

mindbody

TEMPLATE

A Ready-to-Use Reporting Template for Fitness and Wellness Businesses



You're not alone if you use spreadsheets to manually track how your business is performing. It's a practical, accessible way to monitor essential metrics like sales, memberships, payments, client visits, and revenue, especially in the early stages. Tracking performance data gives you the insights to make informed decisions, spot growth opportunities, and address challenges before they become problems.

The limits of manual reporting

Spreadsheets may work when your business is small, but as operations become more complex, manual reporting begins to hold you back. As your business evolves, manual reporting:

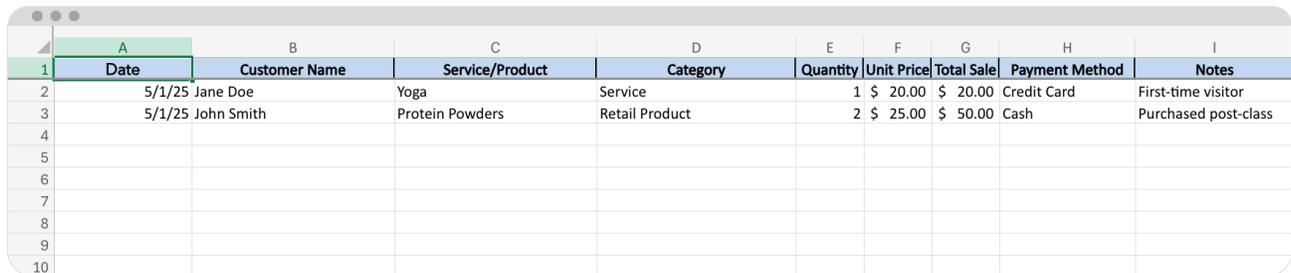
- Becomes harder to manage and takes time away from client-focused work
- Increases the risk of errors that can lead to inaccurate reporting
- Offers limited insight into the reasons behind performance trends and patterns
- Lacks real-time data, delaying timely decisions
- Creates collaboration issues with inconsistent and duplicative updates



Not ready for a reporting platform? Start here

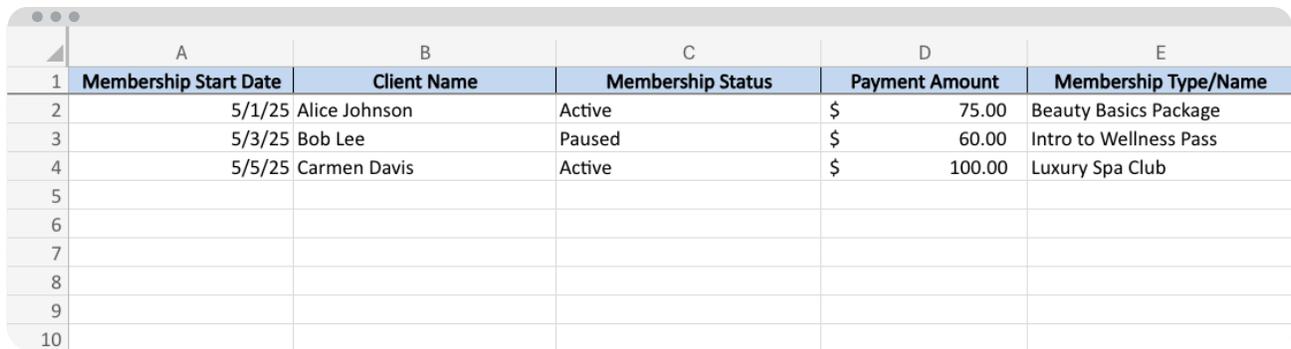
If you're not ready to integrate reporting tools into your operations, we've developed a reporting template to help you monitor your metrics. Use it to track sales, memberships, client visits, payments, and revenue.

Fitness Reporting Template



| | A | B | C | D | E | F | G | H | I |
|----|--------|---------------|-----------------|----------------|----------|------------|------------|----------------|----------------------|
| 1 | Date | Customer Name | Service/Product | Category | Quantity | Unit Price | Total Sale | Payment Method | Notes |
| 2 | 5/1/25 | Jane Doe | Yoga | Service | 1 | \$ 20.00 | \$ 20.00 | Credit Card | First-time visitor |
| 3 | 5/1/25 | John Smith | Protein Powders | Retail Product | 2 | \$ 25.00 | \$ 50.00 | Cash | Purchased post-class |
| 4 | | | | | | | | | |
| 5 | | | | | | | | | |
| 6 | | | | | | | | | |
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Wellness Reporting Template

