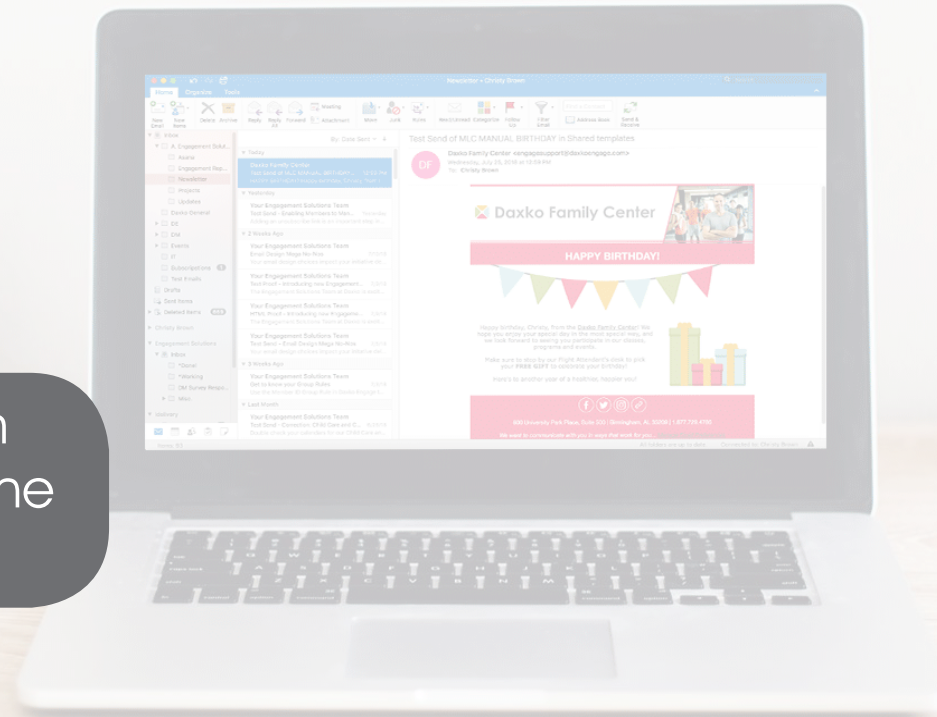


DISCOVERY SURVEY

The purpose of this survey is to gather information so that the Engagement Solutions Team can build emails, text messages, and task campaigns for your organization. Information gathered will be used as it is provided. Please be sure that information is accurate.

Use the navigation bar to skip through the document.



CONTENT

1	HOME	7	MEMBER LOYALTY: NPS
2	MEMBER LIFECYCLE CAMPAIGN OVERVIEW	8	ANNIVERSARY
3	GENERAL	9	BIRTHDAY
4	MEMBER PROSPECTING	10	PAYMENT INFORMATION RENEWAL (if applicable)
5	NEW MEMBER ENGAGEMENT	11	PROACTIVE MEMBER RENEWAL
6	MEMBER LOYALTY	12	MEMBER RECOVERY

MEMBER LIFECYCLE CAMPAIGNS OVERVIEW

Member Lifecycle Campaigns leverage marketing communication and consulting expertise to acquire, engage, retain and recover members. Daxko's Engagement Solutions Team will create multi-channel communication plans for your team, including emails, text messages, and task touchpoints to ensure that we're reaching the right person with the right message at the right time.



GENERAL INFORMATION

The following questions are specific to your branch.

GENERAL QUESTIONS

1. Organization Name:

2. Branch Name:

3. What do you call your front desk or service area?

4. What is the branch phone number?

5. What email address would you like us to use as a general reply-to email address for all emails?

6. Would you like us to send texts on your behalf?

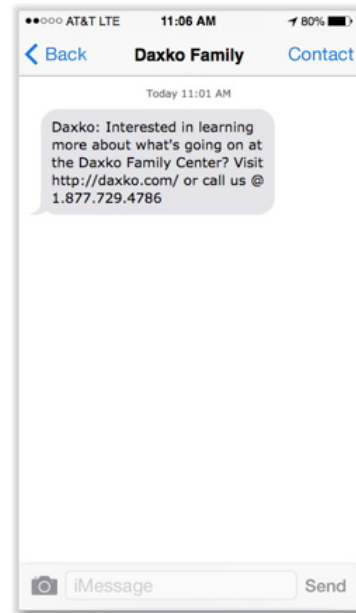
MEMBER PROSPECTING

Member Prospecting includes a text message as well as two emails. Prospects entered in Daxko Operations are targeted with a multi-channel campaign to support and drive new membership sales.

