How to Use Subscription Analytics (Members, Retention, Trial Conversions and Monthly Reports)

Subscription Analytics shows how your recurring subscription classes are doing: active members, new joiners, direct signups, trial conversions, cancellations, retention, attrition, growth and capacity. Club admins can also email staff a monthly spreadsheet and a short PDF glance. Parents never receive that email. Only club admins can open this page.

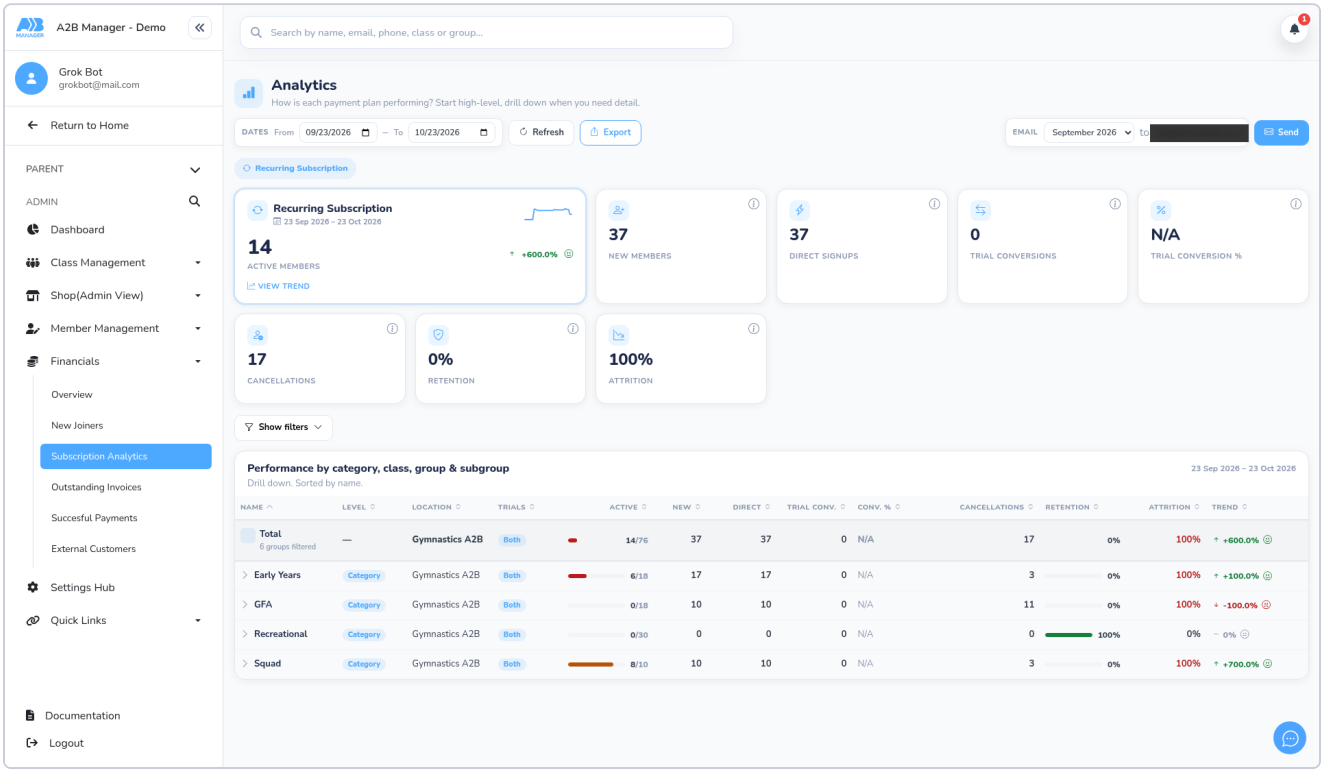
Before you start

- You need to be a club admin.
- You need at least one recurring subscription class or group.
- For the monthly email (or to use **Send** on the page), open **Settings Hub** > **Communication** > **Email Template Builder** > **Analytics** > **Subscription Analytics**, turn the template **Active**, and set a **Staff email address**.
- The automated email runs at **06:00 UK on the 1st of each month** and covers the previous calendar month.

