Phorest

Staff Goals & Commissions

Watch the recording

Phorest

- My Numbers
- My Goals and Viewing Progress
- Expert Recommendations
- Reporting
- Commission structures

Phorest

My Numbers

On PhorestGo > click the menu icon > My Performance

Help Sheet:
What is Staff Performance (Phorest Go)?

10:11 Mon 29 May

100%

My Performance

My Numbers

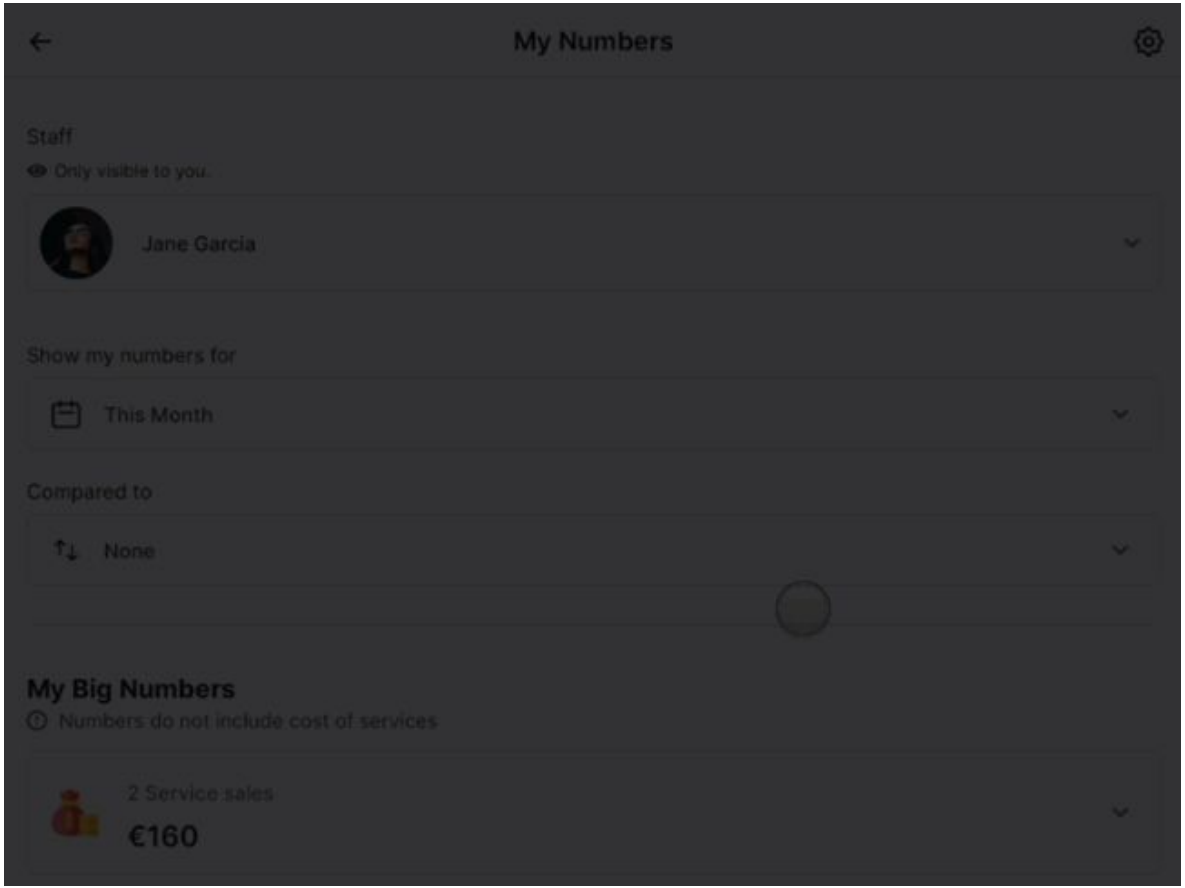
Monitor and compare your key performance numbers

