



Fitness Center Membership Cancellation Support Checklist 2026

Initial Inquiry & Identity Verification

Validate the member's identity and confirm the specific membership plan details before proceeding with any changes.

Member Full Name

Write something...

Membership ID Number

Write something...

Date of Inquiry

Enter date...

Verification Method Used

- ☐ Photo ID Scan
- ☐ Security Question Response
- ☐ Email Confirmation Link
- ☐ Phone OTP

Notes on Identity Discrepancies

Write something...

Agent Verification Signature

Reason for Cancellation Assessment

Document the primary reason for leaving (e.g., relocation, injury, cost) to identify patterns for retention strategies.

Primary Reason for Cancellation

- ☐ Relocation
- ☐ Financial Constraints
- ☐ Injury or Health Issues
- ☐ Dissatisfaction with Facilities
- ☐ Lack of Usage
- ☐ Moving to a Competitor
- ☐ Other

Contributing Factors

- ☐ Pricing/Membership Cost
- ☐ Operating Hours
- ☐ Class Availability
- ☐ Equipment Maintenance
- ☐ Staff Professionalism

Detailed Member Feedback

Write something...

Date of Cancellation Request

Enter date...

Side Effects Assessment

Identify any applicable notice periods, contract end dates, or early termination fees required by the membership agreement.

Primary Reason for Cancellation

- ☐ Relocation
- ☐ Financial Constraints
- ☐ Injury or Health Issues
- ☐ Dissatisfaction with Facilities
- ☐ Found another gym
- ☐ Other

Attempted Retention Offers

- ☐ Membership Freeze/Pause
- ☐ Discounted Monthly Rate
- ☐ Plan Downgrade
- ☐ Personal Training Trial

Early Termination Fee Amount

Enter a number...

Effective Cancellation Date

Enter date...

Detailed Cancellation Notes

Write something...

Staff Confirmation Signature

Retention & Alternative Offer Implementation

Execute approved retention protocols, such as offering membership freezes, downgemma downgrades, or promotional rate adjustments.

Primary Retention Strategy Used

- ☐ Membership Freeze/Pause
- ☐ Plan Downgrade (Basic Tier)
- ☐ Discount/Promotional Rate Offer
- ☐ Referral Credit Incentive
- ☐ No Retention Attempt (Member Insisted)

Discount Percentage Offered

Write something...

Effective Date of New Offer

Enter date...

Follow-up Required Actions

- ☐ Update CRM Record
- ☐ Notify Billing Department
- ☐ Send Confirmation Email
- ☐ Schedule Re-engagement Call

Member Feedback on Offer

Write something...

Staff Member Authorization

Financial Settlement & Final Billing

Calculate outstanding balances, process final monthly dues, and ensure all automated recurring payments are successfully halted.

Final Outstanding Balance

Payment Method Used

- ☐ Credit/Debit Card
- ☐ Bank Transfer
- ☐ Direct Debit
- ☐ Store Credit

Payment Processing Date

Included Settlement Items

- ☐ Monthly Membership Fee
- ☐ Late Payment Penalty
- ☐ Early Termination Fee
- ☐ Unreturned Equipment Fee

Payment Receipt/Invoice

 Upload File

Staff Verification Signature



Access & Equipment Retrieval

Disable gym access credentials, deactivate mobile app permissions, and coordinate the return of any leased locker or equipment.

Returned Items List

- ☐ Gym Key Fob/Access Card
- ☐ Locker Key
- ☐ Leased Fitness Equipment
- ☐ Member ID Card
- ☐ Uniform/Staff Apparel

Date of Access Deactivation

Enter date...

Staff Member Name

Write something...

Condition of Returned Equipment

Write something...

Staff Verification Signature

Account Closure & Confirmation

Update the CRM/Database, issue a formal cancellation receipt via email, and send a final satisfaction survey.

Cancellation Effective Date

Enter date...

Cancellation Status

- ☐ Completed
- ☐ Pending Notice Period
- ☐ Escalated to Management

Confirmation Reference Number

Write something...

Post-Cancellation Tasks Completed

- ☐ CRM Updated
- ☐ Email Receipt Sent
- ☐ Auto-Pay Disabled
- ☐ Access Key Deactivated

Final Support Agent Notes

Write something...

Support Agent Authorization

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✓ Finish

🔗 Generate Sample Report