
8 WAYS EXCEL HQ HELPS

INSTRUCTORS, TRAINERS & COACHES



Excel HQ

Control your business. Connect with others.

Excel HQ is a growing community of professional instructors, trainers and coaches involved in personal fitness and wellness, music education, martial arts, performing arts, sports instruction and more. Excel HQ was created to solve a common problem we see and to create an opportunity we envision.

THE PROBLEM WE SEE

While professional service providers have the unique knowledge and passion to help their clients excel in their life activities, they often lack the skills or interest to effectively manage their business. And who can blame them as many of these business tasks are administrative paperwork oriented, time-consuming and often boring. How many of the following characteristics are familiar to you for your business:

- *Client contact information is disorganized or missing*
- *Session scheduling is manual, often paper-based and bottlenecked on the service provider*
- *Sessions and payments tracked on paper by hand*
- *Time wasted chasing payments often leading to getting paid late*
- *Time wasted repetitively preparing and sharing lesson/activity plans*
- *No reports or other insight available to help manage and grow the business*

Find yourself with two, three or more of these characteristics and your business will suffer from:

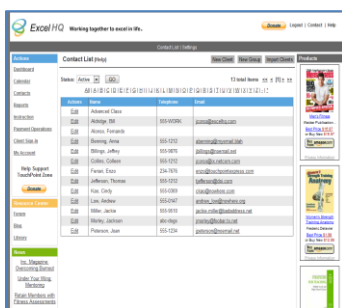
- *Wasted time*
- *Missed opportunities*
- *Lower revenue and profits*
- *Client dissatisfaction*
- *Professional Burnout*

If any of this seems familiar to you, you're not alone. By some estimates, individual instructors, trainers and coaches spend, on average, 8.5 hours per week on administrative tasks and paperwork. And remember, this is not the glamorous parts of our work. No wonder there is a lot of professional burnout.

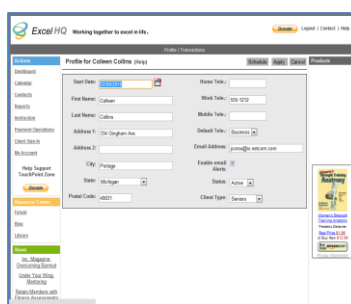
The Excel HQ online service was created to solve the problem of burdensome administrative tasks for professional service providers such as you.

BENEFIT #1 - EXCEL HQ SOLVES THE INFORMATION ORGANIZATION PROBLEM

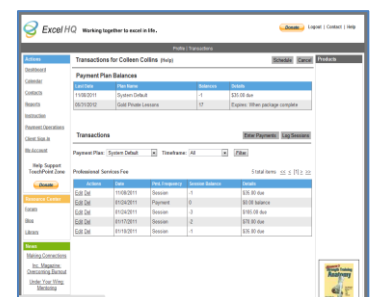
Excel HQ provides a powerful database to securely store and retrieve important information about your clients. Gone are the days of fumbling through disorganized desk files and scraps of paper notes to find the information you need.



Get quick contact information in the Client List View.



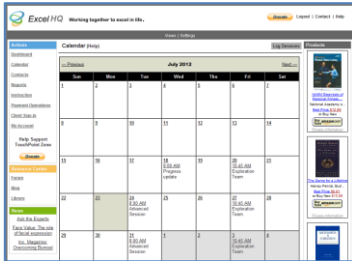
Get detailed client information in the Profile View.



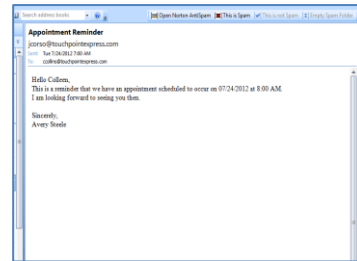
See session and payment history in the Transaction View.

BENEFIT #2 – EXCEL HQ SOLVES THE SCHEDULING PROBLEM

The Excel HQ calendar makes it easy for you to keep track of all of your scheduled sessions along with other business and personal appointments. To prevent missed sessions, you can optionally select to send a personalized email reminder notice to all attendees.



Keep track of your sessions in the integrated calendar.



Eliminate no-shows and late arrivals! Tell Excel HQ to send your 'forgetful' clients appointment reminders.

