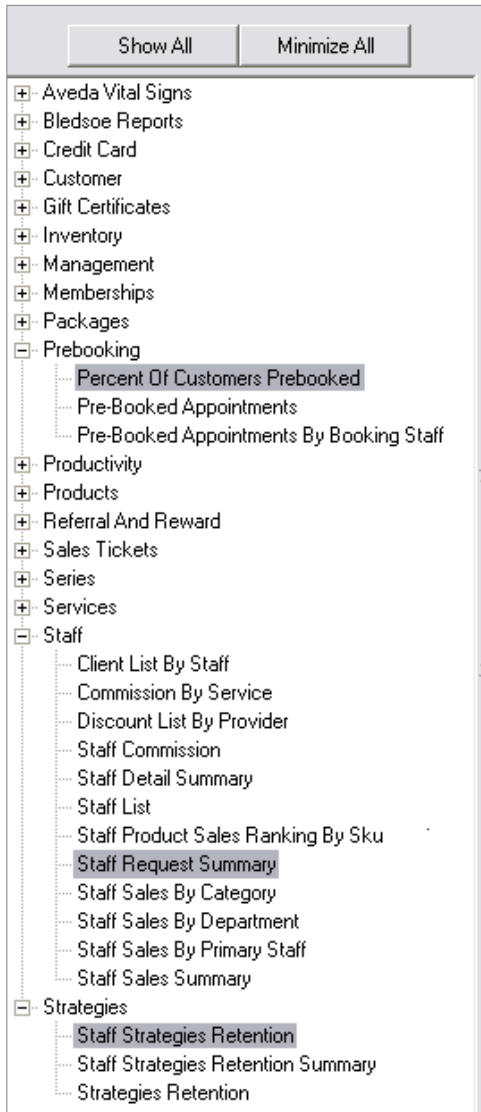


# coaching reports

Use this guide as a reference tool for the top staff coaching reports.



## Staff Request Summary Report

*The Staff Request report lists every request type for each individual staff member. Giving total quantity and revenue generated for each request type.*

1. From the SalonBiz®/SpaBiz® menu bar, click on the Reports icon.
2. Double click on Staff Request Summary from the report list side navigation. You will find it under the Staff category.
3. Enter the date range for the report.

## Percent Of Customers Prebooked Report

*A pre-booked appointment is defined as a future appointment that was reserved by the client on the same day that they had an appointment in the location. This report will show how many appointments were pre-booked for a day or date range.*

1. From the SalonBiz®/SpaBiz® menu bar, click on the Reports icon.
2. Double click on Percent Of Customers Prebooked from the report list side navigation. You will find it under the Prebooking category.
3. Enter the date range for the report.

## Pre-Booked Appointments By Booking Staff Report

*The PreBooked Appointments by Booking Staff report is a great awareness tool for the front desk staff.*

1. From the SalonBiz®/SpaBiz® menu bar, click on the Reports icon.
2. Double click on Pre-Booked Appointments by Booking Staff from the report list side navigation. You will find it under the Pre-Booking category.
3. Enter the date range for the report.

## Staff Strategies Retention

*The Staff Strategies Retention report provides you with information on new client retention as well as existing client retention details for the entire salon/spa and each service staff member for a specific date range.*

1. From the SalonBiz®/SpaBiz® menu bar, click on the Reports icon.
2. Double click on Staff Strategies from the report list side navigation. You will find it under the Strategies category.
3. Enter the date range.
4. Enter an ending date for the retention period.
5. Select staff to view.
6. Click the Ok button.



### **Staff Strategies Retention Summary**

*The Staff Strategies Retention Summary report lists the information from the Staff Strategies Retention report in summary form.*

1. From the SalonBiz®/SpaBiz® menu bar, click on the Reports icon.
2. Double click on Staff Strategies Retention Summary from the report list side navigation. You will find it under the Strategies category.
3. Enter the date range.
4. Enter an ending date for the retention period.

### **Strategies Retention**

*The Strategies Retention report provides an overall salon retention summary.*

1. From the SalonBiz®/SpaBiz® menu bar, click on the Reports icon.
2. Double click on Strategies Retention from the report list side navigation. You will find it under the Strategies category.
3. Enter the date range.
4. Enter an ending date for the retention period.

