

# EAST JACKRABBIT USER CONFERENCE

## Huntersville, NC

### March 14, 15, 16, 2012



## WHO SHOULD ATTEND!

The Jackrabbit East Conference is designed for Users who are set up in Jackrabbit Systems as:

- New Users who are set up in the system and have explored the Getting Started Guide and Video
- Veteran Users who wish to learn more comprehensive details about Jackrabbit systems.
- Businesses not yet Jackrabbit clients that are interested in seeing the Jackrabbit Systems in action.
- All Users looking for expert training, excellent refreshments and meals, loads of learning and Fun!
- **Advisory Alert!** Brand New Users who are NOT YET SET UP may wish to come to the conference with the understanding that NO TOPICS will be presented for "GETTING STARTED" Users. Auditing topics may give you a proactive opportunity to see the systems through the eyes of Jackrabbit Users.

## Conference Overview!

**East Coast User Conference Fee:** \$95 per person: Includes everything on the following pages.

**Conference Day 1: Small Group Consultation:** (Wed Mar 14 - By appointment only – limited space - first reservation basis)  
Small Group Consultations put you face to face with a Jackrabbit Expert. You direct the consultation through topics and questions submitted prior to your consultation time.

**Conference Days 2-3: Devoted to Group and Breakout Topics:** East User Conference days two and three will be packed with the latest training on Jackrabbit basics and enhancements, through brand new sessions on convenient Jackrabbit features. Jackrabbit plans each session toward helping you make the most out of your business Jackrabbit Software. Group Topics challenge both Veteran Users and those who are just getting started. During **Breakouts** Users can mix and match the topics to attend. In **Breakouts**, are you a Veteran User in some Jackrabbit features who might like more basic information on our newer features or are you a New User ? Seek out expert advice from the fabulous Jackrabbit Team!

**By popular demand:** Small Group Consultations (by appointment), featured speakers, Jackrabbit User Stories, catered breaks and lunches along with loads of fun and relaxation during our Thursday Evening Southern Style Barbeque as we cruise the Lake. Please read the session descriptions to help you decide the best level to fit your needs. \* Free shuttle service will be provided for hotel guests to and from the host hotel to the conference venue.

**For best prices on travel and hotel, and to guarantee your space in the conference,** we recommend that you book your travel and hotel reservations as soon as you receive a Jackrabbit Conference Confirmation Email. Confirmation will be sent to the lead contact email on your Jackrabbit Conference Registration Form within 48 hours of receipt of your registration. Please direct all registration questions to [nancy.juc@gmail.com](mailto:nancy.juc@gmail.com)!

**East Coast User Conference Cancellation/Refund:** The last date to cancel and receive a refund is March 1, 2012

# EAST USER CONFERENCE SATELLITE MAP LINK

## Jackrabbit Headquarters and Zippy's house!

9280 Northcross Center Ct. Huntersville, N.C. 28078

Inside the North Cross Corporate Center

- Cut and paste link below into your web browser for a satellite image of the Jackrabbit Conference Venue and Recommended Lodging. Please make your own reservations at one of the recommended hotels. Jackrabbit does not carry room blocks at any hotels. Please go online to view best available rates
- **GREEN ARROW = Jackrabbit Venue gives you an aerial view of Jackrabbit Headquarters.**  
**RED BALLOON " C " shows hotel location and link to hotel property, descriptions & amenities.**
- The NorthCross Shopping Center sits between the hotels and the Jackrabbit Venue. Browse the NorthCross Merchant List at: <http://www.shopnorthcross.com/>
- **Click on this aerial view for Venue Orientation, Directions, and hotel location!**  
[http://maps.google.com/maps?near=9820+Northcross+Center+Ct,+Huntersville,+NC+28078&geocode=CY9EJL0g\\_JdFFQPiHAldiiUu-ylhesKVBalWiDGdQQbB3gAOJg&q=lodging&vps=1&f=li&gl=us&hl=en&jsv=388c&sll=35.447106,-80.86916&sspn=0.034961,0.058365&vpsrc=6&ei=s7IQT6CSFZT8iQLho5WRCw](http://maps.google.com/maps?near=9820+Northcross+Center+Ct,+Huntersville,+NC+28078&geocode=CY9EJL0g_JdFFQPiHAldiiUu-ylhesKVBalWiDGdQQbB3gAOJg&q=lodging&vps=1&f=li&gl=us&hl=en&jsv=388c&sll=35.447106,-80.86916&sspn=0.034961,0.058365&vpsrc=6&ei=s7IQT6CSFZT8iQLho5WRCw)

**TRAVEL:** Airport->Venue 23 miles

### **BY AIR**

To (CLT)

Charlotte/Douglas International Airport.

