

EZFacility Training

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 molding of our software to your 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 you have the following with you:

- An assembled list of services your business will offer and their associated prices.
- Any notes you had taken during your demo
- A clear idea of who your in-house EZExpert (the employee responsible for learning) will be and your activation username and password.

Having these items will provide a direct framework for merging your 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 techniques discussed throughout the training(s). While it is vital for the expert to practice between trainings, it is also important that other employees begin to learn the software concepts as well. This will ultimately lead to your company's greatest success with EZFacility. It is also essential that the expert, demonstrating a clear understanding of the software, teach these concepts.

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 tasks will be designated by EZ-Trainers at the conclusion of each phase of training. These tasks are assigned with the intention of providing an opportunity for data input and to promote information retention. The timely completion of these assigned tasks will keep training on schedule and will also ensure that any information needed to progress further in training is properly placed within the software. These tasks serve as prerequisites for future trainings and also 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 typically marked by the completion of the fourth and final phase. However, it is possible to complete training and become an EZExpert certified early; provided a facility and their EZExpert are able to confidently demonstrate the use of the software to their trainer and employees prior to the fourth training. 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 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. This import allows a user to upload an excel spreadsheet of client or lead information to be submitted to our engineers for importing into your EZFacility account. For those facilities who have both client information to submit and membership terms and billing information, we also offer an [Advanced Contact Import](#) option. This advanced option allows the facility to submit an excel spreadsheet that lists current members with their membership terms and any billing information (credit card data). It is important to note that the Advanced Import will not include any previous billing history. The third and final import available is the Point of Sale Import. This allows the facilities to submit an excel file with all current product information and designated inventories. Please note, this 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 is required. Both the Simple and Advanced Imports have a template in our [Support Center](#) that can be used as a reference when gathering the required data. The Point of Sale Import however, is available upon request due to other requirements (mentioned above). It is important to note that requesting exporting 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 can plan accordingly.

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