The Science of Member Retention

Key Principles Your Competitors Don’t Want You to Know

Lance Perkins
# Contents

- **Intro** ............................................................... 3
- **What Does Science Really Say?** ................................ 3
- **Chapter 1** .................................................................. 5
  - **Why is Retention So Crucial?** .................................. 5
    - The health club industry may not be so healthy ....................... 6
    - So, who are my real competitors? ........................................ 8
    - A perfect storm ................................................................... 9
- **Chapter 2** .................................................................. 11
  - **The Science of Keeping Your Members** .......................... 11
    - It Got Ugly, So PhDs Had to Get Involved ............................. 13
    - Onboarding ....................................................................... 13
    - Member Engagement ................................................................ 15
    - Ready, set, wait a minute, where did they go? ....................... 18
    - It’s all about the psychology of behavior change .................... 20
- **Chapter 3** .................................................................. 23
  - **Measuring with the Right Stick** .................................... 23
    - Leading vs. Lagging Indicators ........................................... 23
    - Survival Analysis ................................................................ 25
- **Chapter 4** .................................................................. 26
  - **What’s Your Game-plan?** .............................................. 26
    - Do these few things, but do them well ................................. 26
- **Chapter 5** .................................................................. 29
  - **How We Can Help** ...................................................... 29
    - Putting it all together ................................................................ 32
- **Endnotes** .................................................................... 33
What Does Science Really Say?

Whether you are a new executive director, membership director, or a COO trying to manage a multi-branch association, chances are that you are currently struggling with the challenges of membership churn - turning members over faster than you are bringing them in.

In fact, most months you are probably losing more members than gaining new ones. So basically, your membership base is in a constant state of flux and most likely steadily shrinking. That’s not the direction that you want it to go.

Year after year, I see directors attempting to improve membership retention, but ultimately experiencing frustrating outcomes. And as a result, most just throw their hands up in the air and simply accept high membership dropout rates.

The purpose of this e-Book is to help you navigate through all the fluff. There are numerous “solutions experts” in the form of consultants, equipment vendors, operational and fitness technology companies, you name it, everyone has THE solution
you. Let’s mix things up a little bit and look at the science behind what really does impact member retention.

The science you say? What do you mean science? Well, believe it or not, there is a plethora of research that clearly identifies what really will extend exercise adherence and gym membership tenure.

So if you want to change the retention game, let’s get started.
That’s a great question. I mean, what difference does it make anyway? The outcome will always be the same, right? In other words, there is probably no way you can really influence membership churn, so maybe you should just double down your efforts on selling more memberships.

And that my friend has been the strategy of most fitness centers for the past 20+ years. The common term for this strategy is called “outrunning attrition.” And quite honestly, if the market is big enough and is still growing - and you have an exceptional sales process with aggressive sales people - you can get by with that strategy.

But, there is just one little problem. That strategy just won’t work anymore. Let’s take a closer look at why I can say this with such confidence.
The health club industry may not be so healthy

As John F. Kennedy often said, “a rising tide lifts all boats.” For our purposes, this aphorism gives us a clear illustration of how all businesses in an industry will benefit when the industry itself is growing.

So in a growing health club industry, where there are plenty of people looking to join fitness centers (high demand), and there is a fixed number of fitness centers available (fixed supply), we will all enjoy a big influx of people walking in our front door, regardless of how much competition we have. Yes, those were the good old days.

But now, there are multiple forces at play that have not only dramatically changed the competitive landscape, but the industry as a whole has changed as well. Let’s dig a little deeper and see what’s going on.
Less than a decade ago, there were fewer than 18,000 operating health clubs, including YMCAs. The 2014 Health Club Consumer Report found that there are now almost 33,000.¹ So the “supply” of health clubs has increased 83% over the past decade. That’s great news, right? I mean obviously, the industry has experienced some significant growth.

The problem is that the number of people joining health clubs hasn’t significantly changed. So, the “demand” for fitness centers has remained the same since 2011.

Now, if you look at a four-year trend, you can see the result. With more facilities and the same number of fitness seekers, the average number of members per facility has gone down. So, the leading indicators are showing that our industry is heading into a mature stage of its life cycle.

This means that we can’t count on a ton of people walking in the front door to offset the churn of members walking out the back door anymore.

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¹ Source: IHRSA 2014

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Industry Trends

Research shows that the percentage of Americans using fitness centers has peaked.

