Understanding Employee Event Statistics

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About Employee Event Statistics

DataTrak's calendar and scheduling tools can help you organize services and appointments held between members and trainers. In addition to reporting on customer metrics on the Event Statistics page, you can organize and report on these services with focus placed on the *employee* instead of the member. Owners can also use this employee event summary information to periodically assess and compare the productivity and profitability of their trainers.

To view employee event statistics, use the following tabs on the **Event Statistics** page:

- Employee Productivity

- Employee Sales

- Employee Productivity Goals

- Employee Profit Center Goals

Each of these tabs has a set of pre-defined search favorites that you can use to quickly find the information you need. This document describes the columns selected in each of these search favorites.
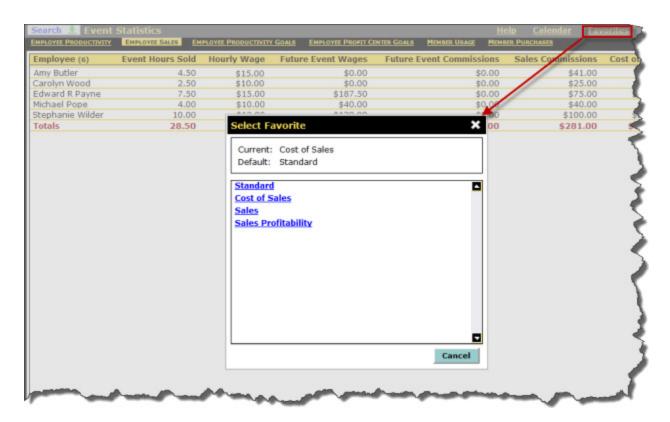
Pre-Defined Search Favorites

To make it easier for you to find and view employee event statistics, several pre-defined search favorites have been created. The list of available search favorites for each employee event statistics tab on the Event Statistics page is provided in the table below.

Employee Productivity Tab	Employee Sales Tab	Employee Productivity Goals Tab	Employee Profit Center Goals Tab
Cost of Events Opportunities Productivity Profitability	Cost of Sales Sales Sales Profitability	Event Revenue Opportunities Opportunity Handoff Rate Opportunity Sold Rate Percent Member Time	This tab does not have favorites. You can simply perform a Search by Profit Center.

Note: Each tab also has a **Standard** search favorite that displays all available columns.

To use these pre-defined search favorites

1. Click **Menu**.

2. In the Schedule submenu, click **Event Statistics**.

3. On the Event Statistics page, click the desired tab and then click **Favorites**.

4. In the Select Favorite dialog box, click the desired favorite.

   The following is an example of the search favorites for the **Employee Sales** tab.

Custom Search Favorites

If the pre-defined search favorites do not give you the specific information you need, you can create your own custom search favorites to display information such as **Sales Last Month** or **Sales This Month**.

Search results are displayed in a single row per employee. If you need to compare two events for the same employee (for example, PT events compared to Fitness events) the report can be run twice, once for each event type.

Note: If your search results show N/A, that indicates that the Event and Event Level filters were not set to **ALL**.

Search Results

When viewing search results, please note the following:

• Aggregate measures of data (such as **Total Hours** worked or employee gross cost) are only available if you choose ALL for the Event and Event Level filters.

• Opportunities are based on the number of members attending the event, not on the number of events.

Employee Productivity Favorites

Use the following pre-defined search favorites to display employee productivity statistics:

- Cost of Events
- Opportunities
- Productivity
- Profitability

Each of these search favorites is described in this section.

Cost of Events

The **Cost of Events** search favorite returns a subset of available columns, as described in the table below.

Column	Description/Formula
Hourly Wage	Latest wage entered if the wage has recently changed
Total Hours	(=Standard Hours + Overtime Hours)
Standard Hours	Number of hours worked up to 40 hours
Overtime Hours	Number of hours worked beyond standard hours
Total Wages	(=Standard Wages + Overtime Wages)
Standard Wages	(=Hourly Wage X Standard Hours worked)
Overtime Wages	(=Overtime Hours worked X Hourly Wage X 1.5)
Event Commission	(=Sum of all commission fees, completed and cancel-charged events)
Cost of Employee	(=Total Wages + Commission)

Opportunities

Opportunities are based on the number of members attending the event, not on the number of events. The **Opportunities** search favorite returns a subset of available columns, as described in the table below.

Column	Description/Formula
Opportunities	
Opportunity Hand Offs	# of opportunities handed off to a manager or sales rep
Opportunity Hand Off Rate	(=Opportunity Hand Offs/Opportunities)
Opportunities Sold	# of opportunity hand offs that resulted in sales
Opportunity Sold Rate	(=Opportunities Converted/Opportunities)

Productivity

The **Productivity** search favorite returns a subset of available columns, as described in the table below.

Note: This does not include cancel-charge events; it only includes completed events.