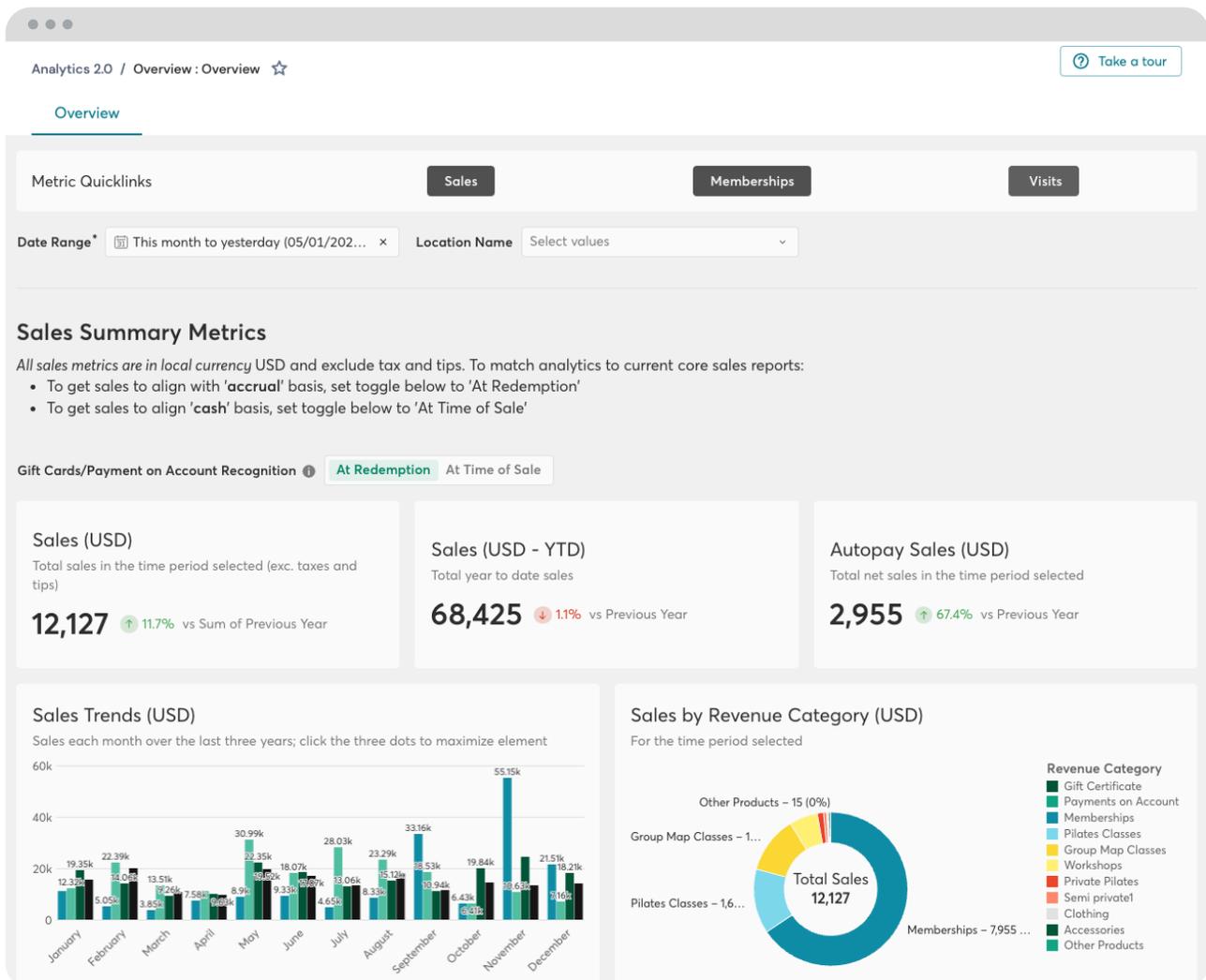


| | A | B | C | D | E |
|----|-----------------------|---------------|-------------------|----------------|------------------------|
| 1 | Membership Start Date | Client Name | Membership Status | Payment Amount | Membership Type/Name |
| 2 | 5/1/25 | Alice Johnson | Active | \$ 75.00 | Beauty Basics Package |
| 3 | 5/3/25 | Bob Lee | Paused | \$ 60.00 | Intro to Wellness Pass |
| 4 | 5/5/25 | Carmen Davis | Active | \$ 100.00 | Luxury Spa Club |
| 5 | | | | | |
| 6 | | | | | |
| 7 | | | | | |
| 8 | | | | | |
| 9 | | | | | |
| 10 | | | | | |

When you've outgrown the spreadsheets, embrace scalable reporting

Manual reporting gives you a basic understanding of your business performance and keeps things organized, but it's not designed to sustain your business in the long run. Over time, tracking and managing these metrics in a spreadsheet becomes limiting. That's when you need a reporting platform that does the heavy lifting for you.

Mindbody takes the guesswork out of tracking by automatically capturing, organizing, and presenting your key metrics in real time—so you always have accurate, up-to-date insights to guide your next move.



Analytics offers a comprehensive view of your performance metrics, allowing you to identify sales trends.

Here are a few ways Mindbody software can make a difference:

Save time with automated reporting.

Eliminate manual data entry and let the system run the reports you need, when you need them.

Access real-time, accurate metrics.

Automatic updates ensure you always have current data on hand and don't have to second-guess outdated spreadsheets.

Get a complete view of your business performance.

