

Stress-Free Software Migration

Switch to Zen Planner

Upgrade with Zen Planner—grow smarter from day one

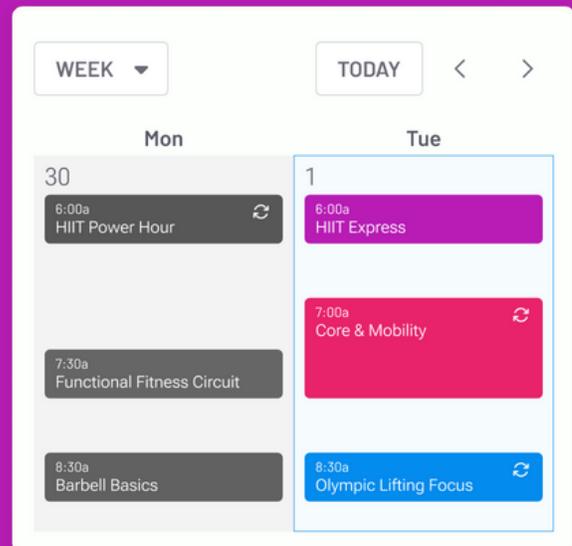
Zen Planner simplifies your transition with fully guided setup, seamless data migration, and expert coaching, so you can focus less on admin and more on growing your community stress-free.

Guided onboarding led by a team of experts

Switching to Zen Planner is designed to be stress-free. Our implementation team handles the heavy lifting, so you don't have to.

We set up your core operations

- Memberships
- Payment processing
- Class schedules & bookings
- Staff accounts
- Access roles
- Reporting & dashboards
- Key workflows



Once your system is ready, we'll schedule your first one-on-one session with your Customer Success Coach within 1 week of go-live.

Your data. Fully transferred. Nothing lost.



Member information, fully preserved

Student profiles, contact details, and member records move over without a hitch, so you don't lose touch with a single member.



Progress & attendance history intact

We transfer current memberships and attendance history so your members' progress remains complete and uninterrupted.



Expert-led setup, start to finish

Our team handles your migration from end to end. No manual re-entry, no lost data, no guesswork. Just a clean, complete transition.

"I couldn't believe how easy it was to move my information over and get started. My onboarding coach was incredible. Even with the learning curve, I started saving time right away because all my tasks were so much easier."

Lester Hicks, Chosen Martial Arts Academy



No disruptions to your member payments



Seamless payment data transfer

We securely migrate your members' payment information, including credit card and ACH details, so you don't need to re-enter or revalidate data.



Security you can trust

Our implementation specialists follow industry-standard compliance and encryption to ensure your data stays safe and accurate.



No member action required

Your members won't need to re-enter their billing information or take any action. Their payments will continue running smoothly behind the scenes.

Your personalized onboarding timeline

Step 1 Pre-build setup

Before our first call, your Implementation Specialist builds your account using your business specifics: memberships, class types, appointments, and more.

Step 2 Data migration

We securely migrate your critical data—like client profiles, memberships, attendance records, and payment details—so billing continues smoothly. No interruptions, no lost payment info, and no action needed from your members. Just send us your data in CSV format and we handle the rest.

Step 3 2-hour live walkthrough

Once your system is set up, your Implementation Specialist will review your fully set-up database with you. Then, you'll be trained on all the day-to-day operations & workflows (member management, reservations and check-ins, payment processing, signing up new clients, client communication).

Step 4 Online experience setup

We'll help you integrate Zen Planner into your website so members can take action without friction. Our tools include online class calendars and booking, free trial registration forms, new member sign-up flows, and lead capture widgets.

Step 5 Ongoing business coaching & support

With your systems running smoothly and your team and members fully connected, your Customer Success Manager (CSM) becomes your strategic growth partner. You'll receive expert coaching on fitness business best practices, tailored strategies to support your unique goals, and a trusted resource for ongoing questions and software support.

235% member growth in 1 year

"We redid all of our automations, all of our memberships, and built custom reports within Zen Planner... Things just took off like a rocket ship."

Matt Klinger, Village Fitness



10-12 hours saved per week

"We spent 1 year assessing 19 different systems before settling on Zen Planner. It's been really effective in making sure all of our schools are on the same page and helped us out massively with our POS and retail. It's really saved us about 10-12 hours a week per location."