Browse online for a variety of online transport services from the airport to your hotel or the Jackrabbit venue.

### **WEATHER**

March averages:

Day Time high: 62degrees

Night Time Low: 39 degrees

Chance of Rain: 47%

**UMBRELLA RECOMMENDED**

### **VENUE ADDRESS**

9280 Northcross Center Ct.

Huntersville, N.C. 28078

Inside the North Cross Corporate Center

## Jackrabbit User Conference Lodging

Please note: Jackrabbit holds a hotel block under " Jackrabbit User"

### **HOTEL**

Country Suites By Carlson - Lake Norman

**Ask for Jackrabbit User Rate: \$89**

16617 Statesville Rd, Huntersville, N.C. 2807 Reservations: Toll Free 800.830.5222

Direct line: 704.895.6565

<http://www.countryinns.com/huntersville-hotel-nc-28078/nclake>

### **FREE SHUTTLE BETWEEN HOTEL & VENUE**

The Country Inn and Suites provides a free shuttle service for Country Suites guests on Wed March 14 for Small Group Consultations, Thurs March 15, pre and post conference, and Friday March 16<sup>th</sup> pre and post conference.

Shuttle schedule to be coordinated by Jackrabbit East Conference Liaison Janet Bartlett.

# East User Conference Information

## ONSITE ATTENDEE CHECK-IN: Registration Packet Pick-up in the Venue Lobby

~ Day 1: Check-in will be held on Wednesday during Small Group Topics starting at 12:30pm

~ Day 2: Check-In prior to Conference Opening Remarks right outside the Group Session Room starting at 7:30am.

- **ATTENDEE PACKET:** Each attendee will receive a packet which includes your nametag, feedback form, roster of conference attendee businesses, and a tabletop name placard to place on the table in front of you. Also included is a Jackrabbit Booklet. Subject to change, this Booklet follows the conference sessions as they are scheduled over Days 2 & 3. You'll find plenty of space for notes on the pages of your booklet.

## CONFERENCE ATTIRE, PERSONAL COMPUTERS, INTERNET, BREAKOUT SESSIONS, POTENTIAL DISTRACTIONS

- **CONFERENCE ATTIRE:** We encourage you to dress in layered comfortable clothing. Wear your best thinking clothes!
- **INTERNET:** Wireless internet connection in the conference meeting rooms is included in your registration fee.
- **PERSONAL COMPUTERS AND TABLETS:** Please bring your pad and/or personal computer for use during the conference.
- **POWER OUTLETS:** Outlets will be placed under your tables to enable you to plug in. For security, please keep your computer with you at all times.
- **BREAKOUT SESSIONS – TIP TO DETERMINE YOUR USER LEVEL:** As you know Jackrabbit has included numerous offerings and enhancements in the Software. To help you determine which level of user you are, please read the BREAKOUT TOPIC descriptions below. These descriptions may help you decide which level of BREAKOUT to attend. If you have trouble deciding, we suggest that you make two columns on a sheet of paper. List sub-categories, by topic, where you feel comfortable, in one column. List sub-categories where you have less experience, and/or feel uncomfortable, in the other column. Also consider listing sub-categories featuring new enhancements interested in trying. Feel free to move between rooms if you realize you may learn more effectively at a different level.
- **POTENTIAL DISTRACTIONS:** Your User Conference is an intense learning environment. As a courtesy to all attendees please keep your cell phone on vibrate and step out of the meeting rooms and move to a quiet location to make or take important phone calls. We request that you keep individual conversations to a minimum as these tend to interfere with the overall conference learning environment. To avoid interruptions in classmate concentration, take private conversation outside the meeting room, move away from the doorways, and keep your vocal levels moderate. **Many thanks for your understanding!**