Using Subscription Analytics

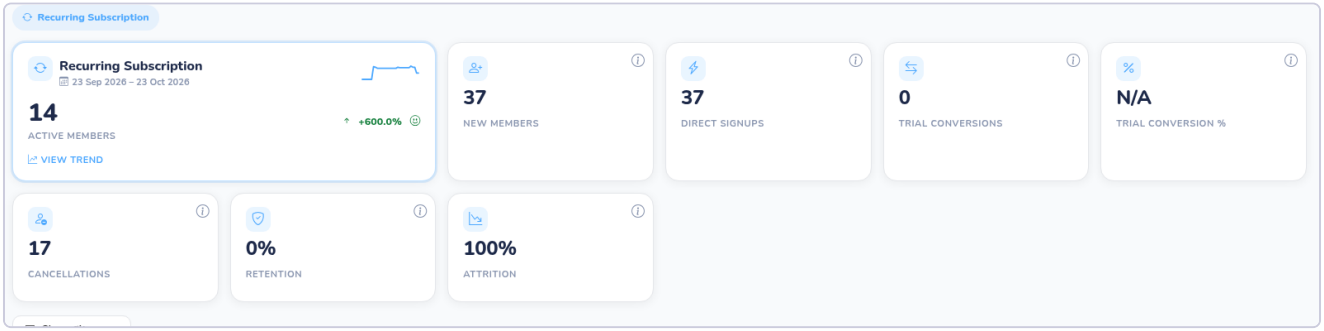
1. Open Subscription Analytics (0:00)

- In the left-hand menu, click **Financials**, then **Subscription Analytics**.
- The page is headed **Analytics**, with the subtitle **How is each payment plan performing? Start high-level, drill down when you need detail.**
- The chip **Recurring Subscription** shows that this report is for recurring subscription classes only.



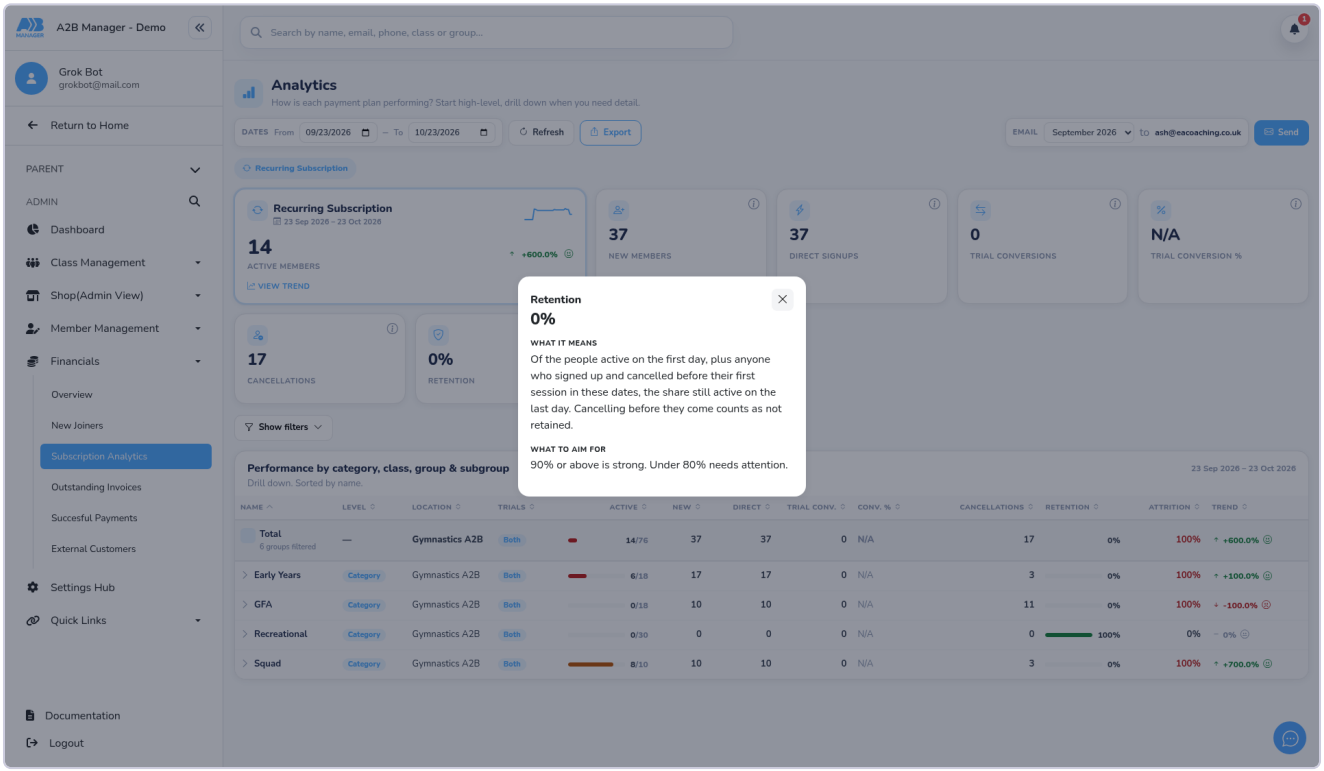
2. Read the main metrics (0:15)