% of U.S. Population Using Health Clubs

<table>
<thead>
<tr>
<th>Year</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>17.7</td>
<td>18.0</td>
<td>17.5</td>
<td>18.2</td>
</tr>
</tbody>
</table>

At the same time, the number of facilities has grown. Increased competition has caused the members per facility to decline.

Avg. # of Members per Facility

<table>
<thead>
<tr>
<th>Year</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>#</td>
<td>1,677</td>
<td>1,716</td>
<td>1,646</td>
<td>1,628</td>
</tr>
</tbody>
</table>
So, who are my real competitors?

Your target customers now have more options than ever before when it comes to getting into shape. The Hollywood-style DVD workouts like P90X, Insanity, T-25, as well as hundreds of other specialized programs have exploded.

And with broadband now everywhere, virtual training videos and programs have come a long way. And let’s not forget about the hundreds of mobile applications that basically provide a high quality trainer in your pocket. Oh, and what about boot camps that are in the park, or just about anywhere people like to gather? All of these are options that people did not have literally five years ago.

As you are well aware, life is not getting any less hectic. The bottom line is that we are ALL busy and people just do not have the discretionary time they used to have to drive out to a gym, park, workout, shower, and drive home. It’s a huge time commitment and a huge barrier.
A perfect storm

O.k., I think we are all on the same page on how the market, well...kind of sucks. The compounding problem is that the membership churn rate is growing as well. In fact, three-year trends show that people are not staying with their health clubs, including Ys and JCCs, as long as they used to...not even the senior population that used to be the anchor in keeping our member retention rates somewhat steady.

The question is, why are people not staying as long? The economy? More competition? More options to fill their fitness need? The answer, in short, is all of the above. So, how can we begin to attack this seemingly overwhelming problem? By understanding patterns of behavior.

And we know patterns.
Question: How fast do we as an industry lose new members?

There is research dating all the way back to 1988 that addresses this very question. A study of 17 YMCAs around the county by Dr. James Annesi and Jennifer Unruh revealed that without intervention involving behavior modification principles, over 62% of new members had stopped exercising within six months.\(^2\) Perhaps even more telling, a 2009 study showed that over 50% of new members on a standard monthly contract had terminated their membership within eight months and over 80% had within two years!\(^3\)

Dr. Paul Bedford conducted his PhD thesis on factors that affect membership rates in the gym environment. His analysis looked at gym membership survival rates over a four-year period. This was fascinating research since there have been numerous studies on how long people survive over 12 months, but four years? That’s a long time.

The results were eye opening, but they supported everything we have already seen. On average, fitness facilities lose almost 75% of their new members within just 24 months and roughly 90% within four years! Are you kidding me?!
Chapter 2
The Science of Keeping Your Members

Many people ask me why we use the terms “science” and “member retention” in the same sentence. You know, if I really think about it, it is kind of funny. We make it sound like it’s some kind of paranormal anomaly that should be studied in a lab, right? Actually that’s partly true….just not the paranormal anomaly part. The fact of the matter is that membership retention has been studied in great detail.

There have been more than 300 research projects looking at all kinds of factors affecting exercise adherence within the gym environment.

This is actually good news, unless the research shows that there is little one can do to affect membership outcomes. Well I’m happy to say that is not the case; otherwise I’ve spent a whole lot of time writing about one big depressing topic.

First thing’s first. Let’s get a handle on our target audience and what impacts their decision making. As I said, there’s a ton of
information out there, and here are just a few of the key topics that have been researched:

• What do people think about exercise?
• Why do they quit?
• Different demographic profiles and the impact on retention.
• Types of membership, such as family, single, etc.
• Payment of a joining fee.
• Payment method (annual/monthly).
• Frequency of visits - particularly in the first 30 days.
• Member Engagement and the impact of member-to-staff interactions and member-to-member interactions.

Some of these factors can be controlled to significantly boost your member retention, while others, not so much. For example, you can’t control the age of the person walking in your front door, and age is a big factor in membership retention. A study conducted by the Fitness Industry Association showed that members aged 45 and older have an average retention rate of 71% versus just 48% for 16-24 year olds. That is a huge gap. But the good news is that there are key factors that you can control to make a big impact on member retention outcomes. Let’s explore what those are.

