

ZEN PLANNER MIGRATION ROADMAP

Most owners dread the switch, and it's usually easier than they expect. The one part that bites is the calendar: Zen Planner wants 30 days' notice, and you owe fees through the cancellation date. Plan backward from the day you want to be off it.

Gym: _____

Moving to: _____

Owner: _____

YOUR DATES fill these before anything else

MILESTONE	DATE	HOW TO SET IT
Last day on Zen Planner		Pick this first. Every other date works back from it.
Submit the Cancellation Request Form		At least 30 days before the date above. Fees run through the cancellation date.
Data export done		Before you cancel anything. Before you import anything, too.
Parallel week starts		New platform set up and imported. Both systems live for one week.
Member email goes out		Before members hit the new app or login for the first time.
Go-live on the new platform		After the parallel week checks out. Budget one to two weeks for the whole transition.

THE SIX STEPS in order; tick a box only once the step is finished

#	WHAT TO DO	WHO	DUE	DONE
1	Export your data from Zen Planner as CSV files. ☐ Member records ☐ Billing history ☐ Attendance logs ☐ Other: _____			☐
2	Pick your new platform and get its support team on the import. Don't figure it out alone. Hand them the CSVs and ask about payment tokens now (see the box below).			☐
3	Run both systems in parallel for a week. ☐ Data imported ☐ Billing tested ☐ Scheduling tested ☐ Row counts match (table below)			☐
4	Train your staff. Front desk and coaches: _____			☐
5	Tell your members. One email: what's changing, and what they need to do. Usually that's download a new app or update their login.			☐
6	Cancel Zen Planner. ☐ Setup → Account Info → Cancel ☐ Form received by email (or ask Support) ☐ Submitted with 30 days' notice			☐

DID EVERYTHING COME ACROSS? count rows before export and after import; any gap gets fixed during the parallel week

DATA SET	ROWS IN ZEN PLANNER	ROWS AFTER IMPORT	MATCH	NOTES (MISSING FIELDS, DUPLICATES, FAMILY LINKS)
Members			☐	
Billing history			☐	
Attendance			☐	
			☐	
			☐	
			☐	

Payment tokens take coordination. If you use Zen Planner's integrated payment processing, stored cards are the one piece that may not travel with the CSVs. Ask the new platform's support team how token migration works before you start, and write the answer here:

Before you sign anything, check the full cost. Zen Planner's base plan runs \$99 to \$267 a month by member count. Add the marketing module, branded app, and website and a 200-member gym lands at \$546 or more a month. Price the new platform the same way: base plan plus every add-on you'd actually use.

New platform, all-in monthly: \$_____