- Across the top you'll see **Active members** (with **View trend**), **New members**, **Direct signups**, **Trial conversions**, **Trial conversion %**, **Cancellations**, **Retention** and **Attrition**.
- Each metric has a **What does … mean?** info control. Open it for a short **What it means** and **What to aim for** note.
- **Active members** — how many members are enrolled on the end date of your date range.
- **New members** — enrolments whose first lesson falls in your date range.
- **Direct signups** — new members who joined straight onto a subscription (not counted as a trial conversion).
- **Trial conversions** and **Trial conversion %** — new members who converted from a trial, and conversions as a share of trials in the range (or **N/A** if there were no trials).
- If a child did a free trial on one class row (trial date set, no first lesson, then closed) and later took a paid place on a **different** class row for the same child and group (first lesson set, no trial date), that paid join still counts as a **Trial conversion**, not a **Direct** signup. The report looks for an earlier closed trial for that child on the same group.
- **Cancellations** — enrolments whose last lesson falls in the range.
- In the table, **Active** can show fill against capacity. When you filter by subgroup, coach or gender, a subgroup keeps its **share of the group's capacity** (capacity is split evenly across coaches). Filters hide rows; they don't rewrite those shares.
- The table is headed **Performance by category, class, group & subgroup**, with columns including Name, Level, Location, Trials, Active, New, Direct, Trial conv., Conv. %, Cancellations, Retention, Attrition and Trend.



