

## Note:

The following slides are selected **excerpts from a larger presentation deck.**

**Content has been modified** and anonymized to preserve confidentiality.

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# BUSINESS STRATEGY

CO-CREATION READOUT

SALESFORCE PROFESSIONAL SERVICES



# Principles of Persona Development

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Personas are abstractions that describe a specific user or group of users, their goals, needs, and behaviors

Personas don't change over time; they are designed to last for the next 5-10 years

Some key factors that differentiate personas are goals, success metrics, accountabilities, and journey

Personas are designed to address 95% of use cases, with the understanding that there will be outliers

Personas are not aligned 1:1 with roles; a role may move between personas as it does its work

Personas are not job titles, therefore job titles are often not used to name them

# It is vital that we understand the people we're designing for.

To deliver a solution that users will want and find useful, we need insight into their behaviors, needs, and goals.

Across Equinox we discovered several personas for customers and employees as we explored the end-to-end Equinox experience.

To ensure our approach to agents served the Equinox community, **we used these personas to define how AI agents could serve every person at each phase of their experience....**



# Equinox Employee Personas



**SALES ADVISOR**



**ACCOUNT EXECUTIVE**



**SALES MANAGER**



**SPA/PT/PILATES LEADER**



**OPERATIONS LEADER**



**CLUB GENERAL MANAGER**

	<b>SALES ADVISOR</b>	<b>ACCOUNT EXECUTIVE</b>	<b>SALES MANAGER</b>	<b>SPA/PT/PILATES LEADER</b>	<b>OPERATIONS LEADER</b>	<b>CLUB GENERAL MANAGER</b>
<b>DESCRIPTION</b>	Sells memberships & ancillary “products” inside the club	Sells corporate memberships	Sells individual and corporate memberships, manages the sales advisors	Manage sales and staffing in their area	Responsible for operations globally	Responsible for P&L for their specific club
<b>GOALS</b>	<ul style="list-style-type: none"> <li>Base + bonus on sales + club bonus overall</li> </ul>	<ul style="list-style-type: none"> <li>Base + bonus on sales + club bonus overall</li> </ul>	<ul style="list-style-type: none"> <li>Base + commission + Club Commission</li> </ul>	<ul style="list-style-type: none"> <li>Sell their respective products</li> </ul>	<ul style="list-style-type: none"> <li>Keep operations running</li> <li>Find efficiencies</li> </ul>	<ul style="list-style-type: none"> <li>Increase sales numbers</li> <li>Maintain quality of club experience</li> </ul>
<b>NEEDS &amp; ACTIVITIES</b>	<ul style="list-style-type: none"> <li>Follow up on leads to get referrals</li> </ul>	<ul style="list-style-type: none"> <li>Hold events at company or club to generate leads in person</li> <li>Work with each company to negotiate a plan and rate</li> <li>Differs from company to company</li> <li>Internal platform for benefits</li> </ul>	<ul style="list-style-type: none"> <li>Manage the sales team</li> <li>Manage quality of sales delivered - sales training, systems training</li> <li>Sell as well</li> <li>Can sell individual + corporate</li> </ul>	<p><b>Personal Training</b></p> <ul style="list-style-type: none"> <li>Engage people into “EquiFit” assessment</li> <li>Then comp PT session</li> </ul> <p><b>Pilates Assessment</b></p> <ul style="list-style-type: none"> <li>Fill out an intake form and discuss needs</li> <li>Comp pilates - instructor will use one of four pieces of equipment</li> </ul> <p><b>Spa</b></p> <ul style="list-style-type: none"> <li>No free session, do their best to entice members with discounts to first session</li> </ul>	<ul style="list-style-type: none"> <li>Look at case data</li> <li>Look at NPS data through surveys</li> <li>Look at what people are saying - why did they cancel?</li> <li>Oversee the concierge</li> <li>Manage ad hoc things</li> <li>Oversee sales operations and club operations to find efficiencies and determine how to operate</li> </ul>	<ul style="list-style-type: none"> <li>No broken equipment</li> <li>Oversee facility</li> <li>General operation - understand members, see members</li> <li>Use 5 point model</li> </ul>
<b>NOTES</b>		<ul style="list-style-type: none"> <li>40% of sales are corporate</li> <li>Use accounts and corporate contacts</li> </ul>				