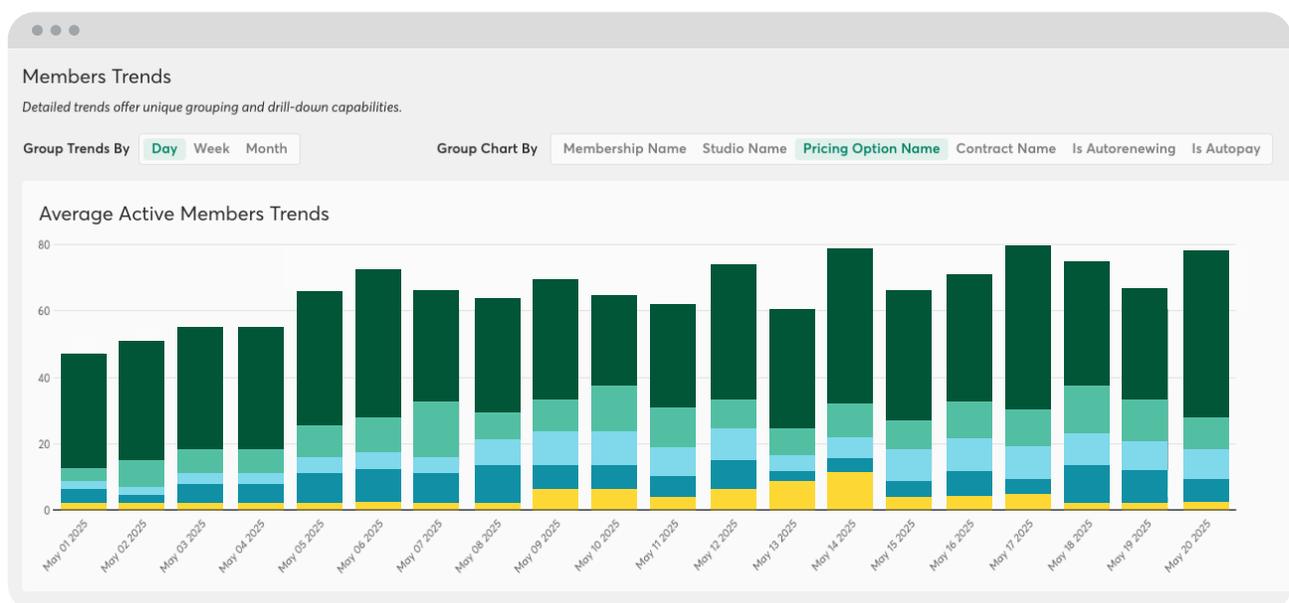
Track everything from top-performing staff and services to revenue by location, class type, or time period. Customizable dashboards let you view overall performance or focus on specific business areas.

Make smarter, data-driven decisions.

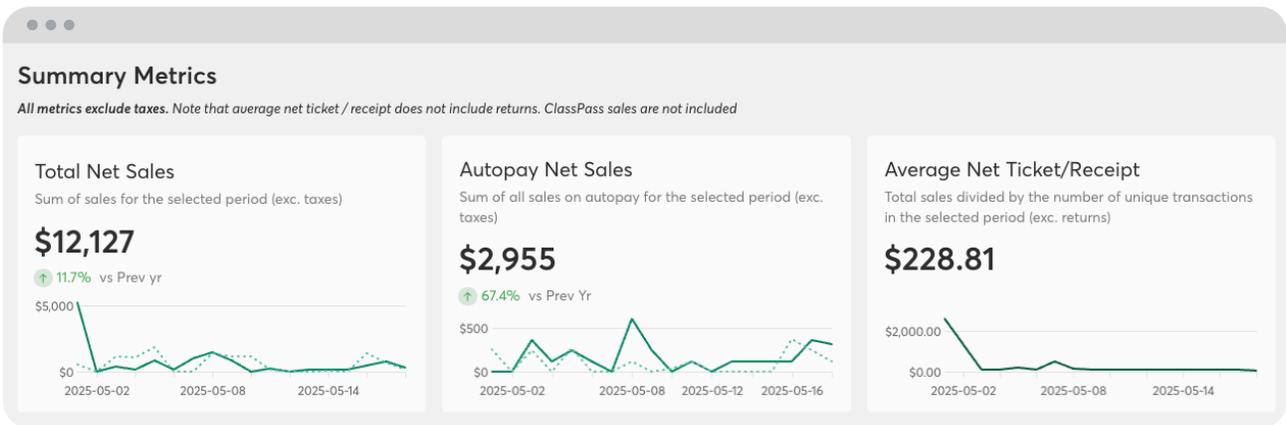
Use filters and visualizations to identify trends, pinpoint areas for growth, and make confident decisions about your business.

Understand client behavior and retention.

Easily analyze the frequency of client visits, track retention rates, and measure client lifetime value.



The Membership Trends tab provides detailed insights into membership types across multiple locations.



The Summary Metrics tab displays a breakdown of Total Net Sales, Total Tickets/Receipts, and Average Net Ticket/Receipt Value.

Our spreadsheet template is a great starting point, but as your business grows, a reporting platform offers a more efficient, hands-off solution. It delivers accurate, real-time data and deeper visibility into your performance—so you can make smart decisions with less manual work.



**Your business is growing—make
sure your reporting can keep up**

mindbodyonline.com/business/reporting

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