Column	Description/Formula
Events Completed	
Paid Events	
Comp Events	
% Paid	(=Paid Events/Events Completed)
% Comp	(=Comp Events/Events Completed)
Total Hours	(=Standard Hours + Overtime Hours)
Member Hours	Time spent with members in sessions (that is the sum of all hours put into completed events—does not include any cancelled or pending events).
Paid Member Hours	
Comp Member Hours	Comp (complimentary) means that the event was free and was not mapped to a service. If an event is mapped to a service but shows $0.00, it is not considered to be a Comp event.
Admin Hours	(=Total Hours worked - Member Hours)
% Member Time	(=Member Hours/Total Hours worked)
% Paid Member Time	(=Paid Hours/Total Hours worked)
% Comp Member Time	(=Comp Hours/Total Hours worked)
% Admin Time	(=Down Hours/Total Hours worked)
Distinct Members	
Retention Rate	This field uses the retention date range filter to identify the historical period (always last month) used in comparing numbers from period to period.
Cancel (no charge)	
Cancel (charge)	
Pending Count	
Total Events	(=Events Completed + Events Cancelled + Events Pending)
Booked Future Revenue (deferred revenue)	Pending paid appointments (future value snapshot, independent of date range)

Profitability

The **Profitability** search favorite returns a subset of available columns, as described in the table below.

Column	Description/Formula
Event Revenue	(=Sum of revenues accrued from events completed or cancel charged)
Cost of Employee	(=Total Wages + Training Commission)
Employee Gross Profit (contribution margin)	(=Event Revenue - Cost of Employee)
Employee Profitability % (contribution ratio)	(=Employee Profit/Event Revenue)

Employee Sales Favorites

Use the following pre-defined search favorites to display employee sales statistics:

- Cost of Sales
- Sales
- Sales Profitability

Each of these search favorites is described in this section.

Cost of Sales

The **Cost of Sales** search favorite returns a subset of available columns, as described in the table below.

Column	Description/Formula
Event Hours Sold	
Hourly Wage	Reflects the latest wage entered if the wage has recently changed
Future Event Wages	(=Event Hours Sold X Hourly Wage)
Future Event Commissions	(=Sum of future commissions for sessions sold)
Sales Commissions	
Cost of Sales	(=Future Event Wages + Future Event Commission + Sales Commission)

Sales

The **Cost of Sales** search favorite returns a subset of available columns, as described in the table below.

Column	Description/Formula
Total Sales Sale Amount	(=New Sales + Renewal Sales + Recurring Sales)
New Sale Sale Amount	Sales of events to members who have not previously purchased the same event type
Renewal Sale Sale Amount	Sales of events to members who have previously purchased the same event type
Recurring Sales Sale Amount	(=Recurring Sales Fixed Monthly + Recurring Sales Open Monthly + Recurring Sales Open Package)
Fixed Monthly Sale Amount	Package sales that automatically charge a fixed amount each month
Open Monthly Sale Amount	Package sales that automatically replenish used services on a monthly basis
Open Package Sale Amount	Package sales that automatically replenish used services based on package usage
Total Sales Sale Count	(=New Sales quantity + Renewal Sales quantity + Recurring Sales quantity)
New Sale Sale Count	Sales of events to members who have not previously purchased the same event type
Renewal Sale Sale Count	Sales of events to members who have previously purchased the same event type
Recurring Sales Sale Count	Replenishment of recurring packages
Average Sale Amount	(=Total Sales/Sales quantity)
Total Sales Session Count	Total number of events secured by sales
Average Session Amount	(=Total Sales/Sessions sold)

Sales Profitability

The **Sales Profitability** search favorite returns a subset of available columns, as described in the table below.

Column	Description/Formula
Total Sales Sale Amount	(=New Sales + Renewal Sales + Recurring Sales)
Cost of Sales	(=Future Event Wages + Future Event Commission + Sales Commission)
Sales Gross Profit (contribution margin)	(=Total Sales - Cost of sales)
Sales Profitability (contribution ratio)	(=Sales Profit/Total Sales)

Employee Productivity Goals Favorites

You can view goals reports for the current month/year which provides month-to-date information, or you can display values relative to a selected date range. Historical reports are compared with historical goals. On the first day of each month, the previous month's goals are converted to historical goals.

Use the following pre-defined search favorites to display employee productivity goals statistics:

- Event Revenue

- Opportunities

- Opportunity Handoff Rate

- Opportunity Sold Rate

- Percent Member Time

Each of these search favorites is described in this section. Each productivity goal has **Actual**, **Goal**, **Difference**, and **Percent** columns.

Event Revenue

The **Event Revenue** search favorite returns a subset of available columns, as described in the table below.

Column	Description/Formula
Sales per Profit Center	For input only, will be used in a reporting module
Compare to Actual Sales	
Event Revenue Goal (M)	
Compare to Actual Event Revenue	
Event Revenue Goal Diff	(=Event Revenue Goal - Event Revenue)
Event Revenue Goal %	(=Event Revenue/Event Revenue Goal)

(M) = Manually entered by the club

Opportunities

The **Opportunities** search favorite returns a subset of available columns, as described in the table below.