# CLUB MANAGER

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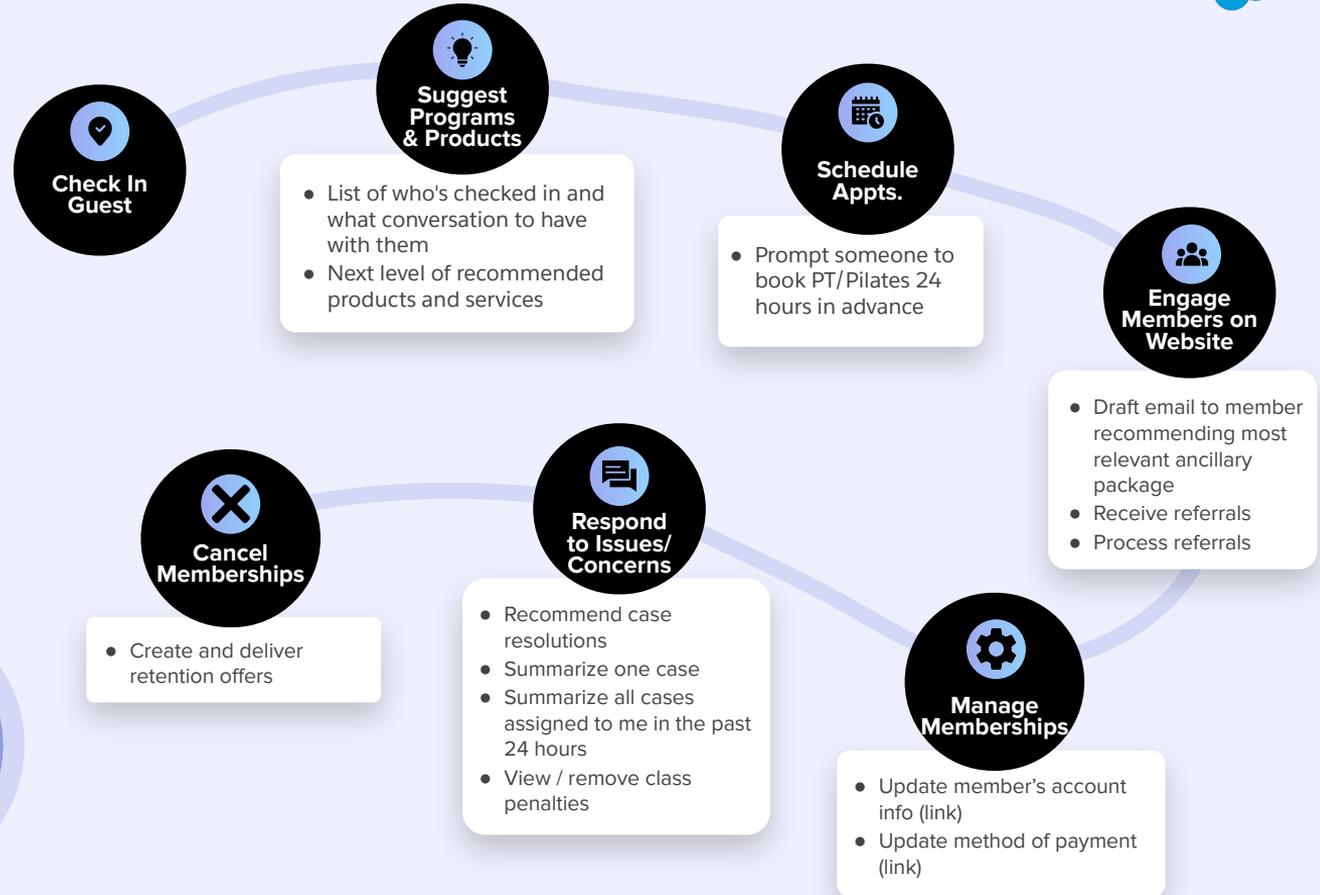
**SELLS INDIVIDUAL & CORPORATE MEMBERSHIPS;  
MANAGES SALES ADVISORS**