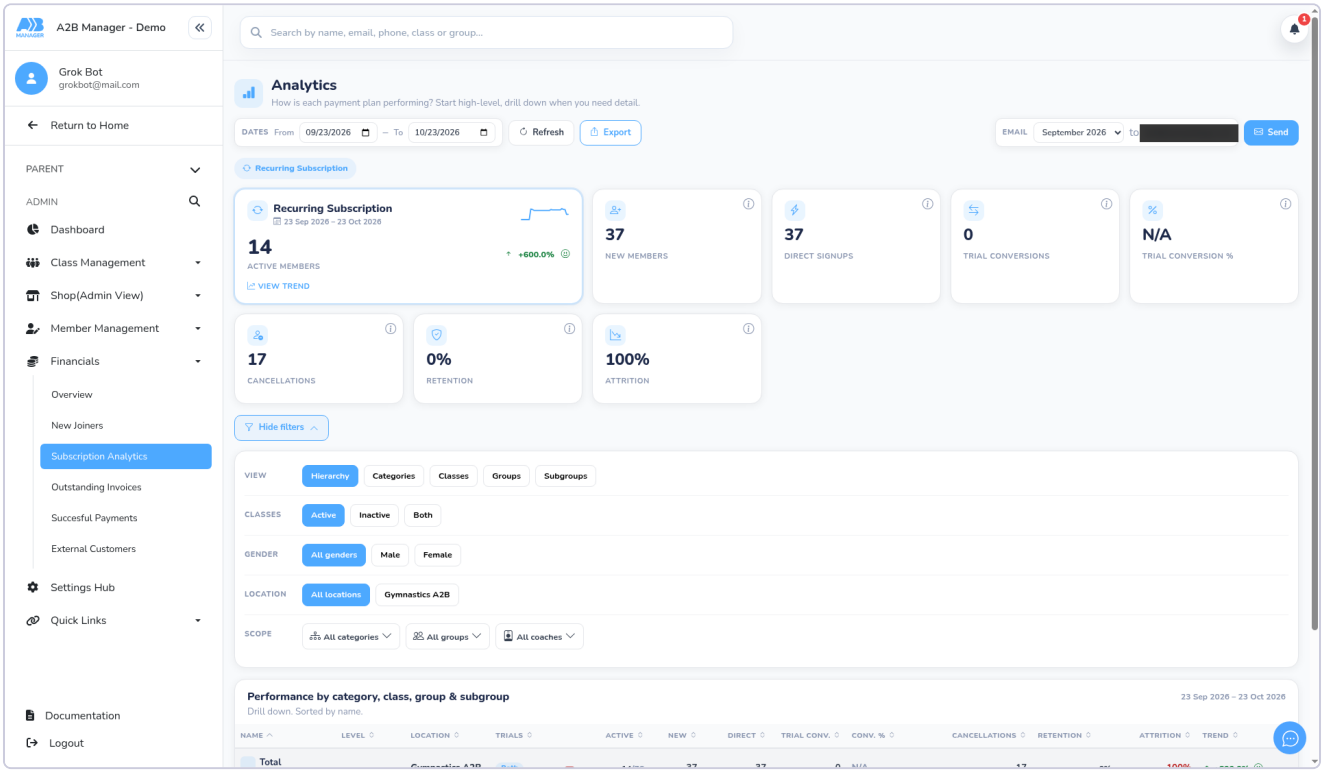
3. Check Retention (and cancel before first session) (0:50)

- Open the info control on **Retention**.
- **What it means:** Of the people active on the first day, plus anyone who signed up and cancelled before their first session in these dates, the share still active on the last day. Cancelling before they come counts as not retained.
