Mindbody Technical Handoff Worksheet

For fitness and wellness businesses using Mindbody. Use the blank space to organize the details that matter to your team.

OPTIONAL: Completing this worksheet is not required to request service. You can submit the public guided form directly at https://mbtechadvisor.com/request-service.

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1. Business details

Business name

Business type

Business location or locations involved

2. Workflow or issue

Describe the situation in your team’s words. Leave any prompt blank if it does not apply.

What is happening?

What did you expect to happen?

What has your team already tried?

3. Related systems and integrations

What connected tools or systems are involved?

How does work or information move between them?

Which Mindbody account, locations, or teams are affected?

4. Desired outcome

What outcome are you hoping for?

What would a useful resolution change for your team?

This worksheet is optional. You can request service directly at the KestrelBench form shown above without completing it.