## BREAKS, REFRESHMENTS, AND THURSDAY NIGHT JACKRABBIT SOUTHERN STYLE BARBEQUE CRUISE

- **BREAKS:** Jackrabbit Conference attendees will enjoy two refreshing beverages and light snacks break on Thurs & Fri
- **LUNCH:** Lunchtime: Leisurely 75 minute lunch gives attendees time to enjoy a mid-day meal and regroup.
- **JACKRABBIT BARBEQUE ON THE LAKE:** Luxury Coach Transportation provided to/ from the Yacht Club
- **THURSDAY, MARCH 15: 6:00pm – 9:30pm** at the Peninsula Yacht Club, 18501 Harbor Light Blvd, Cornelius
  - **Attire:** Layered Casual for Warmth and Comfort. Please bring your umbrella just in case
  - **6:00pm:** Meet at announced Rendezvous Point (TBA) to board the Luxury Jackrabbit Motor Coach
  - **6:30pm:** Jackrabbit Luxury Motor Coach departs for Peninsula Yacht Club
  - **7:00pm- 9:00pm:** Attendees & the Jackrabbit Team will enjoy a hearty NC Style catered barbeque, cash bar, lively music and friendly conversation as we cruise the lake. You'll have plenty of time to relax & have fun!
  - **9:00pm:** Board the Jackrabbit Luxury Motor Coach and return.



# 2012 JACKRABBIT East User Conference SCHEDULE

## Topics are Presented Through

### **Small Group Consultations:** (Wed Mar 14 - By appointment only – limited space - first reservation basis)

Small Group Consultations put you face to face with a Jackrabbit Expert. You direct the consultation through topics and questions submitted prior to your consultation time. Register for a Small Group Consultation by checking “yes” to Question 6 and completing Question 7 of the Online Registration Form. Be sure to list topics you would like to cover during your Consultation. You will receive an email confirming your request for small groups within 48 hours of registration.

**Please note:** You will receive your Small Group Consultation appointment time, via email **no earlier than Wed March 7<sup>th</sup>**.

### **Group Topics:**

Group topics are held in the Jackrabbit general meeting room. They feature a mixture of quick review followed by discussion of new material. During Group Topics, Veteran and New Users combine as topics are presented. Jackrabbit embraces the concepts that Users learn at their own pace while diverse levels of brainpower yield higher overall levels of learning. Skilled Users may be called upon to describe their learning curves, Software experiences, unique ways they have put their Software to use, and their overall results.

### **Breakout Topics:**

Breakout Topic Sessions are unique in challenging your individual User level, by topic. The style and pace of presentations are dependent upon the room you choose. As a “Skilled User” or “New User” your experience with Jackrabbit features may vary, please feel free to consider yourself as a “Skilled User” in some topics and a “New User” in others. During Breakout Topics you will cover important Jackrabbit features designed to help increase and sustain the health of your business. Each Breakout Topic will be led by selected Jackrabbit Team Experts. Please consider your level of mastery in the Breakout Topics shown below. Topics run Parallel. Feel free to move between rooms to adjust to your needs.

# DAY 1: Wednesday (Optional)

## SMALL GROUP CONSULTATIONS - 1:00pm-5:00pm

### Day 1 features Extremely Popular 45 minute Small Group Consultations! Custom Consultations start on the hour between 1:00pm and 5:00pm

Here's your opportunity to have a Jackrabbit team member focus on your pre-requested topic and respond in-depth to your particular questions and challenges. These popular sessions are made by reservation only assigned on a first come basis, and adhere to a tight schedule. You will be notified of your Small Group Consultation appointment, via email, by midnight on Wed March 7<sup>th</sup>. To gain maximum benefit from your small group reservation, plan to arrive at least 15 minutes prior to your assigned time, check in at the registration desk and pick up your business packet. Please bring your computer, something to write with, and note paper.

In the event that you cannot attend your assigned Small Group timeslot, please cancel at least 24 hours prior to your appointment time by contacting Nancy at [nancy.juc@gmail.com](mailto:nancy.juc@gmail.com). This will act as courtesy to attendees who are wait-listed for Small Group Reservations and to the Jackrabbit Team Leader assigned to your group.