ANSWERS NEEDED

1. What incentive would you like to use in the Member Prospecting emails?

Examples: waived join fee, one month of free membership, free guest pass



EXAMPLE EMAIL & TEXT MESSAGE



Daxko Family Center

**Live up.
Have fun.
Learn.**

Join in the next two weeks and we'll waive your registration fee!



[Learn More](#)

It was great to see you at one of our recent events! We're delighted you're interested in learning more about the [Daxko Family Center](#) where people like you come to pursue a healthy lifestyle and connect with our community.

As a member, you get...

1. A FREE Fitness Orientation when you join.
2. First-priority program registration and preferred pricing!
3. A variety of exciting, [life-enriching classes](#).

Are you excited yet? [Learn more about the Daxko Family Center.](#)



600 Uni. Park Place | Homewood AL | 07076 | 205-383-1488

NEW MEMBER ENGAGEMENT

The first weeks of a new member's experience are critical to lasting membership and engagement. Our robust New Member Engagement initiative tailors messages to your new members to ensure they quickly realize the value of their membership by making them feel like part of your community.

ANSWERS NEEDED

1. What do you call your new member orientation?

2. What can a new member expect from orientation?

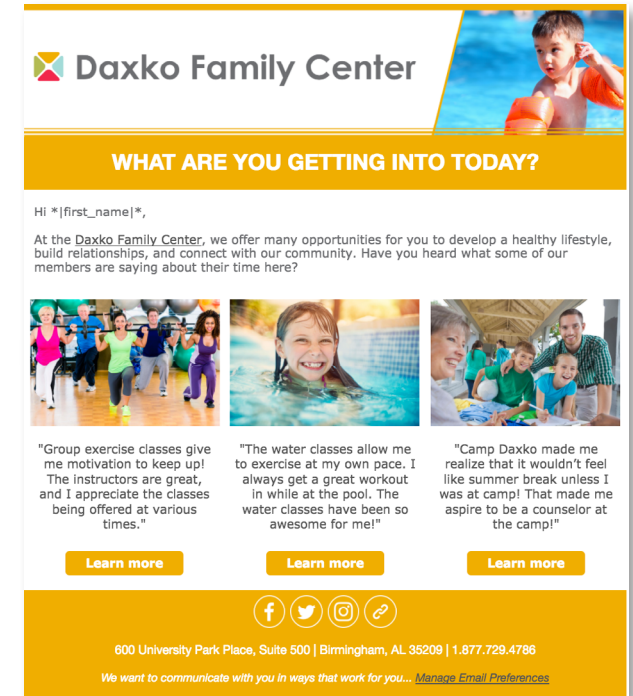
3. How do members sign up for orientation?

4. What incentive would you like to offer for the Bring-A-Friend email?

Ex. **Free guest pass**, 20% off a month's membership when your friend joins within 30 days, a free group personal training lesson.

5. Please provide a member success story for the Success Story email

EXAMPLE EMAIL



6. Please provide the signature information for New Member Engagement emails.

Name

Title

Email

MEMBER LOYALTY

The Engagement Solutions Team will survey every member bi-annually based on their anniversary month to assess member engagement and satisfaction levels using the NPS loyalty scale. We'll analyze and categorize the results, reporting them to inform your decision-making process.

ANSWERS NEEDED

2. What incentive would you like to offer members who complete the Member Loyalty (NPS) survey?

Examples: Drawing for \$20 off program registration, free Swag

3. Please provide the signature information for Member Loyalty emails.

Name

Title

Email

[Learn more about the Member Loyalty Survey](#)

EXAMPLE EMAIL



Daxko Family Center



HAVE FEEDBACK? SHARE IT!