My Goals

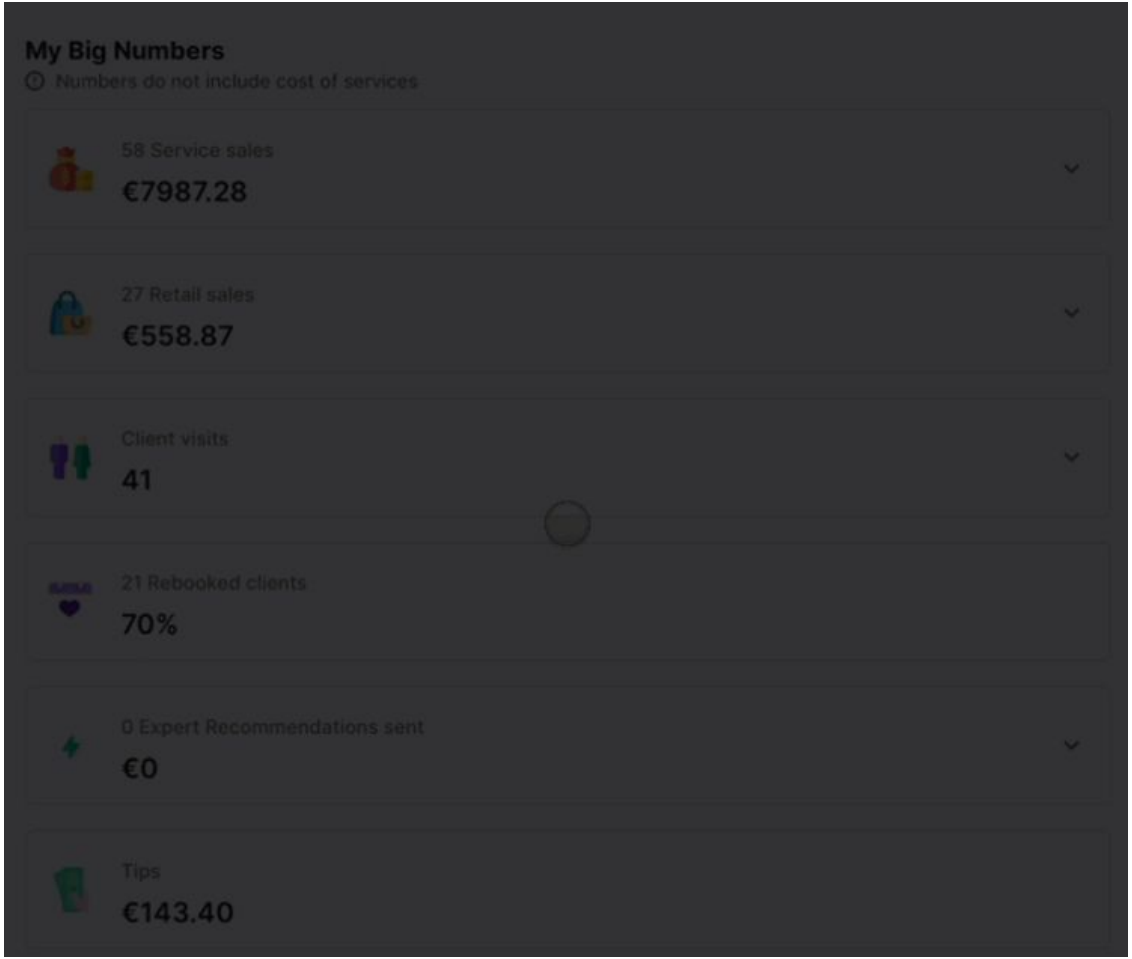
Create, track and hit personal goals

FAQs

Your top questions answered



Click the Staff dropdown menu to select the staff member name



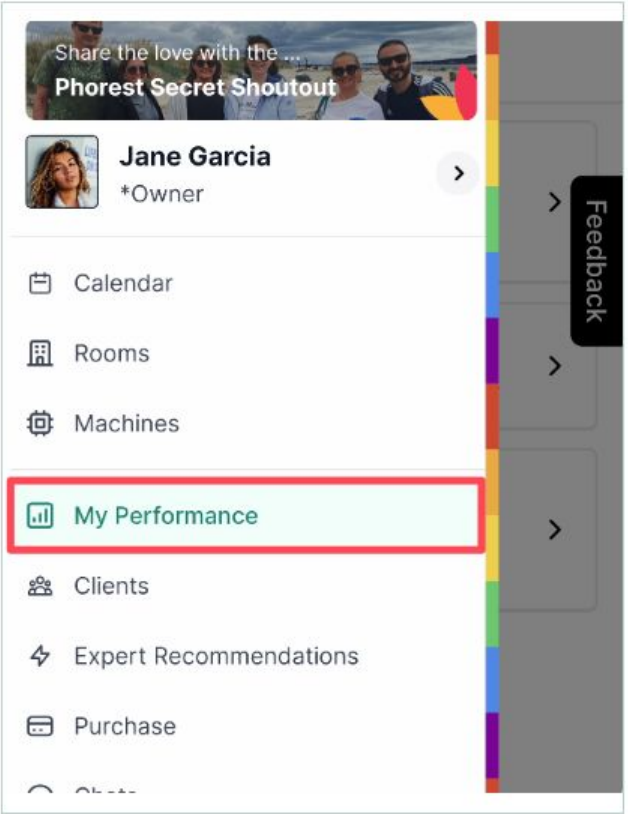
Click to view the different sections to view the staff numbers

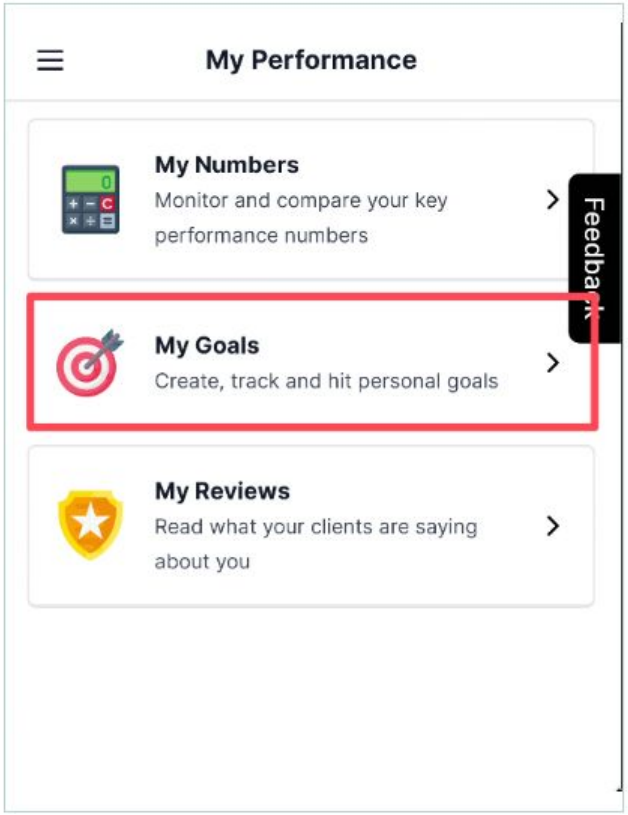
Phorest

Staff Goals

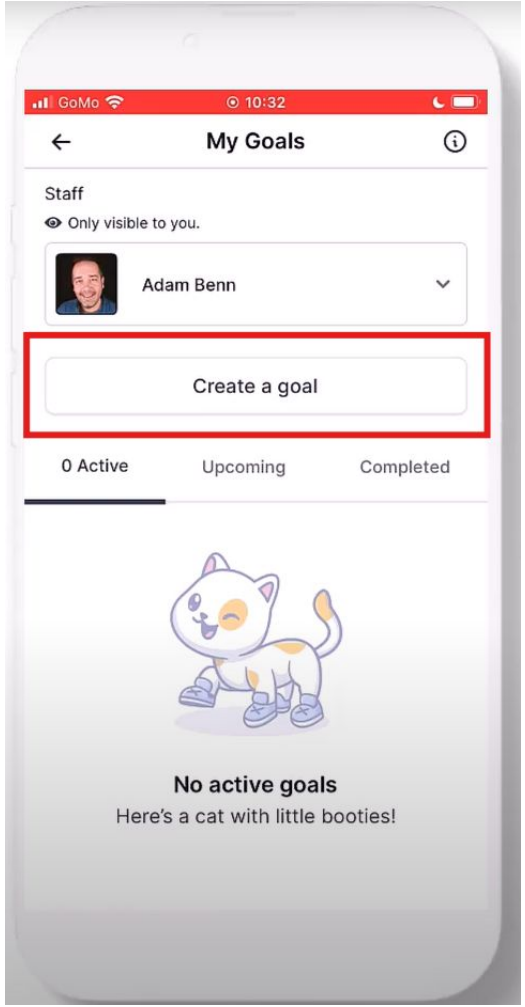
On PhorestGo > click the menu icon > My Performance