Dave Kovar, Kovar Martial Arts & Kovar's Systems



4x growth and 25% time saved

"Zen Planner has freed up 25% of my time allowing me to focus on business growth and quadruple my business... Zen Planner has saved me roughly \$84,000 a year in lost revenue."

Jennifer Searles, The Works Personal Training Center



**Explore more
success stories
from real gym
owners**

Your dedicated customer success coach – the first 90 days

From your first day, your Customer Success Manager (CSM) becomes an extension of your team. They're here to help you make the most of Zen Planner and scale your business with confidence.

First 30 days

Build your foundation

Launch with a clear, actionable plan tailored to your goals.

Day 60

Optimize & automate

Your coach helps you streamline operations, automate admin, and deliver better experiences.

Day 90

Scale with confidence

Work on growth strategies like member retention and service expansion.

Ongoing success, beyond onboarding

We're still here after your first 90 days to help you keep growing with confidence. From advanced feature support to long-term strategy, your success remains our priority.

Day 120

Check-in

Unlock powerful tools like advanced reporting, marketing automation, and financial insights.

6 Months

Strategy session

Plan long-term growth—multi-location scaling, retention campaigns, and new service offerings.

Ongoing

Continued support

Our team is always here to offer expert support, fresh ideas, and proactive check-ins to keep your business moving forward.

Communicating the switch to your clients and staff

Switching systems is a big step—but communicating the change clearly can make all the difference. We'll help you get your team and members excited, not anxious.

Communicating with staff

Involve them early: Let them know why the switch is happening and how it helps them.

Highlight benefits: Less manual work, faster check-ins, better visibility into member activity.

Use Zen Academy: Give them access to training videos and walkthroughs to build confidence fast.



Communicating with members

Share the why: Send a simple “What’s New” email outlining what’s changing (and why it’s better).

Reassure them: Their payment info stays the same and their experience is only getting easier.

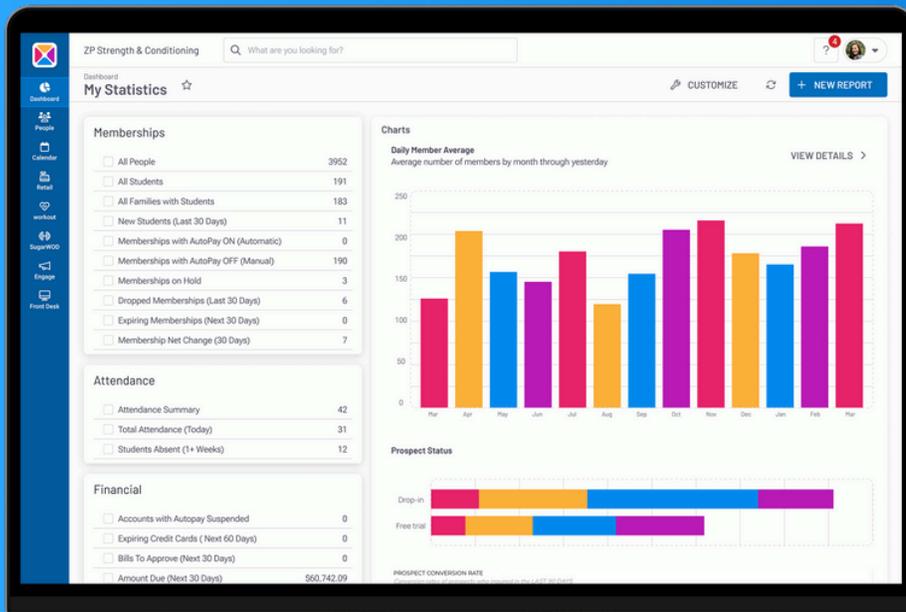
Use the member app: Link to the Zen Planner member app and explain the benefits—like booking classes in a few taps.

You deserve a partner, not just a platform

Your members are the heart of your business.

Zen Planner helps you serve them better with software that works for you and that you're confident in every step of the way.

Ready to switch gym management software with ease?
Let's grow your business together—from day one.



See it in action

Scan to request
your demo



Award-winning software that makes switching worth it