Hi `*|first_name|*`,

We are always looking for ways to make the Daxko Family Center a better place. You are part of a small group of members selected to help us improve by sharing your feedback in this quick, two-question survey. Don't miss your chance to let your voice be heard!

As a thank you for completing the survey, stop by the Front Desk to pick up your free Daxko Stress Ball!

[TAKE THE SURVEY](#)

You spoke. We Listened. Thanks to your feedback, we have updated our yoga room to include pictures of Yoda and cherry-flavored sparkling water!

We appreciate your feedback and look forward to hearing from you!

Emily Vonbartheld
Engagement Solutions Team

600 University Park Place, Suite 500 | Birmingham AL 35209 | 1.877.729.4786
[Manage Email Preferences](#)

MEMBER LOYALTY: NPS SURVEY

The Engagement Solutions team will survey your members bi-annually to assess member engagement and satisfaction levels using the NPS loyalty scale. We'll analyze and categorize the results, reporting on them to inform your decision-making process. Positive responses are often used for member stories or for grant proposals. Consider different opportunities for use with this feedback!

Membership Survey

Your feedback will help us improve our overall member experience.

How likely is it that you would recommend us to a friend or colleague?
(Where 0 is not likely at all and 10 is very likely.)

☐ 0
☐ 1
☐ 2
☐ 3
☐ 4
☐ 5
☐ 6
☐ 7
☐ 8
☐ 9
☐ 10

Detractor

Passive

Promoter

Please tell us why you gave that score.

Maximum Allowed: **1400** characters. Currently Used: **0** characters.

SUBMIT

Member Loyalty Survey

Detractor Alert

Detractors, those who score the organization a 6 or below, will generate a "Detractor Alert" task for your **NPS Closed-Loop Owner** to follow up on. The Engage users will be able to see the survey score in addition to comments. Member information is readily available to contact the member. Performance Reports will be posted by the 10th of the following month so your team can review all responses.

MEMBER IMPACT

Membership NPS Detractor Alert
for Olivia Walker

A member has submitted a Detractor response to the Membership NPS Survey. Please take actions as soon as possible.

Task notes

Enter your notes here...

Save note Complete Task

DUE 9/21/2015

HIGH

Olivia Walker
30 years old
Member for 18 years 7 months
888-888-8888

Activity Member Info Unit Info

Initiatives that engage Olivia
TL November 2014 Senior Newsletter
Valet Parking at TownLake

9/19/2015 MEMBER IMPACT

Score: 5; Comment: The renovations impact the ease of access to programs and activities. In addition, I had some issues with requesting a suspended account while recovering from a pedestrian/automobile accident. I have been a member of the YMCA for decades and initially was told that the best option for me was to cancel my membership. The issue was ultimately resolved by the branch director but I don't feel the same level of connection that I had previously experienced.

I do enjoy the range of programming offered.

Membership NPS

ANNIVERSARY

Customers will have the opportunity to offer a gift to show their appreciation for a member's anniversary. This is a great time to remind them of the benefits of their membership and thank them for being a member!

ANSWERS NEEDED

1. Would you like to offer a gift to members to celebrate their membership anniversary? If yes, please describe.

2. Please provide the signature information for Anniversary emails.

Name

Title

Email

EXAMPLE EMAIL


Daxko Family Center


HAPPY DAXKOVERSARY!

|first_name|,

At the Daxko Family Center, your membership brings about meaningful change within yourself and your community.

We wanted to take this opportunity to remind you of some of the super cool things you were probably involved with the past year.

Here's to another year of improving health and well-being, developing the potential of children, and giving back to our friends and neighbors!

Make sure you stop by our Flight Attendant's Desk for some free Daxko Swag!

See y'all soon!

Emily Vonbartheid
Engagement Solutions Team











600 University Park Place, Suite 500 | Birmingham, AL 35209 | 1.877.729.4786

We want to communicate with you in ways that work for you... [Manage Email Preferences](#)

BIRTHDAY

The Engagement Solutions Team will send birthday wishes to your members with a thoughtful email on behalf of your organization!

ANSWERS NEEDED

1. Would you like to offer a gift to members to celebrate their birthday?
If yes, please describe.

It doesn't have to be huge.
Remember: it's the thought that counts.


