Spirit Rock

Spirit Rock streamlines operations, saves time & empowers growth.

How this top meditation retreat center freed themselves from a mountain of tedious manual processing.

Meet Spirit Rock Meditation Center

Spirit Rock is a California-based meditation retreat center that offers a wide array of programs in a variety of formats, including in-person and online.

From two-hour drop-in classes, daylong events and multi-day retreats to silent residential retreats lasting up to 2 months, plus advanced practitioner programs spanning a year or more, Spirit Rock's offerings are diverse and their operational needs are complex.

> *It was time to start using the right tool for the right job. [Retreat Guru is] in our industry and you met our needs."*

The Challenge

Given the breadth of programs offered & the high volume of registrations seen, Spirit Rock was experiencing increasing complexity operating the center efficiently.

The software Spirit Rock was using to manage operations was donor management software, and it was ill-suited for the complexity of their retreat center.

"Before RG, there was so much manual intervention - a registrar had to complete every registration, copying and pasting emails, waiting lists were done in a spreadsheet, cancellations needed to be processed by accounting. And, those manual processes were very complex. Plus, it took a very long time to train new registrars"

Every single task was a multi-step manual process:

Registrations were a "big to-do." A registrar had to complete every registration individually.

Inventory Management was a headache. Each program had to be closely monitored to ensure they didn't oversell their programs because they lacked the automation necessary to shut off registration.

Payments had to be manually split so that the donation portion could be identified and parsed out.

Communications couldn't be templated, automated or scheduled, so the team had to copy/paste and manually send confirmation emails and customer communications.

Cancellations were cumbersome and often left customers waiting for days to receive a refund.

Waitlists were managed by a spreadsheet. After a program was filled, Spirit Rock allowed customers to download a paper form to add themselves to the manual waiting list.

The Path Forward

They knew something had to change.

"With the time it takes to get people up to speed after hiring, our demands were increasing and we were at max capacity because so much was manual."

The team at Spirit Rock began to explore their options.

> "We didn't want custom-developed software. It wouldn't fit our model. Bespoke software is not economical. We couldn't afford the people and resources needed to sustain self-supported, developed software, and we couldn't keep it working even if we did develop it," said a Spirit Rock team member. "Our requirements analysis included 500+ use cases!"

The Solution

Before Retreat Guru, Spirit Rock felt like they were operating their center in some significantly outdated ways.

> "We kept falling further behind. It was time to start using the right tool for the right job."

With Retreat Guru's booking software, Spirit Rock was able to free up precious time from their Registrar's schedules to focus on customer service and get more important things done.

Spirit Rock wound up with a flexible software built specifically to meet the unique and complex needs of retreat centers.

The Results

"With Retreat Guru, new staff become proficient in much less time. Our customers are able to register easily and accurately online."

From quickly processing payments and taking registrations without manual intervention, to automating confirmation, pre-arrival and post-departure emails, and streamlining the cancellation and waitlist processes, Spirit Rock finds:

"Retreat Guru is very flexible. We can do just about anything we need to do."

The Results

According to Spirit Rock, Retreat Guru has helped scheduling become "heavenly," a great step forward from the manual, hands-on, spreadsheet-based headache it was previously struggling with.

A huge bonus for Spirit Rock's leadership team is the benefit to Spirit Rock's staff. "Our staff is happier and more successful. They can do more, faster and easier".

Reducing overwhelm for registrars has helped existing staff members become more engaged and content at work, and provides a better onboarding experience for new hires as well.

> *"New staff have become proficient [with Retreat Guru] in a much shorter time than with our previous system. The old system took too long to train our people. The learning curve for new registrars is much less now."*

The Spirit Rock team receives excellent support from the team at Retreat Guru.

"Support. That's what separates Retreat Guru from other companies we've dealt with. We feel very well taken care of. It's a relationship, a partnership, not us versus them."