PRO TIP

Your onboarding and member engagement activities can affect the number of times a new member visits during the first 30 days, which is a big factor. The key number is less than four visits. New members who visit less than four times have an average retention rate of less than 58%. However, people who visit between 8-11 times have a retention rate over 71%!
It Got Ugly, So PhDs Had to Get Involved

There are some thought leaders, really smart guys, who have devoted their careers to figuring out the membership retention challenge. Dr. James Annesi has been published in over 180 peer-reviewed research journals on factors that can help improve exercise adherence. Dr. Paul Bedford has done some fascinating research on the impact of new member onboarding and it’s impact on membership retention.

Onboarding

From all of Dr. Bedford’s research, there is one study that almost jumps off the page. He found a single factor that impacts member retention so much that it seems like magic! And that single factor is new member onboarding. Before we show you the startling results of his study, let’s be sure we understand the concept. What exactly is onboarding anyway?

“Membership onboarding is an intentional process whereby a NEW member is introduced gradually into the fitness center by a series of one-on-one meetings with a dedicated professional/coach. Discovering the member’s goals, barriers, and self-efficacy, as well as helping them reach those goals, and get integrated into the facility, are key components of the onboarding process.”
It seems fairly simple, right? So how big of a difference does proper onboarding really make? In order to find out, Dr. Bedford ran a study where a control group was given a standard one hour orientation. A second group was given the same one hour orientation plus three follow-up appointments with a wellness coach that were 30, 20, and 10 minutes respectively in duration. The aim of these follow ups was to ensure that the new member’s goals were clearly understood and that they were given a plan for overcoming barriers and achieving those goals. The results were eye-popping and should be etched in the mind of every fitness and executive director!

![Retention Rate by Treatment Recieved](chart)

Source: Why People Join, Leave, and Stay with Health/Fitness Clubs: The Ultimate Handbook of Member Retention
What Dr. Bedford found is that after one year, 70% of those that were properly onboarded properly in the first 30-days of membership, remained while less than 40% of those that were given a standard orientation were still there.\(^5\) That’s more than a 75% increase in member retention! Dr. Bedford’s research shows that by focusing your resources on this one key area, you can see a dramatic improvement in your member retention rates.

**PRO TIP**

Learn the best practices in the industry on proper onboarding, by downloading our Free e-book.

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**Member Engagement**

But, Dr. Bedford’s research did not stop there. He uncovered another vital area that had a major impact on member retention. An interesting trend you may have noticed is the whole movement towards “member engagement.” You see it everywhere now. For example, if you tried to Google “member engagement director” for a health club or YMCA just two years ago, you wouldn’t have seen anything pop up. But now, if you Google those same key words, you will see page after page of member engagement positions posted.

It’s interesting how so many people have flocked towards the term “member engagement.” But have you ever asked yourself, what
exactly member engagement even means? Is it ANY kind of communication or interaction between a fitness center staff person and member? Are there different degrees to member engagement? What exactly is the outcome you are hoping for as a result of member engagement - better member retention? Has anyone even stopped to ask if there is any research out there showing how much member engagement actually impacts membership tenure, if at all?

These are all key questions to ask because member engagement takes staff, training, monitoring, and accountability. The bottom line is that if you are going to do it right, there has to be a game plan and proper execution of that plan.

Just for the record, this is what member engagement is not: It is not sending automated emails, or texts to your member base. It is not robo-calling people and leaving messages. It’s not even leaving personal voice messages or sending birthday cards.

Effective member engagement, plain and simple, is when your members are having meaningful, face-to-face interactions with your staff AND with each other. It involves not just communicating with members, but communicating with them in a way that brings value and helps them reach their goals.

All the research demonstrates that regardless of how solid your process and automated customer service is, if you don’t have personal interactions, you will struggle with member retention.

One of the big discoveries from Dr. Bedford’s work is the impact
of member engagement on membership tenure outcomes. And here is where it gets ugly, the research shows that without any engagement from staff, people begin to dropout within as little as six weeks.\(^6\)

Another study looked at a simple engagement interaction between staff and members. It found that members who had 2-3 interactions in a month with staff were 50% more likely to return the following month. Up that to more than four interactions, and it jumps to an 80% greater likelihood of coming back.\(^7\)

<table>
<thead>
<tr>
<th>Probability of visiting next month</th>
<th>1 Interaction</th>
<th>2-3 Interactions</th>
<th>4+ Interactions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>20% more likely</td>
<td>50% more likely</td>
<td>80% more likely</td>
</tr>
</tbody>
</table>

The ultimate handbook of member retention: Paul Bedford, Ph.D. 2012

**PRO TIP**

A big challenge most managers face is motivating staff to engage your membership base. The reason why it often falls on deaf ears is because your staff has been desensitized to the “flavor of the month” coming down from management. But by showing them the science behind what’s been shown to really create member loyalty, you are painting a picture of a much bigger WHY, so they can see it and understand why their efforts are so important. Can someone give me an AMEN on that?
Ready, set, wait a minute, where did they go?