2. Please provide the signature information for Birthday emails.


Name

Title


Email

EXAMPLE EMAIL


Daxko Family Center




HAPPY BIRTHDAY!




Happy birthday, ***|first_name|***, from the **Daxko Family Center**! We hope you enjoy your special day in the most special way, and we look forward to seeing you participate in our classes, programs and events.

Make sure to stop by our Flight Attendant's desk to pick your **FREE GIFT** to celebrate your birthday!

Here's to another year of a healthier, happier you!





600 University Park Place, Suite 500 | Birmingham, AL 35209 | 1.877.729.4786

We want to communicate with you in ways that work for you... [Manage Email Preferences](#)

PAYMENT INFORMATION RENEWAL (if applicable)

The Engagement Solutions Team will build Payment Information Renewal reminder emails to send to your members. The Engagement Solutions team will reach out to active members who have an expiring credit card which has been used within the past year.

ANSWERS NEEDED

1. Please select which credit cards your location accepts:

- ☐ Visa
- ☐ MasterCard
- ☐ Discover
- ☐ American Express
- ☐ Other (please specify)

2. Please provide the signature information for Payment Information Renewal emails.

Name

Title

Email

EXAMPLE EMAIL

PAYMENT INFORMATION UPDATE



Hi Sybil,

Don't forget - the payment information we have on file for you at the [Daxko Family Center](#) will **expire 2/2018**. If the information is not updated, it will be declined the next time it is used at the Daxko Family Center for a membership draft, program payment or contribution.

To update your information today, **give us a call** at 205-383-1488. We'll happily update your expired information via phone.

Want to change your payment method or account number? The Y accepts Visa, MasterCard, and Discover. We can also help you set up automatic draft payments from your checking or savings account.

Contact Us

We'll see you soon!

[Charlie Peters](#)
Senior Membership Director

Daxko Family Center



600 Uni. Park Place, Montgomery, AL 36117 | 205-383-1488

If you are utilizing
**Daxko Payment
Services**, skip this
page! Your automatic
account updater will
do this for you.

PROACTIVE RENEWAL

In an effort to renew memberships, the Engagement Solutions Team will reach out to members who have a set termination date in Daxko Operations to let them know that their membership will be expiring in the coming weeks. Instructions will be provided to ensure members know how to renew their membership.

ANSWERS NEEDED

1. Are there any Daxko Operations termination reasons we should not include when reaching out to members during Proactive Member Renewal? Please list all.

2. Please provide the signature information for Proactive Renewal emails.

Name

Title

Email

EXAMPLE EMAIL

MEMBERSHIP INFORMATION UPDATE



Hi Emily,

Your membership to the [Daxko Family Center](#) will be expiring soon. In order for you to continue enjoying the Daxko Family Center, you will need to renew your membership.

There are two quick ways for you to renew your membership:

1. **Stop by our Wellness Center** and one of our staff members can quickly and easily renew your membership.
2. **Call us at 205-383-1488** and we'll talk you through the renewal process over the phone.

Your membership to the Daxko Family Center gives you the opportunity to be a part of a community of people dedicated to living a life well lived. You are an important part of that community, so be sure to renew your membership soon and continue to be a part of our Family!

See you soon!

[Charlie Peters](#)
Senior Membership Director

Daxko Family Center



600 Uni. Park Place | Homewood AL | 29483 | 205-383-1488

MEMBER RECOVERY

The Engagement Solutions Team is full of pros at wooing back some members. Choose an incentive, and members can get back to enjoying all of the benefits of membership!

ANSWERS NEEDED

1. What incentive would you like to offer members who rejoin?

Examples: waived join fee,
one free month of membership

2. Please list one or two new and exciting features of your location former members may not know about.

3. Are there any Daxko Operations termination reasons we should not include when reaching out to terminated members during our Member Recovery emails? (e.g. NSF, No longer employee, Relocation, etc.) Please list all.

EXAMPLE EMAIL



CONFIRMATION

Please take a moment to review your survey answers for accuracy prior to submitting.
All emails and text messages will be made based on information provided in this survey.
Please enter the name, title, and email address of the staff member who completed this survey.

Name

Title

Email