Help Sheet:
How can I set up Goals for my staff in PhorestGo? – Phorest

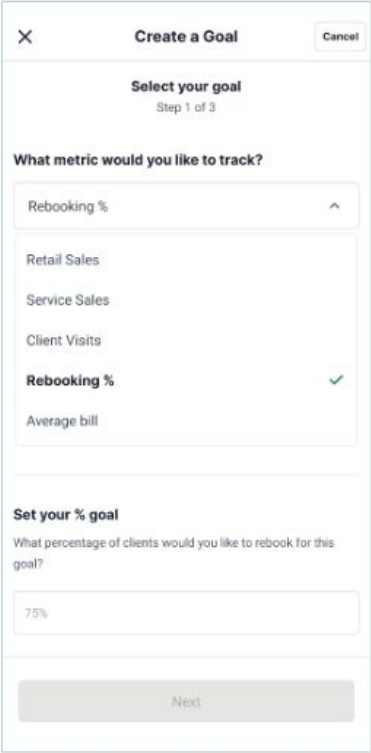


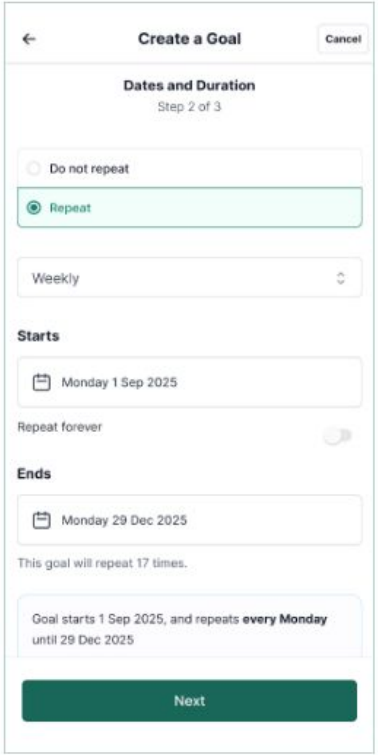


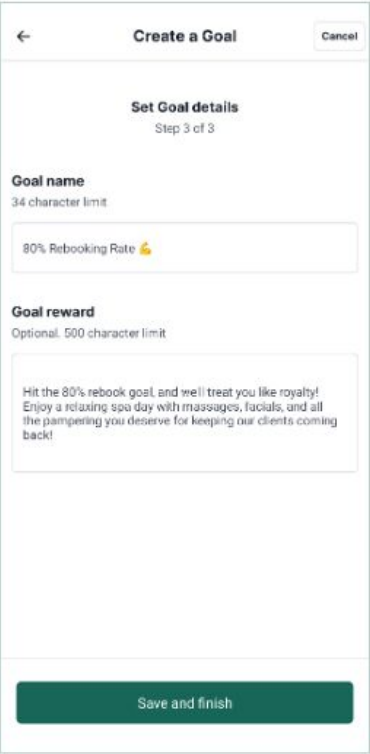
Creating a Goal:
Click My Performance > My Goals in PhorestGo > Create a goal



Click "Create a goal"

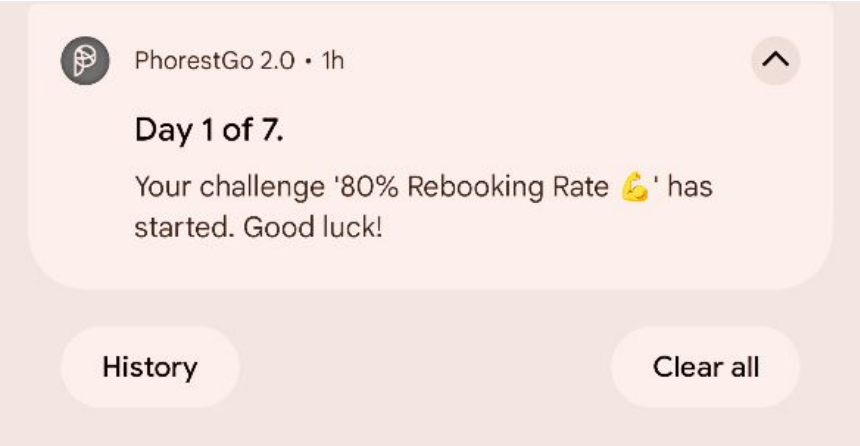




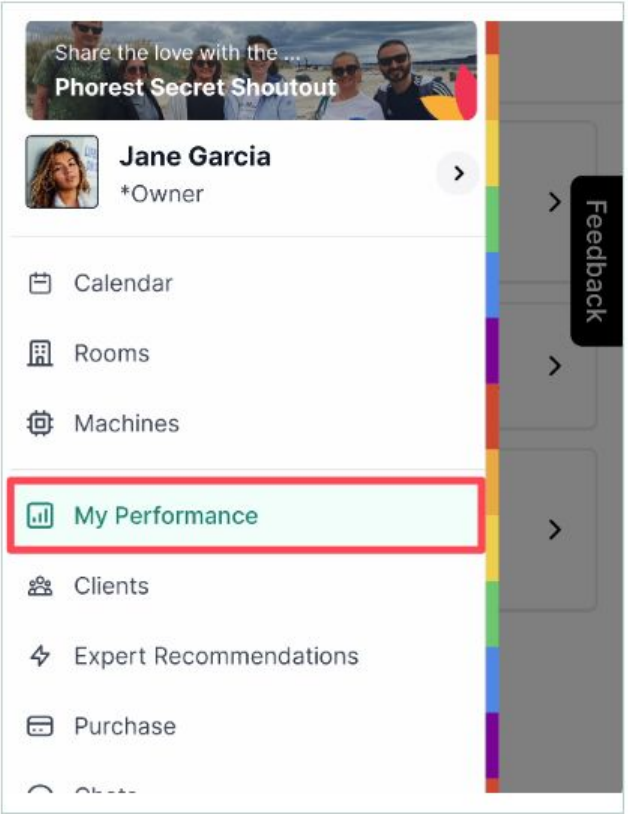


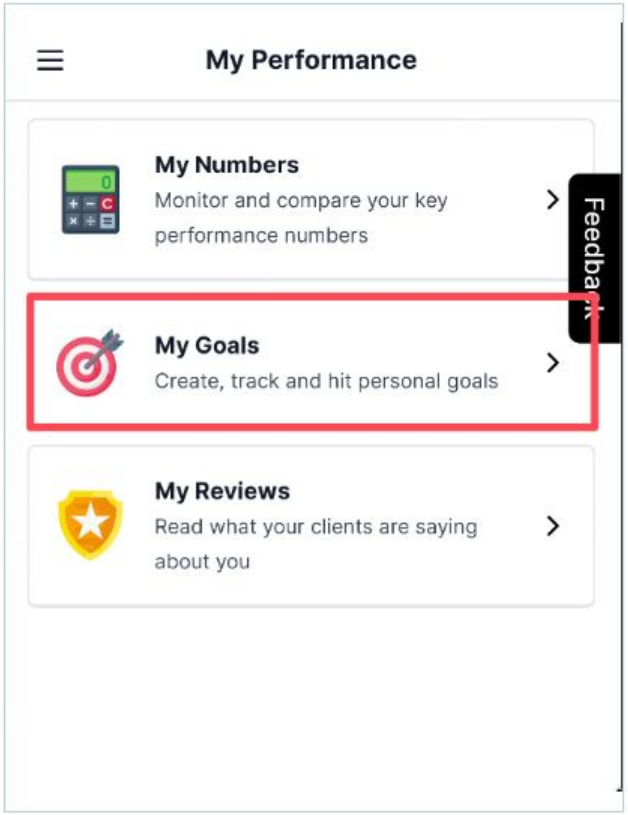
Creating a Goal:

Step 1: Choose whether this will be for one or multiple staff members
Step 2: Choose the metric you would like to track
Step 3: Select if you would like the goal to repeat
Step 4: Give the goal a name



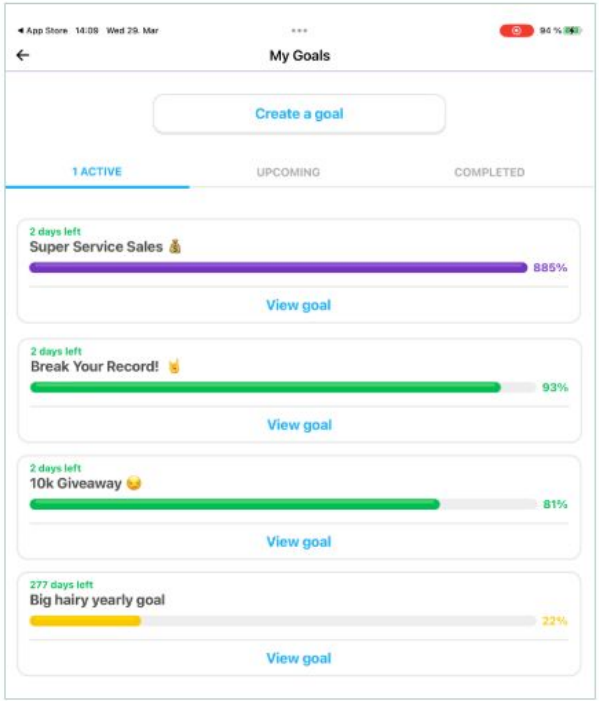
Each staff member will receive a notification on PhorestGo on the starting day of the goal to let them know that their goal has started.



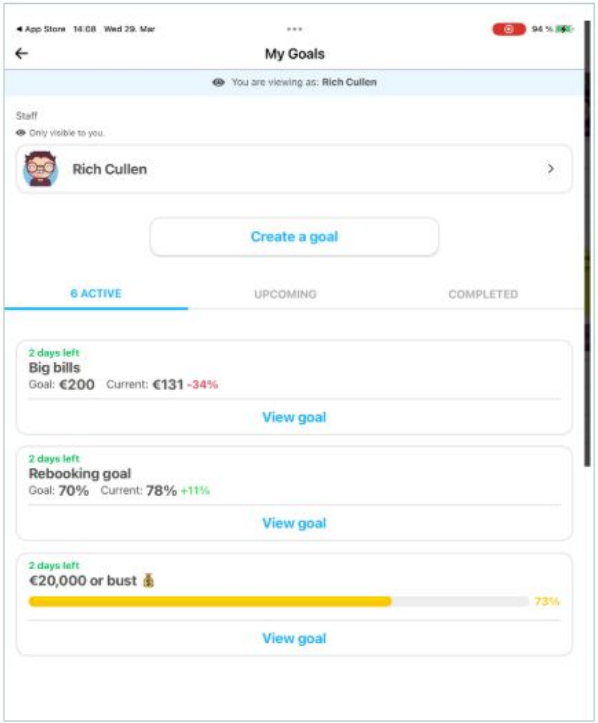


Viewing the progress of the goal

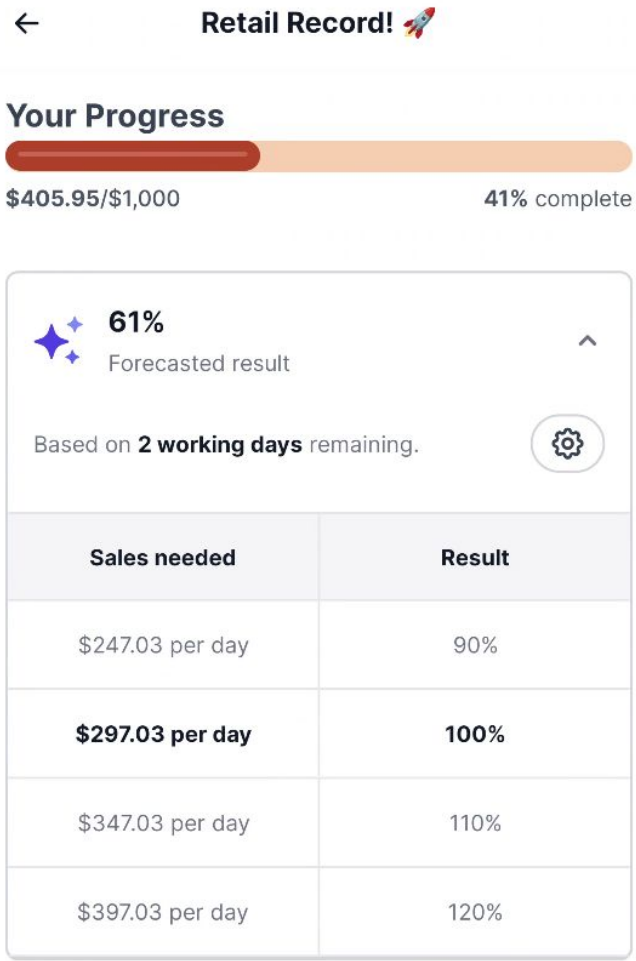
Staff View



Manager View



Staff view and Manager view



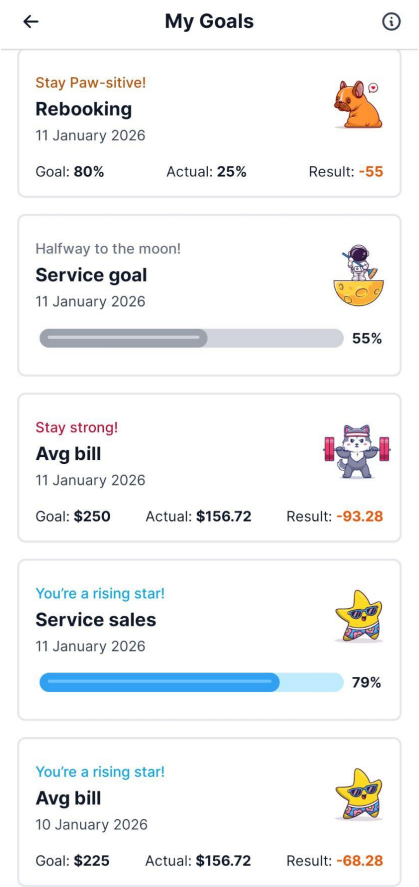
Goal Forecasting:

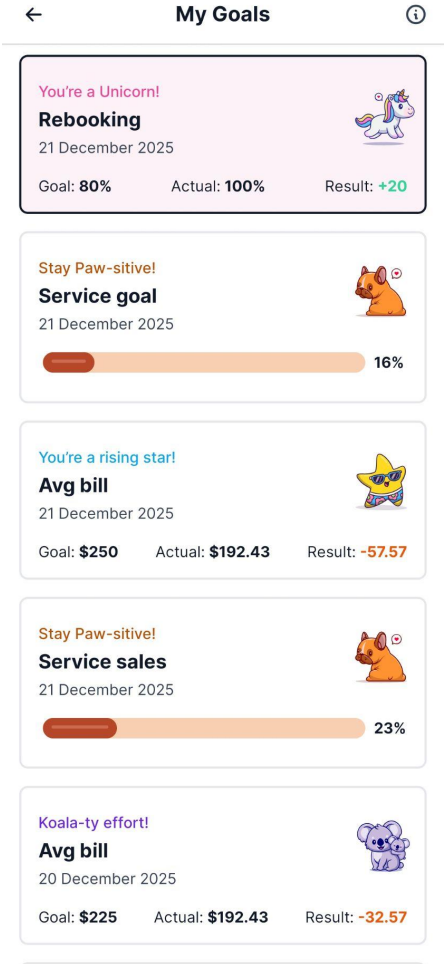
The forecasted result helps staff see what they need to achieve each day or hour to reach their goal, based on their remaining rostered hours.

It breaks big goals into smaller, manageable targets and updates in real time as progress is made.

Forecasting is available for active goals that are six days or longer and will appear after two full days of data have been collected.

It works for Service Sales, Retail Sales, and Client Visits, and gives staff a clear view of what's needed to hit 90%, 100%, 110%, or 120% of their goal.





Goal Icons

Here are some examples of the new goal icons

Expert Recommendations

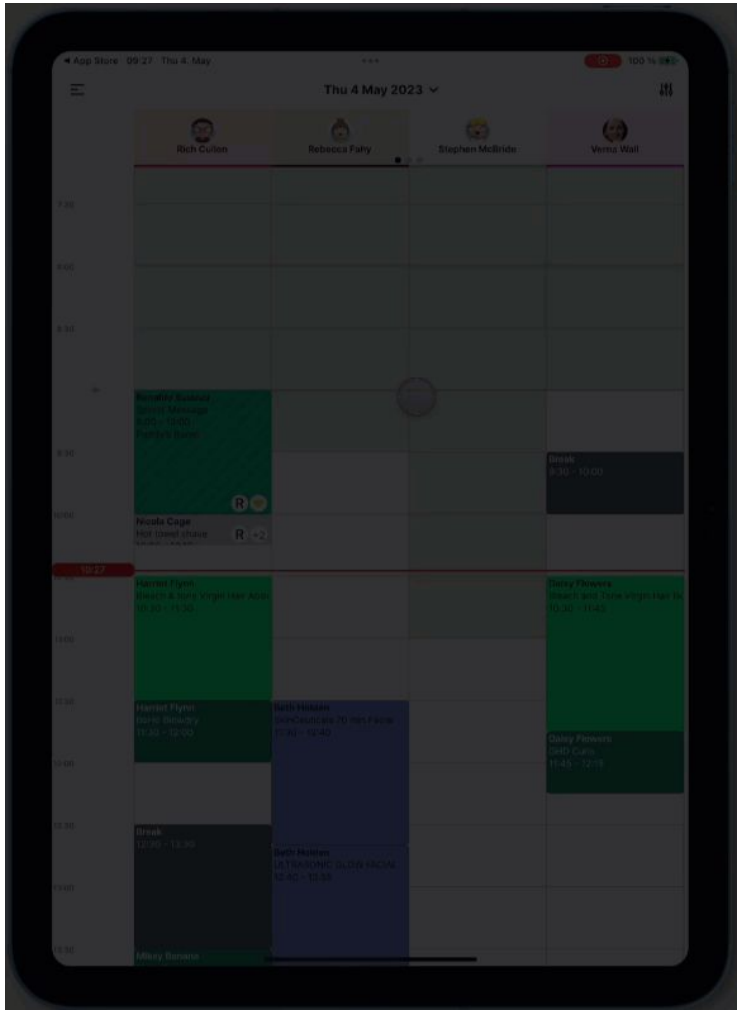
Sometimes, clients may not be ready to purchase a recommended product during their appointment.

Expert Recommendations enables staff members to send personalized retail product recommendations to clients via SMS, allowing clients to purchase the product(s) later in your Online Store.

Tip: ensure your stock and online store is up to date

Help Sheet:
What is Expert Recommendations and how do I use it? – Phorest

What is the Online Store and how do I set it up?


App Store 09:27 Thu 4 May
100 %
Thu 4 May 2023
Rich Cullen
Rebecca Fahy
Stephen McBride
Verna Wall
7:30
8:00
8:30
Natalie Eastwood
Sport Massage
08:30 - 10:00
Fadyn's Book
R
Break
8:30 - 10:00
9:00
Nicole Cage
Hot towel shave
R +2
10:27
10:30
Harriet Flynn
Beach & Tone Virgin Hair Addi
10:30 - 11:30
Daisy Flowers
Beach and Tone Virgin Hair Ba
10:30 - 11:45
11:00
12:00
Harriet Flynn
Hand Beautiy
11:30 - 12:00
Beth Holden
Dermaplaning 20 min Facial
11:40 - 12:40
Daisy Flowers
Gel Cuts
11:45 - 12:15
12:30
Break
12:30 - 13:30
Beth Holden
ULTRASONIC SLOW FACIAL
12:40 - 13:55
13:00
13:30
Mikey Banana