O.k., so you have a solid member acquisition plan in place and you have executed it well. Finally, there are some prospects walking through the front door. You have trained your membership and sales team on the importance of giving high impact tours and closing the prospects on the sale. Congratulations! You just signed up a new member. Now what?

What happens to that member in the next two weeks will be critical, and if your process is not executed properly, all the hard work and money you spent getting them in the door will be undermined. In fact, it is estimated that industry-wide, the average cost of acquiring each new member is $300. This is referred to as CAC, or customer acquisition costs. A key metric you should measure is also LTV, or long-term value. In other words, how long do people stay and how much revenue do you collect over that lifecycle. If your CAC is higher than your LTV, then you have a big problem.

When a member first joins, as you are well aware, it can get overwhelming for them, fast. There are so many options for them and as we talked about earlier, the best thing you can do is onboard them properly.
Properly onboarding new members begins with the handoff from the membership staff to the wellness staff (wellness coaches and personal trainers). If you don’t have a solid process for transitioning the member between these two groups, then they will most surely slip through the cracks. So even though you may have great intentions, before you know it, the member is nowhere to be found.

Having a solid process in place—so that your staff knows exactly what happens—is key. A best practice is to create a visual process map with all parties involved in the handoff.

Be prepared for a surprise, though. Drawing a process map will allow you to see the disconnect between membership and wellness in terms of who is responsible for each critical action, i.e. phone call reminders for appointments, etc. If you have never done a process map and would like to learn how, you can download a reference here.

**PRO TIP**

Have your key department heads from membership and wellness build a process map. Once the process map is complete, have all staff sign off on the process to ensure everyone is on the same page.
It’s all about the psychology of behavior change

O.k., so you have perfected your onboarding process and you have a flood of new members scheduled to meet with your wellness coaches and personal trainers. Is that it? Now you can sit back and watch your retention numbers increase, right? Boy I wish it was that easy. There is one more critical element you have to ensure is happening with your member engagement sessions, and that is understanding your members’ psychological stage-of-change.

If a new member is not used to regular exercise, then your coaches need to focus on helping those members develop strategies for overcoming the barriers that will raise their ugly heads and cause your beloved members to “fall off the wagon” when they are not with you.

If you think about it, it makes perfect sense. Adopting a consistent exercise habit and lifestyle change requires a dramatic change in behavior, particularly if you happen to be a person who is not active.

So, here is where the disconnect occurs. In their passion and drive to help their clients, most wellness coaches and personal trainers gravitate
towards exercise and nutrition prescription. This is a natural tendency since many have degrees in exercise science and/or personal training certifications. It has taken them years to amass their knowledge of exercise programming and nutrition principles.

However, there is no research or data, nada, zippo, which supports the belief that creating a diet and exercise program alone—no matter how sound they are—will produce long-term exercise adherence and member retention. In fact, all the data shows no change whatsoever in long-term exercise adherence resulting from traditional coaching methods.

Now that’s not to say that there is no need for developing exercise programs for people. There is a time and place for those components. But exercise and nutrition prescription in and of themselves will not help your target health seeker population in adopting and maintaining a healthy lifestyle change. What has proven to impact long term retention and helping members reach their goals is applying behavior modification techniques.

PRO TIP

Exercise prescription is driven from first understanding your member’s stage-of-change. The lower the stage-of-change and self-efficacy, the lower the exercise intensity must be, or the consequence is another lost member.
Behavior modification counseling is not rocket science but you do need to be intentional. Hearing what your members say will help you quickly understand what stage they are in.

For example, if your member just bought some new shoes and workout clothes and has been thinking about starting an exercise plan for the past couple of months, you know they are in the “preparation” stage-of-change. Once they start an exercise program, they move into the “action” stage.

