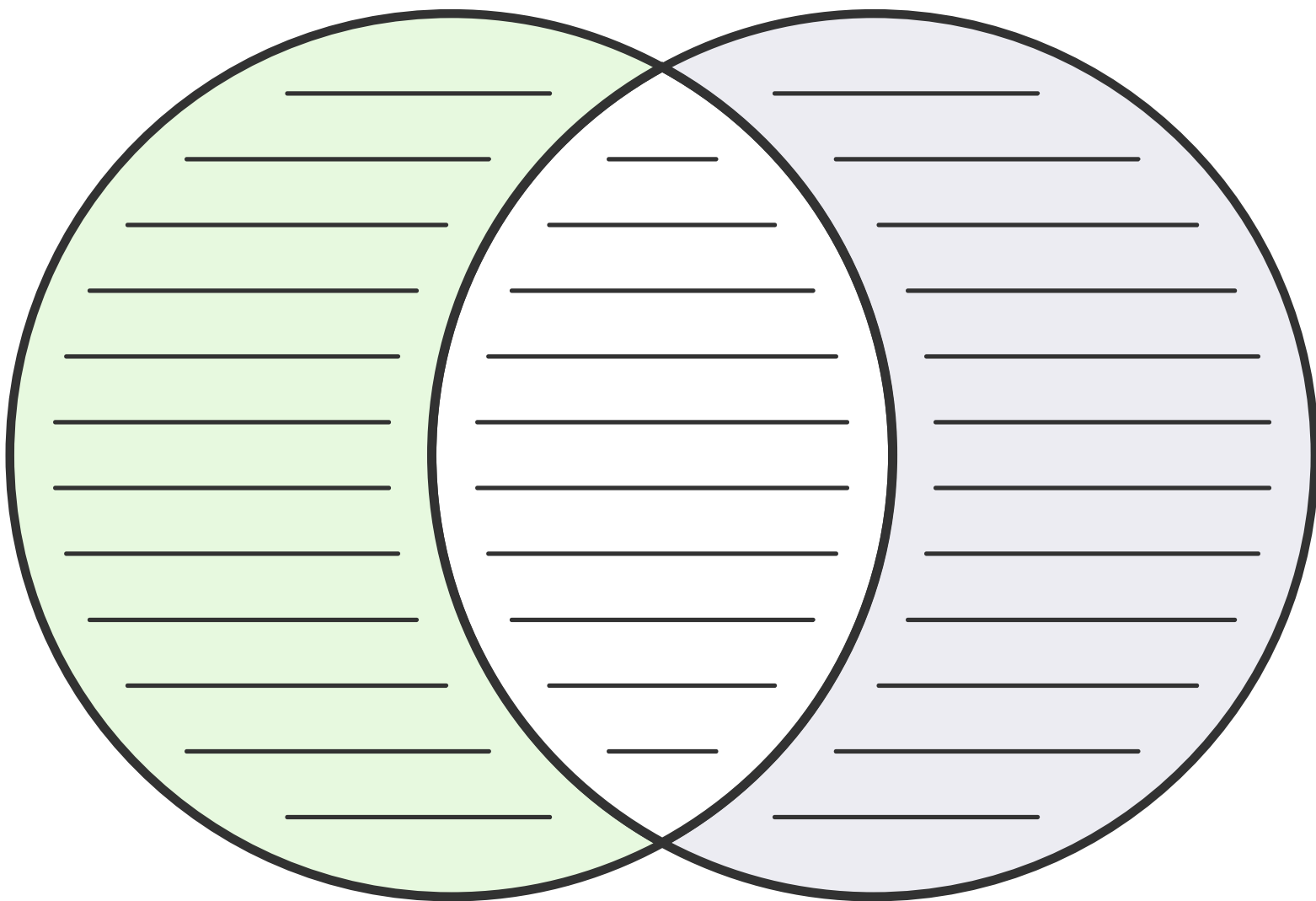
Features/Criteria	Pike13	My Pike13 Trial Notes	Current System
Client & Staff Management	Automated client tracking, customizable staff schedules, easy access to profiles and reports.		
Class & Course Scheduling	Intuitive scheduling system, supports recurring classes and multi-location operations.		
Payment Processing	Payment processing, automated and recurring invoicing, secure transactions.		
Reports & Analytics	Customizable reports for financials, clients, staff performance, etc.		
Mobile Access	Full mobile functionality through apps and branded app options.		
Support & Resources	Knowledge Base, Help Center, and Onboarding team offer personalized support, with the Customer Care team available to assist after onboarding.		
Cost & Value	Transparent pricing tiers based on business size and needs.		
Customization Options	Highly customizable to fit business needs, easy integration with tools like Zapier.		
Scalability	Designed to scale with business growth, supports franchises and multi-locations.		

IDENTIFYING GAPS IN YOUR BUSINESS

In this activity, you'll use the Venn diagram to identify areas where your business could improve and how Pike13 can help.

In the first circle, list pain points in your current system from the earlier activity. In the second circle, write your favorite Pike13 features. In the overlap, note which Pike13 features may help solve those issues.

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Congratulations on completing the trial workbook!
You've taken important steps toward optimizing your business operations with Pike13. Whether it's setting up services, refining your client sign-up process, or comparing software, you're now equipped to make informed decisions. We hope this experience has shown you how Pike13 can simplify your management tasks and enhance client satisfaction.

If you're ready to move forward or need any additional support, we're here to help!

Best Regards,

Pike13 Sales Team