Sending a product recommendation

Recommended products

Dynamic Skin recovery Spf 50

Dried Lavender & Oak Candle

Add another product

Message

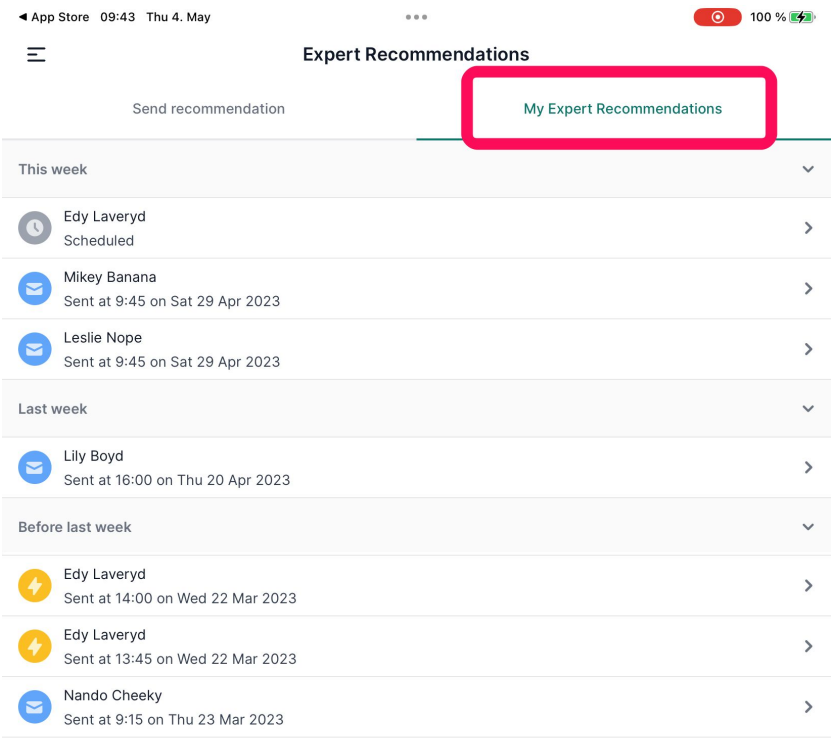
Hi Alex, here's a link for the product(s) I'd like to recommend based on your recent visit to Rich Cullen Demo: [link], Thanks, Jane

This message cannot be edited

- [x] I have asked this client for permission to send this message.

Send recommendation

SMS charged at usual rate



View your recommendations in PhorestGo

Statuses:

means the message is **scheduled** to be sent within the next 24 hours.

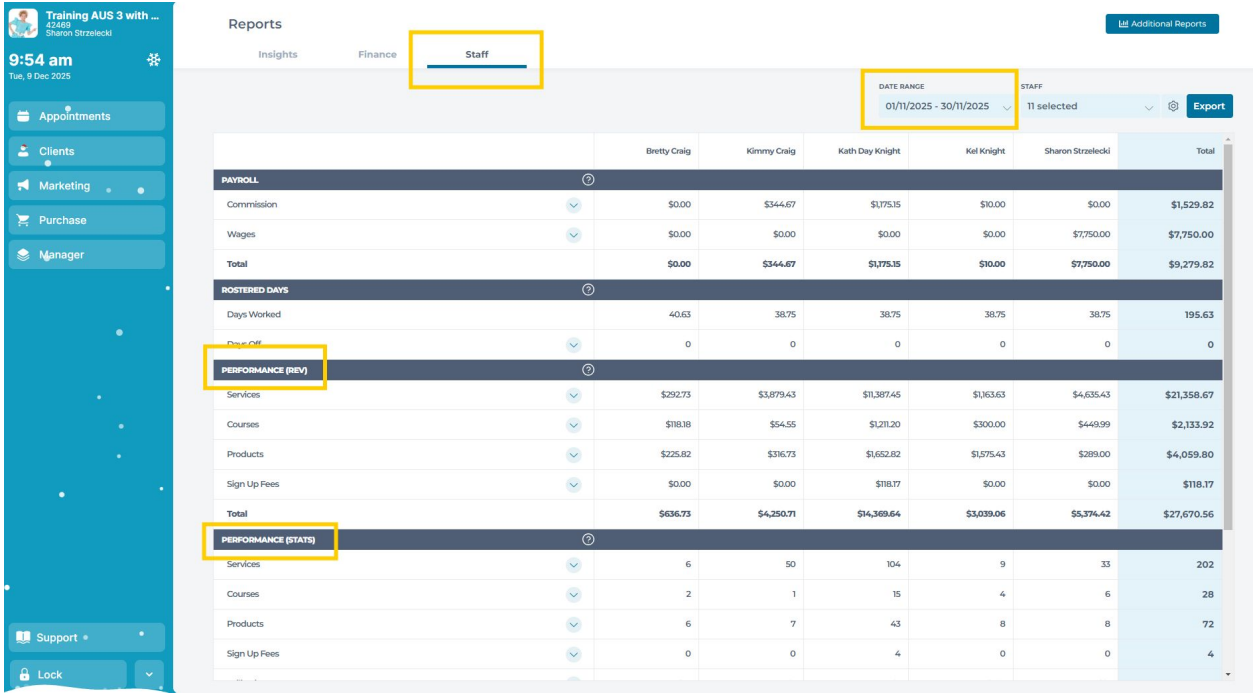
means the message has been sent to the client, but they **haven't made a purchase** using the Expert Recommendation link yet.

means the client **made a purchase** using the Expert Recommendation link.

Phorest

• Reporting

Help Sheet:
How do I view my team's performance with Expert Recommendations?



	Bretty Craig	Kimmy Craig	Kath Day Knight	Kel Knight	Sharon Strzelecki	Total
PAYROLL						
Commission	$0.00	$344.67	$1,175.15	$10.00	$0.00	$1,529.82
Wages	$0.00	$0.00	$0.00	$0.00	$7,750.00	$7,750.00
Total	**$0.00**	**$344.67**	**$1,175.15**	**$10.00**	**$7,750.00**	$9,279.82
ROSTERED DAYS						
Days Worked	40.63	38.75	38.75	38.75	38.75	195.63
Days Off	0	0	0	0	0	0
PERFORMANCE (REV)						
Services	$292.73	$3,879.43	$11,387.45	$1,163.63	$4,635.43	$21,358.67
Courses	$118.18	$54.55	$1,211.20	$300.00	$449.99	$2,133.92
Products	$225.82	$316.73	$1,652.82	$1,575.43	$289.00	$4,059.80
Sign Up Fees	$0.00	$0.00	$118.17	$0.00	$0.00	$118.17
Total	**$636.73**	**$4,250.71**	**$14,369.64**	**$3,039.06**	**$5,374.42**	$27,670.56
PERFORMANCE (STATS)						
Services	6	50	104	9	33	202
Courses	2	1	15	4	6	28
Products	6	7	43	8	8	72
Sign Up Fees	0	0	4	0	0	4