- So if someone cancels before their first session or attendance, Retention treats that as **0%** retained for them — not 100%.
- **What to aim for:** 90% or above is strong. Under 80% needs attention.
- **Attrition** is 100% minus Retention (aim under about 10% as a healthy guide on the page).



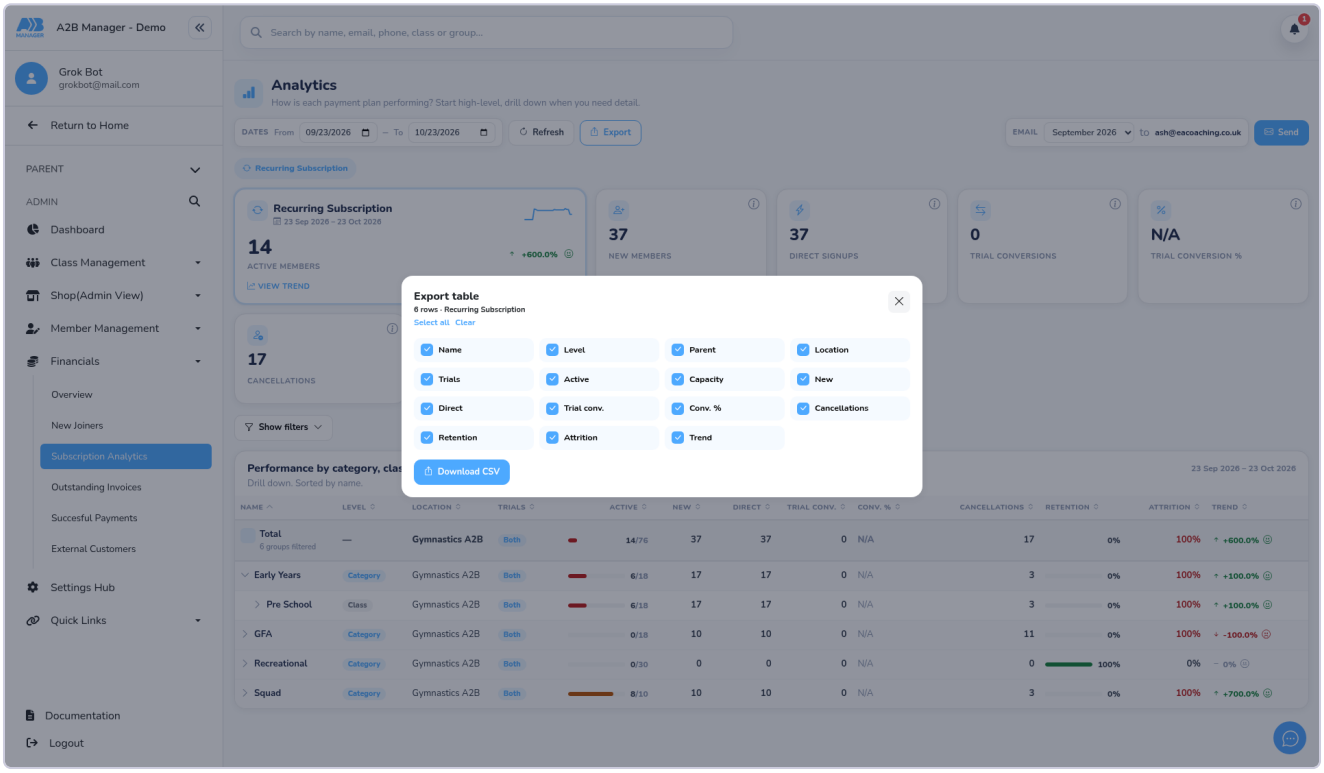
4. Set the date range and filters (1:11)