## GOALS

- Base + commission + Club commission

## NEEDS & ACTIVITIES

- Manage sales team
- Manage quality of sales delivered (sales training, systems training)
- Sell as well
- Can sell individual + corporate



# Equinox Customer Personas



**PROSPECT**



**MEMBER**



**DIGITAL SUBSCRIBER**



**SPA GUEST**



**HOTEL GUEST**



**ONLINE SHOPPER**

**DESCRIPTION**

**Pre-Sales, potential customers**

**Post-sales, current users of club locations**

**Users of virtual services on app - Soulcycle, video, etc. (3,00 Amex subscribers)**

**Customers who use spa services but may or may not members**

**Guests staying at the Equinox Hotel**

**People who purchase products on the app**

**GOALS**

- Decide whether or not to join/rejoin Equinox

- Get the most out of the membership  
- Look good, feel good

- Look good, feel good  
- Stay active  
- De-stress  
- Get the most out of the membership

- Relax  
- feeling your best in your fitness routine and life  
- fitness recovery

- extension of other goals  
- recovery / fitness

- Buy for themselves or someone else  
- Buy high quality, luxury brands that are not easy to get (co-branded)  
- Feel in-the-know, have the cool stuff

**NEEDS & ACTIVITIES**

- Information about clubs in the area  
- Information about membership cost and benefits  
- Book a visit to a club

- Convenient location  
- Check in seamlessly  
- Training  
- Seamless, easy experience  
- luxury is supposed to be simple  
- Build my community, make friends and contacts depending on club & vibe  
- Timing of classes  
- Social referrals - bring friends

- Timing of classes  
- On-demand training

- Get a facial  
- Red light masks  
- Luxury experience  
- Body work that is recovery/regeneration  
- Injury therapy

- IV therapy - nurse can visit your room  
- Supplements and products in hotel room  
- "The fittest hotel in the world"  
- Top 2 hotels in the world

# MEMBER

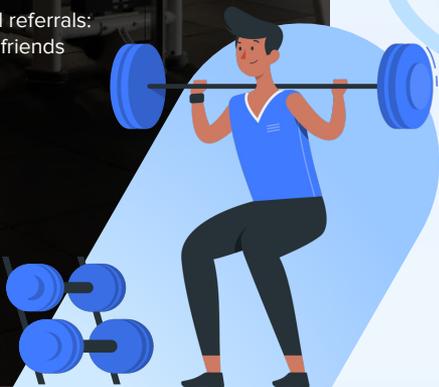
## POST-SALES, CURRENT CLUB LOCATION USERS

### GOALS

- Get the most out of the membership
- Look good, feel good

### NEEDS & ACTIVITIES

- Convenient location
- Seamless check-in
- Training
- Seamless, easy experience – luxury is supposed to be simple
- Build my community, make friends and contacts depending on club & vibe
- Timing of classes
- Social referrals: bring friends



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#### Member Onboarding

- Explain what Equifit is
- Schedule my Equifit
- Reschedule my Equifit
- Cancel my Equifit appointment

#### EQUINOX+ APP

- Reactivate app account
- Reset password
- Set favorites



#### Schedule Appts.

- View my class schedule (enhanced)
- View my scheduled sessions
- Book my favorite class for me
- Automatically identify favorite classes
- What is class x like?
- Schedule a PT session
- Reschedule a PT session
- Cancel a PT session
- View PT sessions remaining
- How do I do my comp training?
- Where is my training program?
- Reschedule a PL session
- Cancel a PL session
- See PL sessions remaining
- Explain comp PLs, how to use them
- Book Spa service
- Rebook my Spa service
- Cancel my Spa service
- View my remaining spa credits
- View my comp spa credits
- View spa promotions