Column	Description/Formula
Sales per Profit Center	For input only, will be used in a reporting module
Compare to Actual Sales	
Opportunities Goal (M)	
Compare to Actual Opportunities	
Opportunities Goal Diff	(=Opportunities Goal - Opportunities)
Opportunities Goal %	(=Opportunities/Opportunities Goal)

(M) = Manually entered by the club

Opportunity Handoff Rate

The **Opportunity Handoff Rate** search favorite returns a subset of available columns, as described in the table below.

Column	Description/Formula
Sales per Profit Center	For input only, will be used in a reporting module
Compare to Actual Sales	
Opportunity Hand Off Rate Goal (M)	
Compare to Actual Opportunity Hand Off Rate	
Opportunity Hand Off Rate Goal Diff	(=Opportunity Handoff Rate Goal - Opportunity Handoff Rate)
Opportunity Hand Off Rate Goal %	(=Opportunity Handoff Rate/Opportunities Handoff Rate Goal)

(M) = Manually entered by the club

Opportunity Sold Rate

The **Opportunity Sold Rate** search favorite returns a subset of available columns, as described in the table below.

Column	Description/Formula
Sales per Profit Center	For input only, will be used in a reporting module
Compare to Actual Sales	
Opportunity Sold Rate Goal (M)	
Compare to Actual Opportunity Sold Rate	
Opp Sold Rate Goal diff	(=Opportunity Sold Rate Goal - Opportunity Sold Rate)
Opp Sold Rate Goal %	(=Opportunity Sold Rate/Opportunities Sold Rate Goal)

(M) = Manually entered by the club

Percent Member Time

The **Percent Member Time** search favorite returns a subset of available columns, as described in the table below.

Column	Description/Formula
Sales per Profit Center	For input only, will be used in a reporting module
Compare to Actual Sales	
% Member Time Goal (M)	
Compare to Actual % Member Time	
% Member Time Goal Diff	(=% Member Time Goal - % Member Time)
% Member Time Goal %	(=% Member Time/% Member Time Goal)

(M) = Manually entered by the club

Employee Profit Center Goals

The **Employee Profit Center Goals** tab does not have search favorites. You can simply perform a search by profit center. Each profit center that is selected has **Actual**, **Goal**, **Difference**, and **Percent** columns.

Column	Description/Formula
Total Sales Goal (C)	(=New Sales Goal + Renewal Sales Goal + Recurring Sales Goal)
Compare to Total Sales	
Total Sales Goal Diff	(=Event Revenue Goal - Event Revenue)
Total Sales Goal %	(=Event Revenue/Event Revenue Goal)
New Sales Goal (M)	
Compare to Actual New Sales	
New Sales Goal diff	(=New Sales Goal - New Sales)
New Sales Goal %	(=New Sales/New Sales Goal)
Renewal Sales Goal (M)	
Compare to Actual renewal Sales	
Renewal Sales Goal Diff	(=Renewal Sales Goal - Actual Renewal Sales)
Renewal Sales Goal %	(=Actual Renewal Sales/Renewal Sales Goal
Recurring Sales Goal (C)	(=Recurring Sales Open Monthly Goal + Recurring Sales Open Package Goal)
Compare to Actual Recurring Sales	
Recurring Sales Goal Diff	(=Recurring Sales Goal - Actual Recurring Sales)
Recurring Sales Goal %	(=Actual Recurring Sales/Recurring Sales Goal)
Recurring Sales Fixed Monthly Goal (M)	
Compare to Actual Recurring Sales Fixed Monthly	
Recurring Sales Fixed Monthly Goal Diff	(=Recurring Sales Fixed Monthly Goal - Actual Recurring Sales Fixed Monthly)
Recurring Sales Fixed Monthly Goal %	(=Actual Recurring Sales Fixed Monthly/Recurring Sales Fixed Monthly Goal)
Recurring Sales Open Monthly Goal (M)	
Compare to Actual Recurring Sales Open Monthly	
Recurring sales Open Monthly Goal Diff	(=Recurring Sales Open Monthly Goal - Actual Recurring Sales Open Monthly)
Recurring sales Open Monthly Goal %	(=Actual Recurring Sales Open Monthly/Recurring Sales Open Monthly Goal)

Column	Description/Formula
Recurring Sales Open Package Goal (M)	
Compare to Actual Recurring Sales Open Package	
Recurring Sales Open Package goal diff	(=Recurring Sales Open Package Goal - Actual Recurring Sales Open Package)
Recurring Sales Open Package goal %	(=Actual Recurring Sales Open Package/Recurring Sales Open Package Goal)
Average Sale Amount Goal (M)	
Compare to Actual Average Sale Amount	
Average Sale Amount Goal Diff	(=Average Sale Amount Goal - Actual Average Sale Amount)
Average Sale Amount Goal %	(=Actual Average Sale Amount/Average Sale Amount Goal)
Recurring Revenue Goal (M)	
Compare to Actual Recurring Revenue Total	
Recurring Revenue Goal Diff	(=Recurring Revenue Goal - Actual Recurring Revenue)
Recurring Revenue Goal %	(=Actual Recurring Revenue/Recurring Revenue Goal)

(C) = Calculated by DataTrak

(M) = Manually entered by the club