View the Staff tab from the Reports Dashboard

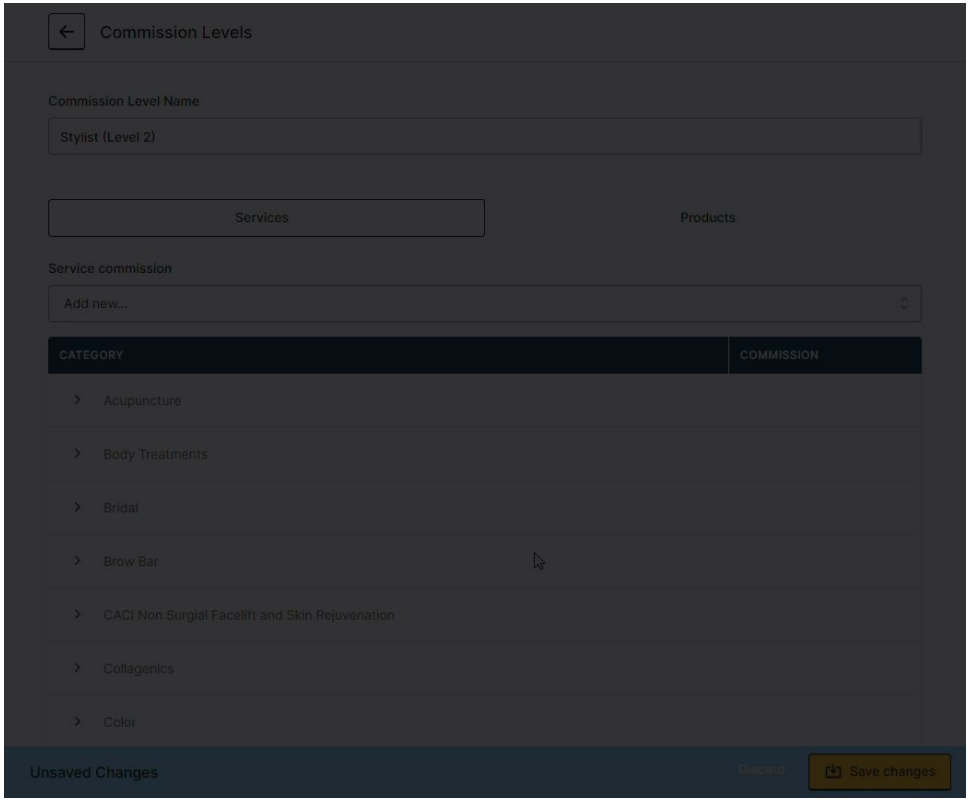
Commission structures

Reward your staff performance with Commissions

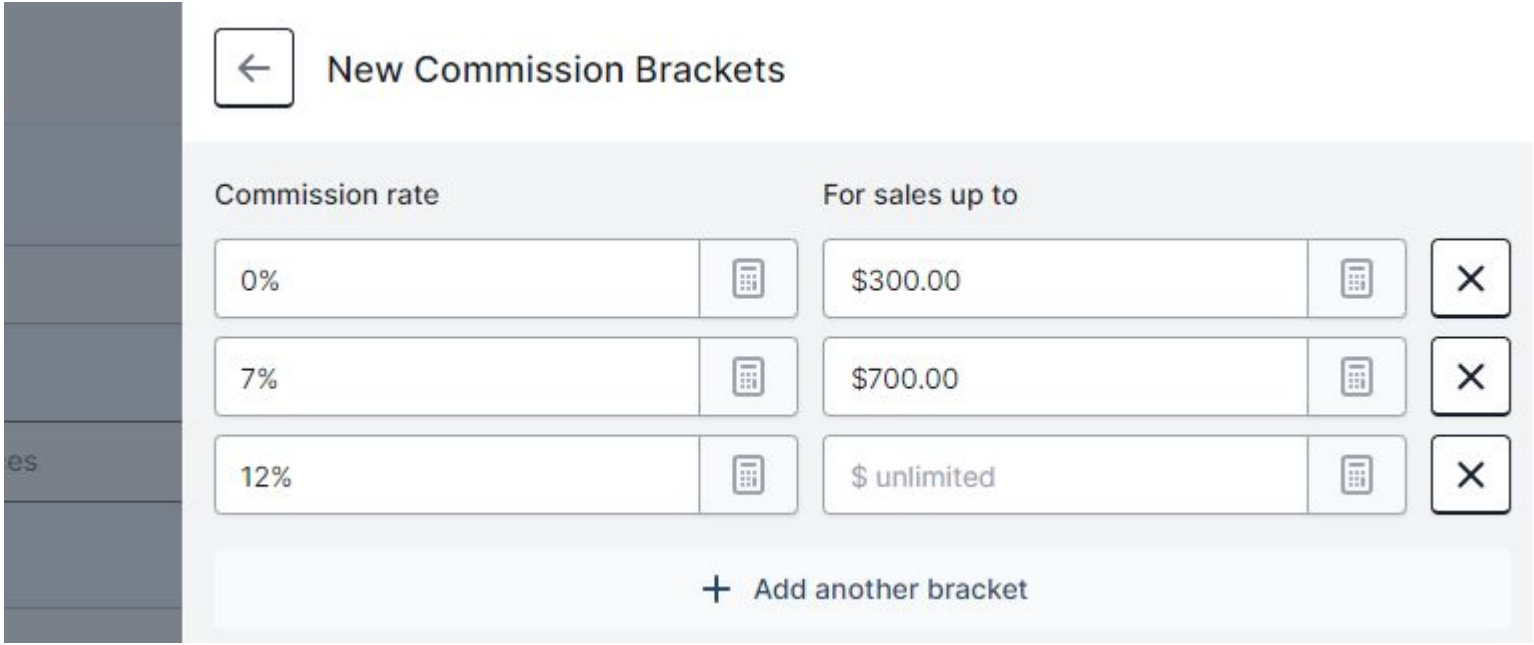
Step 1: decide on the date range in which you will pay your staff their commission

Help Sheet:
How do I set up staff commission?