- At the top, set **From** and **To**. By default this is about the last month up to today. Click **Refresh** to reload the latest data.
- Use **Show filters** / **Hide filters** (a badge shows how many filters are active).
- **View** — Hierarchy (default), Categories, Classes, Groups or Subgroups.
- **Classes** — Active, Inactive or Both.
- **Gender** — All genders, Male or Female.
- **Location** — All locations or a named site (and Multi Location where a group uses more than one).
- Narrow further by category, group or coach scope.
- If nothing matches, you'll see **No recurring subscription classes match these filters.**



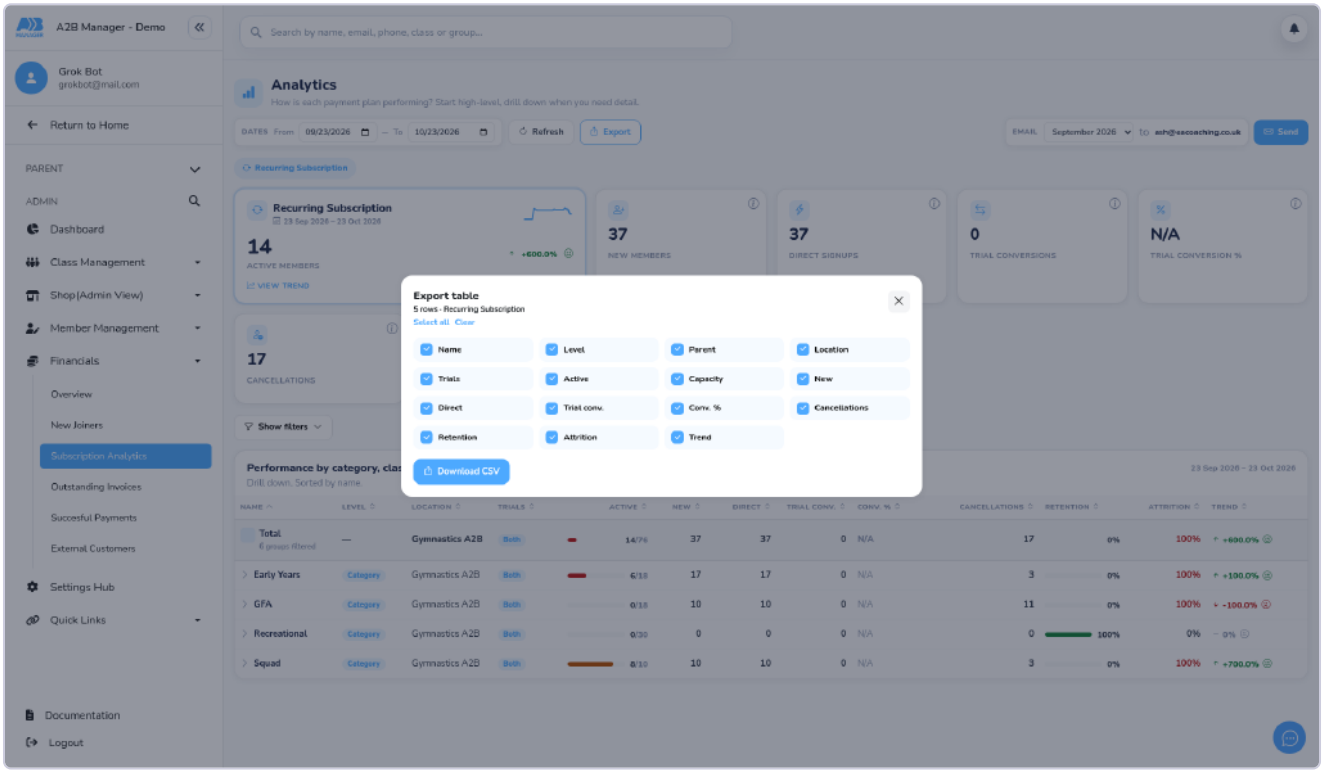
5. Drill down the hierarchy (1:28)