BENEFIT #3 – EXCEL HQ SOLVES THE SESSION TRACKING PROBLEM

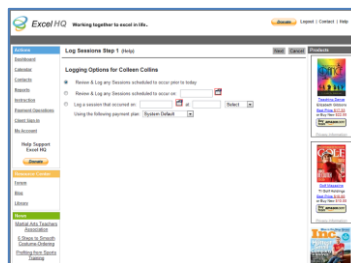
By far the easiest way for you to track sessions with your clients is to use your Smart Phone to scan your client's personalized ZoneCode™ barcode which they get by registering at [TouchPoint Zone](http://TouchPointZone.com), the client portal companion website for Excel HQ. This will automatically record a session transaction for that client with you.

Alternatively, if you have a computer connected to the internet at your studio, you can simply bring up the Excel HQ Client Welcome screen which your clients will use to "sign-in" when they arrive for their session. Excel HQ will log a session for each of your clients that sign-in using the Client Welcome screen.

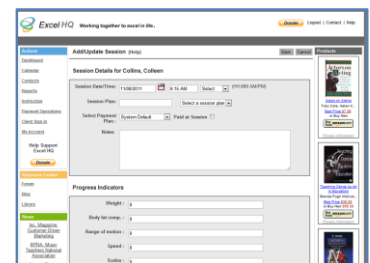
Finally, if you do not have access to the internet at your studio you can easily use the calendar from your account back at your office to display and approve a list of all sessions that were scheduled occur on or before a specific date.



To easily record a client session, use your smart phone to scan the client's unique ZoneCode™.



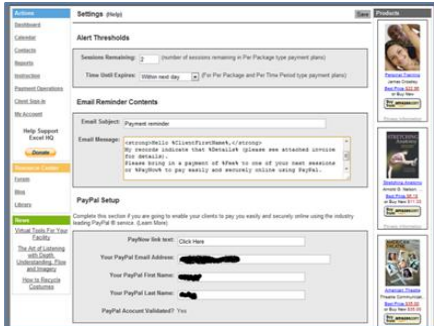
Alternatively, you can simply review and log sessions that you had previously scheduled in your calendar.



You can always add as much detail as you would like about the sessions you conduct.

BENEFIT #4 – EXCEL HQ SOLVES THE ‘GETTING PAID’ PROBLEM

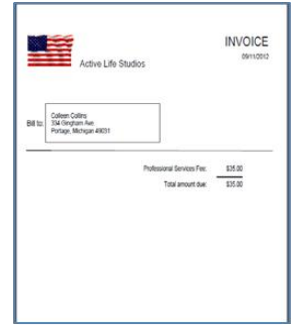
To help ensure you get paid in a timely manner, Excel HQ can send a personalized payment reminder email to any of your clients that have a payment coming due. Excel HQ can include a link in the reminder email to enable your clients to pay you through the industry leading PayPal® payments service. PayPal will notify Excel HQ when it has finished processing their payment and Excel HQ will automatically create a payment transaction for that client, keeping your records up to date.



You can tell Excel HQ when you would like payment due reminders sent and personalize the contents of the email.



The contents of your payment due reminders can include an invoice and a “Pay Now” link to enable your clients to pay easily and securely using the industry leading PayPal® online payments service.



Excel HQ automatically produces professional invoices so your clients are always aware of the services you provide and the fees they owe.

BENEFIT #5 – EXCEL HQ REPORTS SOLVES THE BUSINESS VISIBILITY PROBLEM

Managing the financial aspects of your business is often one of the biggest challenges you will face. With Excel HQ Reports, you'll always know where your business stands.

The Transaction History report lets you and your clients know about all sessions and payments.

The Payments Coming Due report gives you early insight into which of your clients needs to make a payment.

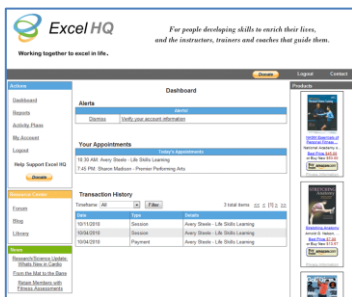
The Revenue Summary report lets you and your accountant know exactly how the business is doing.