The takeaway here is that the lower the stage-of-change, the lower their self-efficacy, or self-confidence. The lower their self-confidence, the lower the level of exercise-induced discomfort they can handle. So, exercise prescription has to be very, very light at first.

**PRO TIP**

To learn more about how to incorporate best-practice engagement sessions and training your wellness coaches on behavior modification counseling, download our FREE eBook, *Behavior Modification*. 
Chapter 3
Measuring with the Right Stick

Alright, we’ve seen the science. Research shows that real change in your member retention can be found by proper onboarding, engaging your members with real value, and employing behavior modification techniques. But, before you begin putting your plan in action, there is one more topic we need to cover. In order to make improvements in any metric, such as member retention, you have to have the data that helps give you a baseline and understand exactly where you are as an organization. Too often, managers struggle with understanding their true retention rate, attrition rate, and membership churn.

Leading vs. Lagging Indicators

Here’s one of the reasons why: Most fitness centers measure membership retention as a 13-month rollover. There are two fundamental problems with using this as your standard measure of retention rates. First, it only gives you a measure of past performance. You have to wait a full year to know how much, if any, improvement you have made and thus come to understand how you are doing only after members have already left. As such, 13-month rollover is a classic example of a lagging indicator.
Wouldn’t it be great if instead of looking back and analyzing what has already happened, you could somehow look ahead and predict what will happen in the future? How much more effective could your adjustments to your organization be if you could measure their effectiveness in real time rather than waiting a year to see the result? The great news is you can. And it doesn’t take a crystal ball to do it.

Predicting the future effectiveness of changes you are making is the “magic” of leading indicators. Leading indicators are the key metrics of your facility that predict future membership retention and growth. In a fitness center environment, the leading indicators that have the greatest statistical correlation to future membership retention are things like: the percentage of new members enrolling in your onboarding program, early stage usage, the percentage of members that use your facility daily, and how long NEW members are lasting in the first three months of membership. By analyzing these leading indicators, you can predict future member retention rates...without a crystal ball.

**PRO TIP**

To learn more about leading indicators and how to use them in your facility, download our FREE white-paper, *Decoding the Mysteries Behind CTQs, KPIs, and Leading Indicators.*
Survival Analysis

A second problem with measuring retention with metrics like 13-month rollover is that it doesn’t give you vital data you need on when people are dropping out! The graph at right demonstrates two hypothetical fitness centers that both have a 40% 13-month retention rate. But, how they got there is completely different. Using a survival analysis curve, we can see that Branch 1 retained members fairly well, then had a big drop at the 12 month mark.

In contrast, Branch 2 had a significant drop right out of the gate and then flattened out. Not only is there a huge difference in the revenue of these branches (Branch 1’s is much higher because it retained members longer), but there is also a big difference in how to respond to the problem. Since Branch 1 is seeing a big drop right around the one year mark, it may want to purchase software that lets them see members who are approaching this milestone so coaches can be instructed to engage them, or so they could be sent mailers with discount offers. On the other hand, Branch 2, with its significant drop right out of the gate, will want to focus its resources on driving more new members into its proven onboarding program.

PRO TIP

Make Survival Analyses one of your key metrics for measuring member retention to see when members are dropping out. Then develop strategies for addressing that problem over time.
Chapter 4
What’s Your Game-plan?

O.k. We have covered a lot of key, researched-based, information to give you the confidence to march forward in attacking your membership retention challenges head on.

Now it’s time to put a plan in place and execute. Let’s explore some high level elements you will need to include.

Do these few things, but do them well

Many managers/directors get overwhelmed with trying to put together member engagement programs that require extensive follow up, some lasting up to 6-12 months.

Well, I have good news. If you look back through all the research we discussed in the previous chapters, everything that has been shown to make an impact happens in the first 30 days of membership!

Think about it, all you have to do is front-load your efforts and direct your staff’s focus to just the first 30 days of your new member’s experience. That makes things a lot more manageable, right? So let’s break it down: we know that it’s key for your new members to visit your facility more than four times during that first 30 days, and that two times per week would be ideal.

In order to get those visits up, you must have a solid process in
place to properly onboard every new member. And when you meet with those new members, you need to first understand their stage-of-change, help them identify barriers and challenges that have caused them to fall off the wagon in the past, and then develop strategies to help them stick with a new lifestyle change.