- In Hierarchy view the table runs **Total → Category → Class → Group → Subgroup**. A subgroup is a coach slot; members with no coach show as **Unassigned**.
- Click the chevron on a row to expand or collapse its children. The Total row is always there.
- Groups are listed **Monday to Sunday** by their earliest session time, then by name.
- Click a column heading to sort.



6. Export the table (1:43)

- Click **Export** to open **Export table**.
- Tick the columns you want (including **Capacity** if you need it), or use **Select all** / **Clear**, then download the CSV.
- The file covers the rows currently on screen (your view, filters and expand state).
- Typical columns: Name, Level, Parent, Location, Trials, Active, Capacity, New, Direct, Trial conv., Conv. %, Cancellations, Retention, Attrition and Trend.

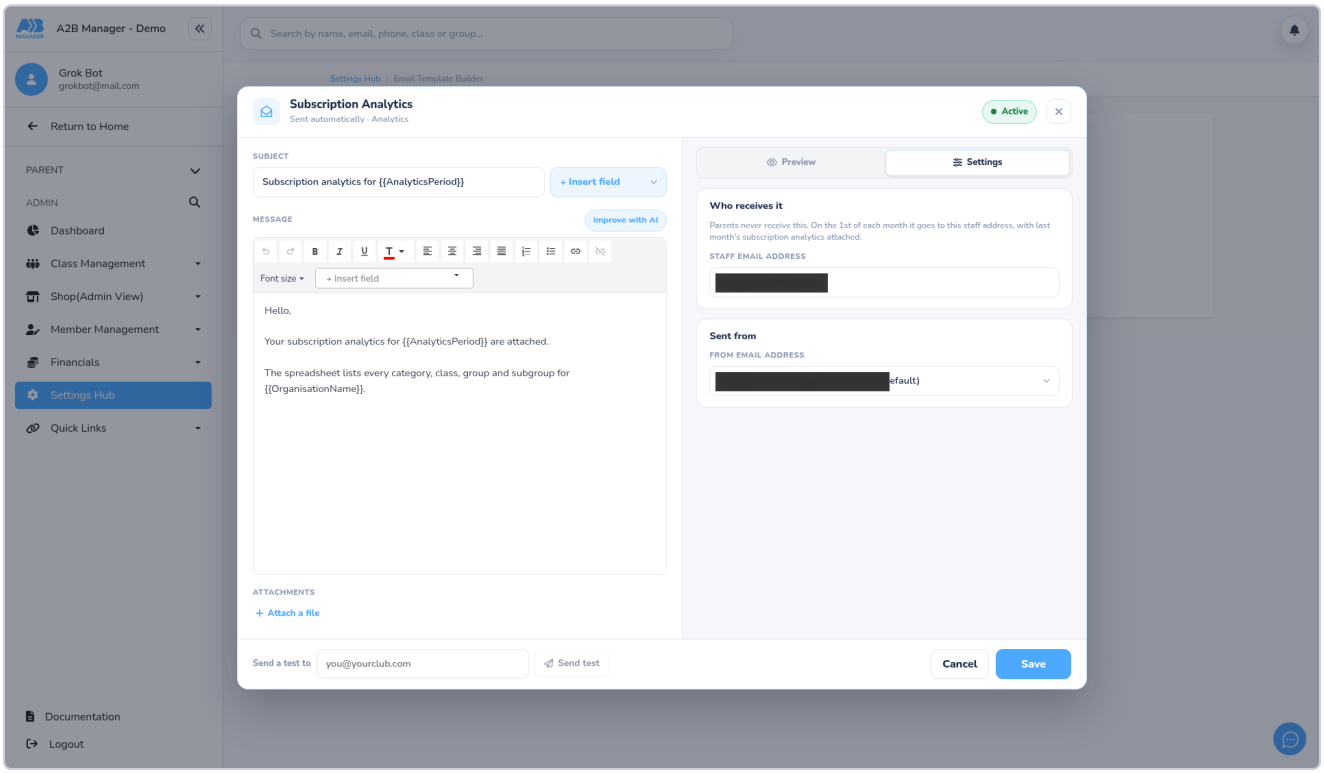


7. How the monthly staff email works (1:54)

- On the **1st of each month at 06:00 UK**, A2B Manager emails the **previous calendar month** to the staff address on your Subscription Analytics template.
- **Parents never receive this email.** It only goes to the staff address you set.
- The email attaches a full spreadsheet of the hierarchy and a short PDF called **Subscription analytics glance**.
- The PDF opens with a bottom-line summary and a club snapshot, then categories and classes, groups to watch, coaches (including Unassigned), and suggested next steps.
- The default subject pattern is **Subscription analytics for {{AnalyticsPeriod}}**. Useful tags include **{{AnalyticsPeriod}}** and **{{OrganisationName}}**.
- Each full month is only sent once for that period once the send has completed successfully.

8. Set the staff email address (2:17)

- Go to **Settings Hub** > **Communication** > **Email Template Builder**.
- Open the **Analytics** category, then **Subscription Analytics**.
- On the **Settings** tab under **Who receives it**, enter the **Staff email address**.
- The page reminds you: parents never receive this; on the 1st of each month it goes to this staff address, with last month's subscription analytics attached.
- Turn the template **Active**. The monthly report is not sent until the template is on and a staff address is filled in.



9. Email a past month from the page (2:05)

- On Subscription Analytics, the **Email** strip sits beside the dates toolbar.
- Choose a **Month to email** from the list (the last 12 months, including the current month). The default is the previous month.
- The strip shows the staff address from your template (or that no staff address is set yet).
- **Send** emails that month's spreadsheet and PDF glance to the staff address when the template is Active and an address is set. Parents never receive it.
- Only use **Send** when you intend to email your club's staff for that month. If the staff address isn't set, add it on the template first (Step 8) — the page will tell you if the template is missing, inactive, or has no staff address.
- If you choose the current (in-progress) month, the report runs up to today.



Good to know

- This page covers **recurring subscription** classes only — not PAYG or one-off bookings.
- Cancelling before the first session counts as not retained (Retention 0% for that person in the cohort), matching the Retention info text on the page.
- A free-trial-to-paid path that uses two different class rows for the same child and group still counts as **Trial conversion**, not **Direct**.
- The automated email and the on-page **Send** both use the same staff template, spreadsheet and PDF glance.
- Filtering to one coach or subgroup keeps that slot's share of group capacity; it does not reallocate the whole group's places to the filtered row.
- If you don't see the Subscription Analytics template yet, add it under **Analytics** in the Email Template Builder (or generate default templates if your club is new).

> **Tip:** Put a shared office or treasurer address on the template if more than one person needs the monthly pack — parents will never be emailed this report by mistake.