THE OPPORTUNITY WE ENVISION

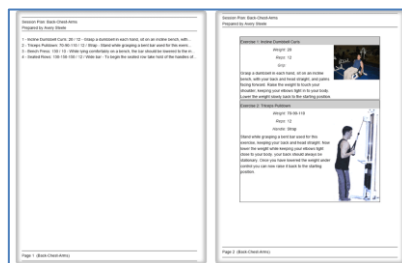
Households often want to work with multiple service providers. For example, mom may be at the gym with a personal trainer, dad may be taking golf lessons with the local pro, and little Susie is taking dance lessons before going to martial arts class with her brother Johnny. A hidden, interconnected network exists between various service providers and the community of their clients. This interconnected network represents an untapped source of new clients for service providers. To help you realize the value of this interconnected network, we have created [TouchPoint Zone](#), the companion client portal website for Excel HQ.

BENEFIT #6 – THE TOUCHPOINT ZONE CLIENT PORTAL EXTENDS THE SERVICES YOU CAN PROVIDE

Time is valuable. The TouchPoint Zone client portal creates a convenient, connected ecosystem so you and your clients can make the most of your time together.



The TouchPoint Zone Dashboard gives your clients key information at a glance.



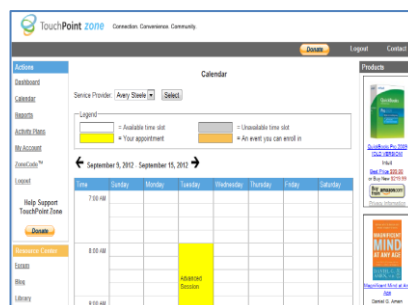
Your clients can access Lesson/Activity plans you have created that further capture your unique approach and enable your clients to continue their progress.



Your clients can see Progress reports based on key indicators you define and input for their sessions.

BENEFIT #7 – TOUCHPOINT ZONE OPTIMIZES YOUR TIME

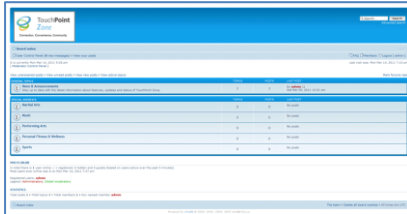
The TouchPoint Zone Client Calendar helps your clients be on time for appointments, enroll in classes you have created plus lets them schedule additional sessions with you which means more business!



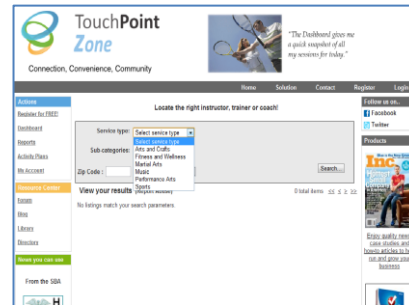
The TouchPoint Zone calendar means fewer missed or late appointments plus more business.

BENEFIT #8 – TOUCHPOINT ZONE GIVES YOU EXPOSURE TO A LARGE COMMUNITY

Now, when mom logs in to her TouchPoint Zone account to see her appointments with her personal trainer, she can also interact with other community members with similar interests and best of all, use the Service Provider Directory to find a piano teacher for Susie, confident in the knowledge that other TouchPoint Zone families are using that teacher.



The TouchPoint Zone forums give you and your client's access to many others with common interests and needs.



The TouchPoint Zone Service Provider Directory lets you be found by a large community of individuals all looking to Excel in life!

LET EXCEL HQ HELP YOU CONTROL YOUR BUSINESS AND FIND NEW CLIENTS!

Remember, none of us really like to be bothered with the boring, time consuming administrative tasks required by our businesses that keep us from spending more time with our clients. And while nobody went out of business because they didn't use Excel HQ to streamline this drudgery, they might wish they had! Plus, it's rare that our businesses have all the clients we would like. Now is the time to let Excel HQ help you control your business and connect with others. The next steps are simple:

- ✓ Simply sign-up at Excel HQ. It's free and easy.
- ✓ Customize the useful defaults to add your personal touch.
- ✓ Encourage your clients to get their personal ZoneCode™ at TouchPoint Zone. It's also free and easy for them to sign-up and makes session sign-in and tracking a breeze.
- ✓ Best of all, once you customize your Excel HQ account you can sit back and let Excel HQ help you be more productive, improve your cash flow and grow your business. ***It's not 'One more thing to do' – It's a whole lot less to do!***
- ✓ Spread the word to other professional service providers you know. The more clients we can get signed up at TouchPoint Zone, the more potential clients all our service providers have. Together, let's make this community go viral!



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