#### Access Account Info & Prefs.

- View membership details
- View current access level
- View clubs I can go to
- View if I have club access
- See store credit balance
- See sign-up credit balance
- See gift card balance
- Buy a gift card
- Convert my gift card
- Problems with gift cards
- View account balance
- View my payment info
- Change payment method (link)
- Make a payment (link)
- Check status of my payment
- Download my payment receipts
- Download my transaction history
- Download my check-in history
- View/change my billing date
- Update auto-renew settings for club
- Update auto-renew settings for PT



#### Track Progress

- Summarize weekly/monthly progress
- Workout Summary
- Activity history
- Club visit history
- EquiFit assessment
- Body Scans
- Celebrate milestones
- Request consultation to improve
- Identify workout trends and insights
- Suggest next best exercises to try
- Celebrate trends, improvement



#### Work Out

- Locate equipment
- Suggest alternate machines
- Capture trainer comments



#### Check In

- Plan club trip
- Know what I've done and show me classes, amenities, clubs I might want to try
- Suggest alternate machines
- Parking information for club
- What should I bring?
- Library of workouts for me
- Pre-workout stretching recos
- Post-workout recovery recos
- Class recommendations
- Complex class recommendations



#### Prepare for Gym Visit



#### Post-Sale Upsell/Cross-Sell

- Recommend classes, exercises, spa, treatments, amenities
- Explain referral process
- Make a Club referral
- Make a Spa referral
- Check status of referral
- Check referral reward
- View PL promotions
- Link to buy more PL sessions/bundles/promotions
- Explain how to use hotel discount
- View hotel locations
- Link to page to book a room



#### Personalized Comms. & Marketing

- Identify members at risk of leaving and attempt to re-engage



#### Inquiry/Issue Resolution

- Request my penalties
- Request penalty removal
- How many guest passes do I have?
- How do I request/buy more passes?
- New or enhanced FAQs
- Can I have a trial pass to try Club X?
- Can I purchase a day pass to Club X?
- Request to have online password reset
- Request to switch trainer
- New/enhanced FAQs
- Submit invoice problem
- Submit PT billing issue
- Submit PL billing issue

#### EQUINOX+ APP

- SoulCycle Bike SUPPORT
- Troubleshoot / help with app



#### Feedback & Suggestions

- Give contact info for club managers
  - Hours for courts, amenities in a club
  - Share feedback on club, classes, staff
  - Report broken equipment
  - Report issues with staff, club, etc.
  - Give kudos to good staff, instructors
- #### EQUINOX+ APP
- Report suggestion or bug

# OUR PROCESS



# Product Collaboration

## KEY MILESTONES

- ✓ Conducted **Equinox Onsite Agentforce Enablement sessions** focusing on best practices and guidelines
- ✓ Enabled **Rich User Experiences**
- ✓ Performed a **detailed analysis and report on Pre-Sales Agent performance**
- ✓ **Dedicated high-touch support** for daily operations and critical observations

## FEATURES RELEASED

- MIAW Markdown Support (Rich Content)
- Token Streaming
- Progress Indicator

## FEATURES CONSUMED

- MIAW Markdown Support (Rich Text)
- Token Streaming
- Progress Indicator
- AI Assist

# Product Collaboration

## UPCOMING FEATURES & NEXT STEPS

### **Agent Guardrails & Instruction Adherence**

*Target Implementation: Week of March 24th*

### **Tableau Integration for Agent Analytics**

*Target Implementation: Week of March 24th*

### **Enhanced monitoring of Pre and Post Sales Agent Performance to deliver deeper insights**

### **Refinement of Instructions to optimize response accuracy**

### **Agentforce Roadmap Review**

*Scheduled for March 27th*



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THANK  
YOU.