# DAY 2: Thursday 8:00am – 5:00pm

followed by: Jackrabbit Southern Style Barbeque Cruise on the Lake

08:00am – 08:15am

**GOOD MORNING! WELCOME! Meet the Jackrabbit Team!**

Grab a cup of morning Starbucks coffee or tea from the coffee buffet; and settle in.

Twice annually, on the East and West Coasts, Jackrabbit Users and Team Jackrabbit will enjoy the opportunity to greet each other in person!

## Your Jackrabbit team is growing!

How many bunnies do you see up at the front of the room grinning at you?

08:15am – 08:45am GT-2

### Group Topic 1: SECURITIES AND PERMISSIONS

Information security is paramount. Learn how to assign permissions to each user in your company allowing them to view only information that applies to them.

Jackrabbit has over 100 which dictate what a user can and cannot do. This topic will help you decide which ones should or shouldn't be selected for different types of users.

Learn and understand “Best Practices” to make your Jackrabbit database secure and protected from unauthorized use.

08:50am – 09:30am GT-2

### Group Topic 2: CLASS MANAGEMENT

This topic covers a range of operational information and helps your office to stay on top of vital information:

- Daily Class Schedules
- Instructor Schedules, Availability and Access
- Enrollment Snapshots
- Private Lessons
- Archiving Classes
- Class Rolls
- Sign In and Sign Out Sheets



## SKILLED USER BREAKOUTS 1-5

10:00am – 10:45am SKBT-1

### Breakout Topic 1: TRANSACTIONS & CATEGORIES

Covers the transactions types for fees and payments, for example:

- Tuition
- Merchandise
- Registration
- Searching
- Expanded Sub-Types

## NEW USER BREAKOUTS 1-5

10:00am – 10:45am NUBT-1

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Covers the transactions types for fees and payments, for example:

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- Merchandise
- Registration
- Searching
- Expanded Sub-Types

**10:50am – 11:45am SKBT-2**

**Breakout Topic 2: POSTING TUITION/GROUP FEES**

- Study Tuition Fees by Total Hours (Family & Student)
- Posting Late Fees
- Posting Group Fees
- Posting Registration Fees
- Advanced Transaction Searches

**10:50am – 11:45am NUBT-2**

**Breakout Topic 2: POSTING TUITION/GROUP FEES**

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- Posting Late Fees
- Posting Group Fees
- Posting Registration Fees
- Advanced Transaction Searches

**01:00pm – 01:30pm SKBT-3**

**Breakout Topic 3: FINANCIAL REPORTING**

Recognize your top 100 Customers and learn about the Deposit Slip versus Virtual Report Terminal, the Powerful function that enables you to Post Late Fees. Discuss:

- Uncategorized Fees and Un-Applied Payments
- Linking / Unlinking Fees to Payments
- Posting a Fee – Category 1 and Linking
- Transactions and Sub-Type Listing
- Editing Transactions
- Advanced Transaction Search
- QuickBooks Report / Export / Editing
- Revenue Report
- Reconciling Financial Reports
- Aged Fees and Accounts Reports
- Paid Fees Summary
- Tracking Revenue at Department / Program Level
- Refunds and Payments

**01:00pm – 01:30pm NUBT-3**

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- Paid Fees Summary
- Tracking Revenue at Department / Program Level
- Refunds and Payments

**01:35pm – 02:05pm SKBT-4**

**Breakout Topic 4: E-COMMERCE**

Gain understanding of the concepts and options you have through Jackrabbit Software as it passes to Internet Payment Gateways to Credit Card Merchant Accounts.

- Receipts both E-Commerce and Printed
- Search / Process a group of E-Batch Payments

**01:35pm – 02:05pm NUBT-4**

**Breakout Topic 4: E-COMMERCE**

Gain understanding of the concepts and options you have through Jackrabbit Software as it passes to Internet Payment Gateways to Credit Card Merchant Accounts.