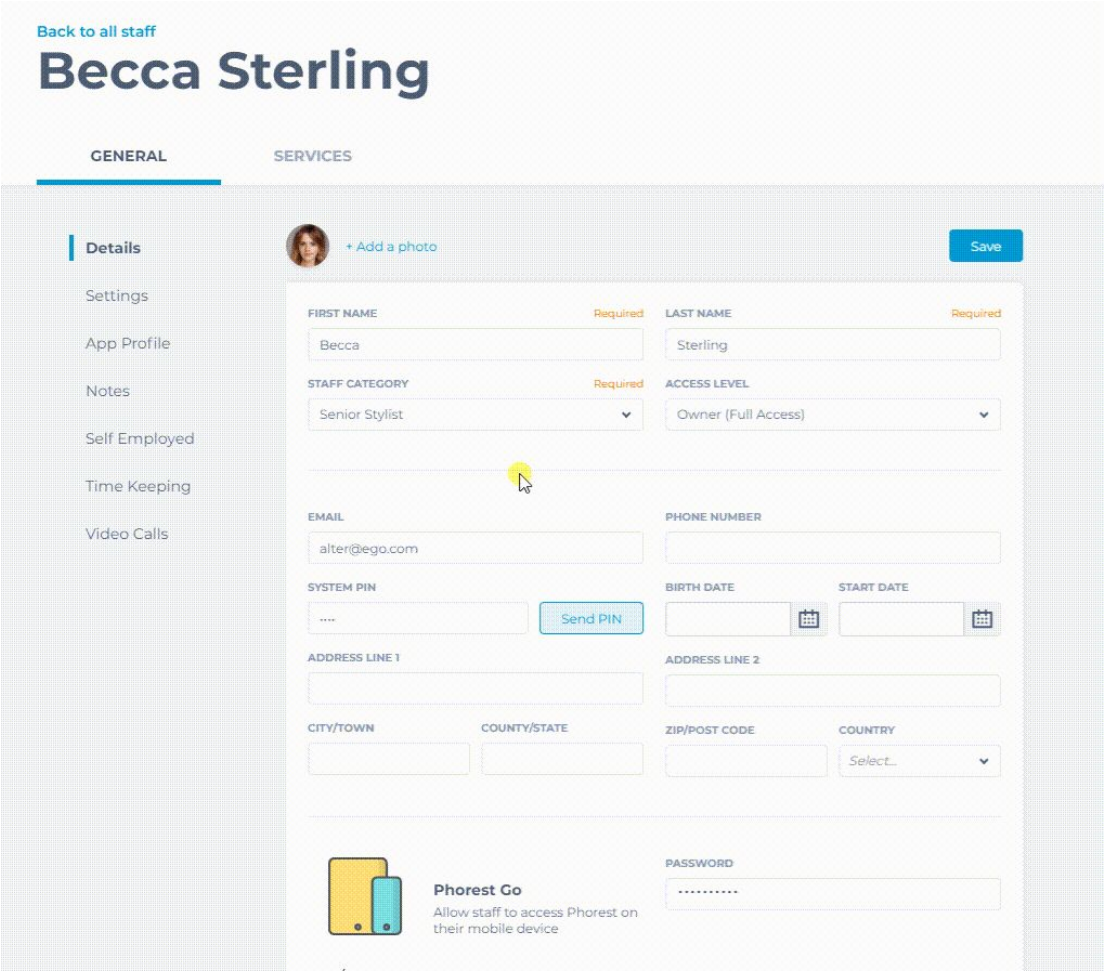
All Commissions Help Sheets



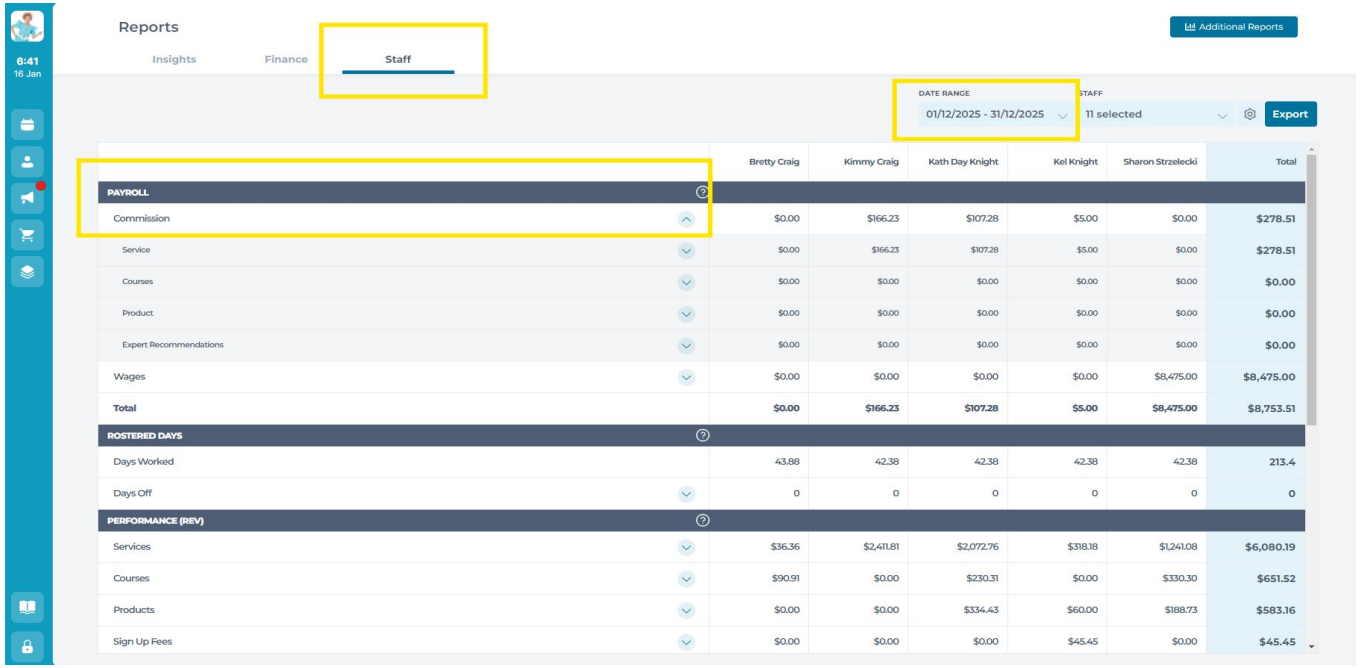
Create the commission structure around the period that the staff are paid. Eg Fortnightly pay - create the commission values for that fortnight and then run the report for a two week period.



For Tiered Commission structures, just add another bracket to add the next level.



Assign the commission structure to your staff member



	Bretty Craig	Kimmy Craig	Kath Day Knight	Kel Knight	Sharon Strzelecki	Total
PAYROLL						
Commission	$0.00	$166.23	$107.28	$5.00	$0.00	$278.51
Service	$0.00	$166.23	$107.28	$5.00	$0.00	$278.51
Courses	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Product	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Expert Recommendations	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Wages	$0.00	$0.00	$0.00	$0.00	$8,475.00	$8,475.00
Total	**$0.00**	**$166.23**	**$107.28**	**$5.00**	**$8,475.00**	$8,753.51
ROSTERED DAYS						
Days Worked	43.88	42.38	42.38	42.38	42.38	213.4
Days Off	0	0	0	0	0	0
PERFORMANCE (REV)						
Services	$36.36	$2,411.81	$2,072.76	$318.18	$1,241.08	$6,080.19
Courses	$90.91	$0.00	$230.31	$0.00	$330.30	$651.52
Products	$0.00	$0.00	$334.43	$60.00	$188.73	$583.16
Sign Up Fees	$0.00	$0.00	$0.00	$45.45	$0.00	$45.45

Reporting: Dashboard > Staff > Commissions or

Additional Reports > Staff

- Staff Commission Detail report
- Staff Commission Overview

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Summary

Please refer back to the **Phorest GYM** landing page for some the topic references, guides, blog post and links to our book sessions with one of our lovely Success Management team members: https://www.phorest.com/au/grow/