



The Whiteboard is designed to focus the team on behaviors that will build their business. Throughout the day, the Whiteboard will automatically update (every 5 minutes) to display results for key metrics. By providing staff their results and goals, you will see improvements on their daily performance. In addition, they can flip their column over to see their schedule for the day – reducing interruptions at the front desk.

Real-time metrics on business drivers = real-time results.

Channels

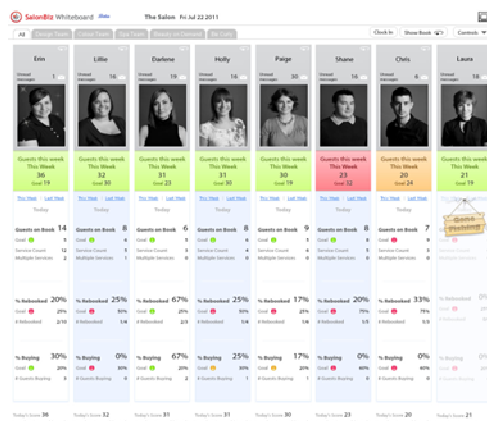
When Administrators/Managers login they can select any location from the list of company locations. They can also select which Whiteboard channel they would like to view:

- Guest - uses guest count as the weekly metric
 - Revenue - uses service and retail sales as two of the metrics
 - Enterprise - multi-location view of all locations
- ❖ The system defaults to the Guest Channel - this is our best practice recommendation.

Whiteboard Options

- Select your default Whiteboard channel: **Guest Count**
 - Choose your key performance driver
 - Select your weekly metric: **Service + Retail**
 - Choose from service revenue or service + retail revenue
 - Select an additional metric to display: **% Rebooked**
 - Choose another metric to display in addition to your service and retail revenue metrics
 - Select your average retail ticket metric: **RPST**
 - Choose from Retail per Client Ticket or Retail per Service Ticket
- Select the column you would like to use to rank staff: **Guests This Week**
 - Select the metric to order staff display from left to right on the Whiteboard
 - The system defaults to your weekly metric. To choose a daily metric, select a metric from the list below.
- Display Rolling Goals:

Launch Whiteboard



Guest Channel

The system looks at service tickets processed for past appointments along with future appointments for that staff member to calculate this metric with accuracy.

Calculations

- **Guests This Week** - the number of unique guests per day
- **Guest Visits This Week** = the actual number of unique client visits to date (that have already taken place) + number of future clients on the book through the end of the week for the staff member
- **Guests on the Book** = the number of unique clients on the staff member's book today
- **Service Count** = the number of services for the staff member
- **Multiple Services** = the number of clients who have more than one service with that provider
- **% Rebooked** = percent of anyone who had a service today with a processed ticket and who rebooked a service in the future today. $(\#staff \text{ rebooks} / \#svc \text{ visits}) \times 100$
- **# Rebooked** = the number of clients on the staff member's book today that rebooked or already had a future appointment booked
- **% Buying** – number of clients with a service that also purchased retail. $(\#services \text{ sold with product} / \#svc \text{ tickets}) \times 100$
- **# Buying** = the number of clients on the staff member's book today that purchased product

Ranking Options

Weekly Metrics

Guests This Week

Service Sales This Week

Service + Retail Sales This Week

Ticket Averages

RPST - Retail per service ticket

RPCT - Retail per client ticket

SPST - Service per service ticket

Daily Stats

Guests on Book

Multiple Services/Guest

% Guests Rebooked

Guests Rebooked

% Guests Buying

Guests Buying

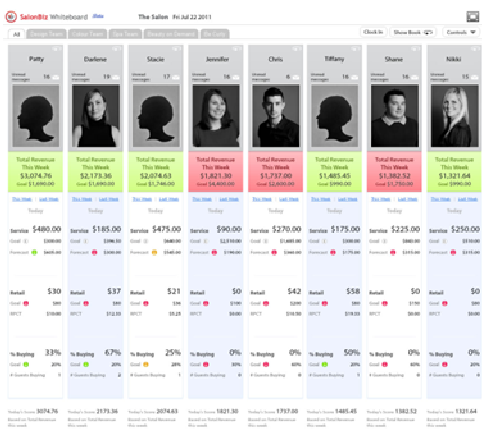
Retail Sales

Service Sales

Whiteboard Options

- Select your default Whiteboard channel
Choose your key performance driver
Revenue
- Select your weekly metric
Choose from service revenue or service + retail revenue
Service + Retail
- Select an additional metric to display
Choose another metric to display in addition to your service and retail revenue metrics.
% Rebooked
- Select your average retail ticket metric
Choose from Retail per Client Ticket or Retail per Service Ticket
RPST
- Select the column you would like to use to rank staff
Select the metric to order staff display from left to right on the Whiteboard
The system defaults to your weekly metric. To choose a daily metric, select a metric from the list below.
Service + Retail Sales This Week
- Display Rolling Goals

Launch Whiteboard



Service Goal

Service Goal:	\$250.00
Rolling Goal:	\$250.00
Working Days Left:	2
Overall Goal:	\$375.00

OK

Revenue Channel

In the Revenue channel view, Forecast indicates services on the book today. It is a dynamic number thus it takes the value of service tickets checked out and adds it to the book value of appointments not checked out. For the non-checked out appointments it calculates value based on client custom price for the service, if there isn't one, then looks at the staff member's price for service. If both of those are not present, it takes the default price for that service that is set up in the service file in SalonBiz.