- Receipts both E-Commerce and Printed
- Search / Process a group of E-Batch Payments

**02:10pm – 02:40pm SKBT-5**

**Breakout Topic 5: STATEMENTS/ COLLECTIONS**

- Aged Account Reports
- Aged Fees Report
- Search for Unpaid Fees
- Generate HTML-based Email Statements

**02:10pm – 02:40pm NUBT-5**

**Breakout Topic 5: STATEMENTS/ COLLECTIONS**

- Aged Account Reports
- Aged Fees Report
- Search for Unpaid Fees
- Generate HTML-based Email Statements

**2:55pm-3:55pm Getting Others 'To Do What You Want'—Secrets and Subtleties  
Presented by Jeff Metzger**

**Our business is the quintessential 'people business.' The ability to align, influence and inspire employees, parents and kids is without doubt the most important skill an owner, manager or coach can possess. In fact, without this skill, every aspect of your business will be less effective and more stressful. The only way to REALLY supercharge your business is by learning the secrets and subtleties of 'getting people to do what you want.' Please join us.**

Jeff Metzger is the Founding President of Kids First Sports Center. With 108,000 sf housing 18 profit centers including Queen City Gymnastics and the Starfish Indoor Swim School, Kids First is widely recognized as the largest and most successful Multi-Venue Program in the USA. Recent additions include a 2009 22,000sf basketball wing with 3 regulation courts and fitness program and the October 2010 opening of a second location, Kids First Too. Scheduled for opening in September, 2012 is The Campus at Kids First...A Holistic Preschool Education Center. Jeff is also the driving force behind The Small Business BOOT CAMP, a 4-1/2 day, total-immersion leadership, marketing and organizational workshop for the children's sports instructional industry. With well over 1,000 graduates from USA, Australia, Canada, Mexico, Portugal, Singapore, South Africa and Switzerland, BOOT CAMP has changed the lives of countless Owners and Managers, helping them reap the financial and emotional rewards a small business has to offer. Simply put, The Metzger Small Business BOOT CAMP is GUARANTEED to be the best educational investment you will ever make!

NEW in 2011! ILT—Intensive Live-in Training. "Send us a Manager, We Will Return a Leader!" ILTs will be available for all gymnastics disciplines at various times throughout the year. Dates and details soon at [www.metzgerbootcamp.com](http://www.metzgerbootcamp.com). For more info on BOOT CAMP - log-on to [www.metzgerbootcamp.com](http://www.metzgerbootcamp.com) or phone 513.489.7575.

**04:00pm – 05:00pm GT-3**

**GROUP TOPIC 3: ONLINE REGISTRATION**

**During this 60 minute section Jackrabbit founders will cover valuable information on integrating Jackrabbit with your business website. The presenter will take you through:**

- **Online Registration benefits to you and your clients**
- **Customization and flexibility**
- **Accept payments online**
- **Option of "easing" into online registration**
- **Electronic signatures on web form registrations**
- **Discuss what customers see online**
- **Hold priority registration for active students**
- **Obtain an organization ID**
- **Attendees will be asked to share some great examples of how they successfully use Online Registration**



**Jackrabbit Social –Southern Barbeque Style on the Lake!**

**Thursday 6:00pm-9:30pm**

**Zippy and the gang love to party! Join Zippy and Team Jackrabbit as we board a beautiful yacht and cruise on the lake.**

**We'll enjoy tasty barbeque, complimentary non-alcoholic beverages, alcohol cash bar, and a delightful mix of total relaxation guaranteed to float your boat!**

**At 6:00pm you will board a luxury motor coach from the Country Suites, and head to the Peninsula Yacht Club for a fantastic Southern Barbeque! Jackrabbit Motor Coach will return you to the Country Suites at approximately 9:45pm**

# DAY 3 Friday 9:00am – 4:30pm

## Sessions and Closing Remarks

09:00am – 09:40am GT-4

### GROUP TOPIC 4: RECENT AND FUTURE ENHANCEMENTS

The Jackrabbit Team is constantly working on new ideas to assist in the ease of your business operations. Start the morning off right. During this section Zippy the Jackrabbit wants us to show off our newest enhancements and give you a peek into his future bag of tricks.