Then, you need to measure your outcomes to quickly determine what modifications need to be made so that you can adapt quickly. If you don’t address the challenges below, you will be caught in a vicious cycle.

If you really break it down, there are just four key elements you need to focus on to grow your membership base:

1. Since there are fewer and fewer people walking in your front
door, you have to master your touring process and ensure you get high conversion rates.

2. Have a solid onboarding process in place and ensure handoff happens every time from membership to wellness and that you have a solid follow up program to ensure that your members are showing up for their appointments.

3. During your engagement sessions, your coaching staff must teach your members key behavior modification and self-efficacy skills to ensure long-term change.

4. Measure the right metrics through survival-analysis to know how long your new members are lasting and when they are leaving so you can make appropriate changes.

So, there you have it. I know it’s not just that easy, but at least you now have some direction on where you should focus and have the research to backup your efforts.
Chapter 5
How We Can Help

MobileFiT is a company dedicated to giving YMCAs and fitness centers the training and technology you need to maximize your member engagement and retention. Specifically, here are some ways we can help:

1. **FREE resources.** We trust that *The Science of Member Retention* has been a benefit to you. You can find a treasure trove of similar eBooks, whitepapers, and webinars on our Resource Library page. They are all free to you and your team. Also, be sure to check out our blog.

2. **On-Site Training.** *Membership Mastery University: A Scientific Approach* is a one-day training program for you and your staff designed to make a dramatic impact on your member experience and membership retention performance. We’ll train your staff in the science of what really works toward keeping members for the long haul and then give them a time of practical workshop discussion on how these principles can be put into practice at your facility. Learn more about Membership Mastery University here.

“When we decided it was time to really look at what it is going to take to improve our member engagement and retention outcomes, we tried MobileFiT’s Member Mastery Program. Their staff training is completely supported by evidenced-based research, and the best I’ve seen to help improve member engagement and retention outcomes. I would highly recommend to anyone who is ready to make a change and see results to look at their program.”

-Casey Klein, VP of Operations - YMCA of Metropolitan Dallas
3. **Technology Platform.** MobileFiT offers the only technology platform built around the science of what really works for engaging your members, helping them reach their goals, and keeping them at your facility.

**Tools for your Membership staff:** Our Get On Board iPad app allows your membership staff to give high-converting, totally paperless tours. When the tour is over, there is no long forms to fill out, membership is just a click away. An appointment with a wellness coach can be scheduled instantly, and coaches have access to all the data collected, allowing new members to be enrolled in your onboarding program in the most frictionless way possible.

**Tools for your Wellness staff:** With MobileFiT’s Coach iPad app, wellness coaches can set process-oriented goals and examine barriers with new members. The app enables them to create custom workouts that are pushed to the member’s phone and then track progress toward their goals. Coaches can tweak workouts, change seat settings, or affirm the goals reached, engaging members like never before by giving them real value in every interaction.
Tools to give your members an amazing experience: Give your members an interactive experience with your facility with the one thing that never leaves their side – their phone. With MobileFiT Assist, your members will be able to receive custom workout programs from their coach, see the group fitness classes and other activities at your center, and track their workouts and progress toward their goals. Assist serves as a hub, so diet regimens, number of steps, and cardio workouts can all be tracked in one place, making it the only wellness app your members will ever need.

“As our YMCA looked for tools available to successfully engage over 10,000 members, we found that MobileFiT was the only technology built around enhancing the relationships between our Wellness Coaches and their members; thus allowing our Coaches the ability to help keep people motivated. MobileFiT has given us the ability to personally connect with an unlimited amount of members, which in turn has allowed us to maintain a retention rate around 72% with very little increase in salary costs.”

-Michael Wennekamp, CEO - Two Rivers Family YMCA
Putting it all together

Get on Board, MobileFiT Coach, MobileFiT Assist, and our Executive Dashboard: the four technologies that take the proven science of what really works in member retention and work together in one seamless platform. Here’s how our technology works together to help you maximize member retention at your fitness facility.

For more information about MobileFiT’s training or technology, give us a call at (888)817-7404 or find us on the web at www.mobilefit.com.
Endnotes


4 Stephen J. Tharrett & Paul Bedford, Why People Join, Leave, and Stay with Health/Fitness Clubs: The Ultimate Handbook of Member Retention (Monterey: Healthy Living, 2012), 105

5 Ibid. 122.

6 Ibid.

7 Ibid., 175.