Rolling Goals

Rolling goals are available and are an optional setting set up by the Administrator/Manager in Whiteboard Settings. By default they are turned on with the revenue channel. The calculation is:

- Actual Service Sales - Goal = Rolling Goal
 - The rolling goal amount is then divided among the number of remaining working days for the staff member that week. This will increase the staff member's daily goal and is noted with the "i" icon on the Whiteboard.

Calculations

- Service Forecast This Week = the actual amount of service sales to date (that have been processed) + amount of service sales on the book through the end of the week for the staff member.
- Total Revenue This Week = Service + Retail as selected for your forecast option. The actual amount of service sales to date + the amount of service sales on the book and the retail goal for that staff member for the week. (If no goal set, RPST is used for the number of appointments on their book.)
- Retail Revenue This Week
- Total Revenue This Week
- % Booked – Percent booked for service, the amount of time you are available for appointments and then looks at the time you are booked. (hours booked / hours available – blocked hours x 100)
- SPST (Service per service ticket) – total service dollars / total number of service tickets
- RPST (Retail per Service Ticket) – total product sales on service tickets / total number of service tickets
- RPCT (Retail per Client Ticket) – total product dollars / total number of tickets

Ranking Options

Weekly Metrics

- Guests This Week
- Service Sales This Week
- Service + Retail Sales This Week

Ticket Averages

- RPST - Retail per service ticket
- RPCT - Retail per client ticket
- SPST - Service per service ticket

Daily Stats

- Guests on Book
- Multiple Services/Guest
- % Guests Rebooked
- # Guests Rebooked
- % Guests Buying
- # Guests Buying
- Retail Sales
- Service Sales

Whiteboard Options

- Select your default Whiteboard channel: **Enterprise**
 Choose your key performance driver: **Service + Retail**
 Select your weekly metric: **Service + Retail**
 Choose from Service Revenue or Service + Retail Revenue
 Select an additional metric to display: **% Rebooked**
 Choose another metric to display in addition to your service and retail revenue metrics
 Select your average retail ticket metric: **RPST**
 Choose from Retail per Client Ticket or Retail per Service Ticket
- Select the column you would like to use to rank staff: **Service + Retail Sales This Week**
 Select the metric to order staff display from left to right on the Whiteboard
 The system defaults to your weekly metric. To choose a daily metric, select a metric from the list below
- Display Rolling Goals:

Launch Whiteboard

Location #1	Location #2	Location #3	Location #5	Location #6	Location #7	Location #8
Service Forecast This Week: \$8,819.00	Service Forecast This Week: \$1,855.00	Service Forecast This Week: \$21,208.00	Service Forecast This Week: \$4,323.00	Service Forecast This Week: \$3,541.00	Service Forecast This Week: \$257.00	Service Forecast This Week: \$0.00
Service: 5939.00	Service: \$1,855.00	Service: \$4,120.00	Service: \$4,323.00	Service: \$3,541.00	Service: \$257.00	Service: \$0.00
Retail: \$286	Retail: \$907	Retail: \$594	Retail: \$895	Retail: \$890	Retail: \$213	Retail: \$0
Guests on Book: 43	Guests on Book: 52	Guests on Book: 99	Guests on Book: 127	Guests on Book: 88	Guests on Book: 14	Guests on Book: 0
% Rebooked: 0%	% Rebooked: 0%	% Rebooked: 0%	% Rebooked: 0%	% Rebooked: 0%	% Rebooked: 0%	% Rebooked: 0%
% Buying: 20%	% Buying: 17%	% Buying: 20%	% Buying: 18%	% Buying: 21%	% Buying: 33%	% Buying: 0%

Enterprise Channel

The Enterprise channel view is only available to Administrators/Managers. In the Enterprise channel view, you will see all of your locations' metrics next to each other. It uses the Service Forecast as the Weekly Metric.

Each location will have the following metrics:

- Service Sales
 - Forecast
 - #Service Tickets
 - \$ on Service Tickets
- Retail Sales
 - RPST
 - RPCT
 - RPRT
- Guests on Book
 - Service Count
 - Multiple Services
- % Rebooked
 - # Rebooked
- % Buying
 - # Guests buying

To drill down into each location, simply click the Show button on the location column and that location's Whiteboard will be displayed.

- ❖ Rolling goals are not available in Enterprise view.
- ❖ The Enterprise view will display a 'Gone Fishing' sign if it is closed that day.

Ranking Options

Weekly Metrics

- Guests This Week
- Service Sales This Week
- Service + Retail Sales This Week

Ticket Averages

- RPST - Retail per service ticket
- RPCT - Retail per client ticket
- SPST - Service per service ticket
- RPRT - Retail per retail ticket

Daily Stats

- Guests on Book
- Multiple Services/Guest
- % Guests Rebooked
- # Guests Rebooked
- % Guests Buying
- # Guests Buying
- Retail Sales
- Service Sales