09:45am – 10:25am GT-5

### GROUP TOPIC 5: APPAREL AND MERCHANDISE

Ordering and Tracking Inventory made easy in this module:

- Create “Sizing Charts” (by Vendor)
- Assign student sizing
- Assign Apparel to Students and Classes
- Add Apparel to above
- Maintain Apparel Order Restrictions (by student/class)
- Create and Print Purchase Orders for Vendors
- Create and Print Apparel Summary Reports
- Post Apparel Deposits and Fees
- Use Module to Order Supplies by Class
- Monitor Apparel, Accessory, and Merchandise Inventory

### SKILLED USER BREAKOUTS 6-7

10:45am – 11:25am SKBT-6

### BREAKOUT TOPIC 6: ENROLLMENT REPORTING

- Enrollment report history
- History of student drops
- Future enrollment feature
- Enrollment from visual schedules
- Reports on wait lists
- Reports on class openings
- Reports on classes menu

### NEW USER BREAKOUT 6-7

10:45am – 11:25am NUBT-6

### BREAKOUT TOPIC 6: ENROLLMENT REPORTING

- Enrollment report history
- History of student drops
- Future enrollment feature
- Enrollment from visual schedules
- Reports on wait lists
- Reports on class openings
- Reports on classes menu

**11:30am – 12:15am SKBT-7**

**BREAKOUT TOPIC 7: LEAD FILE**

- Illustration of a Lead File
- Information tracked per lead
- User Permissions for Lead File
- Search or create a list of leads
- Editing or Adding the Lead File
- Mass Archives
- Email families in Lead File
- Import and Export

**11:30am – 12:15am NUBT-7**

**BREAKOUT TOPIC 7: LEAD FILE**

- Illustration of a Lead File
- Information tracked per lead
- User Permissions for Lead File
- Search or create a list of leads
- Editing or Adding the Lead File
- Mass Archives
- Email families in Lead File
- Import and Export

**01:30pm – 02:10am GT-6**

**GROUP TOPIC 6: MARKETING AND COMMUNICATING**

During this important session, you'll become familiar with

- Source Reports - powerful Selection Criteria
- Jackrabbit generated welcome letters to all new customers
- Storage of Client Family address and contact information
- Mail merge
- Paid fees summaries,
- Breakdown of Revenue generated according to source
- Advanced transaction search
- Powerful marketing through recognition and close contact with your top 100 customers!
- Know when a birthday is coming,
- Update email lists
- Advanced family search feature
- Have access to Email templates
- Cover HTML and Attachments

**02:15pm – 02:45 pm GT-7**

**GROUP TOPIC 7: EVENTS**

Schedule and monitor all types of events such as recitals, competitions, parties, sleepovers and more:

- Adding and Event Type
- Event Type Search
- Event Scheduling
- Client , Staff, Notification Emails
- Agreement Text
- View Enrollment
- Assign Staff
- Track Online Registration
- Multi-Event Reporting (ie: recitals)

# NEW

03:00 pm – 03:30 pm GT-8

## GROUP TOPIC 8: ONLINE REGISTRATION “BEST PRACTICES”

**Online Registration offers a powerful web marketing tool for you and your customers.**

Case studies and illustrations of highly successful Jackrabbit User Businesses. Smooth integration of Jackrabbit into your website promotes the areas your customers value most!

Jackrabbit is designed to complement and feature all areas of your business. Customize your website colors, offerings, promotions, success stories, program features, and more knowing that you have Jackrabbit support behind what your customer sees 24/7.

Merge successful Jackrabbit Systems seamlessly into your existing website for Extreme Marketing Value!

03:35 pm – 04:15pm GT-9

## GROUP TOPIC 9: TOPIC TO BE DETERMINED BY ATTENDEES!

**YOU CALL THE SHOTS!** This “catch all” session always ends with a bang! Led by one or both of the Founding Jackrabbit Partners, Mark Mahoney and Mike Carper, attendees are asked to call out any topics covered over the past two days where you’d like to hear a few last suggestions.

**4:15pm – 4:30pm  
CLOSING REMARKS**

**Questions:** Please contact [nancy.juc@gmail.com](mailto:nancy.juc@gmail.com)

**Register:** Visit <http://www.jackrabbitclass.com/conferences.asp>

