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# Get your PT paperwork into shape!

## **RUNNING YOUR OWN PERSONAL TRAINING**

**BUSINESS** requires training skills, a basic business sense and proper documentation to back up the day to day needs of your business. Occasionally, misunderstandings between client and trainer occur when unclear communication exists regarding training policies and procedures or there is limited discussion regarding a client's goals and expectations. With the correct written materials, many of these potential problems can be avoided. Additionally, creating and implementing effective marketing pieces is an essential component to growing your business; professional looking documents reflect well on you and your company. Allocating time to analyse your training business requirements and producing eye catching forms and documents is time well spent.

## **Marketing materials**

Getting your business up and running obviously requires a client base. Although referral systems are the least expensive and easiest way to drum up new business, it is still important to continually market yourself and your training business. A name for your business - whether it is your own or something creative - becomes your business signature. An accompanying logo or simply the name itself should appear on any and all forms you create.

The first key marketing piece to produce is an information flyer. Your budget will dictate how elaborate or basic this piece is and you may wish to invest in the assistance of a graphic designer. In doing so, you would be responsible for coming up with the text and the designer would assist in developing the creative look of the flyer. To ensure the longevity of the flyer forgo listing information that could potentially change, such as training price rates. The flyer should include your biographical information, a tasteful photo of yourself, listed benefits of personal training, client testimonials, a hook to get the reader interested in training, and information on how to contact you. Other materials to include in your marketing repertoire are a business card, price sheets and if possible, a website. A business card is a reflection of your business so a well-thought out and properly designed card can be as valuable as a flyer (for more information on the value of business cards read Mark Kostner's article on page 19). The back of a business card is also an excellent spot to list a client's future appointments. A personal training rate sheet should be a separate document that can fit into the marketing flyer and be easily and inexpensively updated from time to time. Lastly, a website is an excellent marketing tool. An informative and well maintained website is also an additional perk for your current clients and should provide links to exercise related websites, free fit tips, program ideas and downloadable resource materials.

## **Invoices and receipts**

Once a client has confirmed that they will be personal training with you, it is wise to request payment prior to the sessions commencing. Whether you use a pre-formatted receipt book or opt for a client specific invoice, some record of payment is necessary. When creating an invoice template, ensure that your company name and logo, address, phone number, and payment details are listed. These items remain standard on each invoice. To individualise an invoice, include the date, client's name, address and contact information, invoice number, type of sessions purchased and the total amount due. Once payment is received, the invoice should be stamped 'paid in full' and filed for future reference.

## **Information and goal setting forms**

As personal trainers, we are all familiar with the importance of goal setting. Although we could discuss a client's training desires during their first appointment, it is more effective to have the client reflect on their goals prior to their first session. A well designed information and goal setting sheet should be given to the client when they make their initial enquiry about your personal training services, and completed prior to training. Although generic goal setting sheets are available for purchase, it is advantageous to design a form that personally reflects the information you would like to gather. Including basic information such as name, telephone numbers (work, mobile and home) and e-mail addresses are a given. Additionally, the client information form should include an emergency contact, doctor's name and phone number, birth date, Par-Q (Physical Activity Readiness Questionnaire) and any current or past injuries that may hinder their ability to exercise. Other lifestyle questions regarding stress levels, sleeping and nutrition patterns and whether a client smokes help round out the basic background information. Questions about a client's current exercise regime which answer the F.I.T.T. acronym (frequency, intensity, time and duration of exercise and type) and a 1 to 10 rating scale of how fit they believe they are, summarise and complete the fitness profile. In addition to basic goal setting questions, include a section that acknowledges potential obstacles to a client's training success. This type of information becomes extremely valuable in assessing possible roadblocks to goal attainment. It also allows the trainer and the client to address and develop joint strategies to overcome these obstacles.

## **Personal training contract**

A personal training contract is an important form to include in your repertoire of training documents. It is a written

document stating the policies and procedures between trainer and client. Policies such as 24 hour cancellation charges, fees for no shows, lateness procedures, payment requirements and any other important policies such as a client's disclosure of prior injuries and acknowledgement of up-to-date insurance coverage should be written out and reviewed with every new client. Once each item has been discussed and agreed upon, the contract should be signed by both parties and a copy given to the client. If you are unsure of how to write a contract, begin by listing all items that reflect the needs of your business. Next, ask a neutral party to read through the document for clarity. Finally, it may make good business sense to have a lawyer review the document - especially if you plan to abide by the contract.

### Program cards

There is a wide range of program cards available for use by personal trainers. Because each trainer has a unique style for recording a client's reps, sets and exercise regime, the best program card is the one that you create yourself. When designing a card, keep in mind how it will be used. For example, the size of the card will be dependent on how much detail is wanted and how the information will be recorded. Cost will also become a factor in card design. Using a new program card every few sessions with a client can be expensive - plus a client's file will be filled fairly quickly with completed program sheets. Regardless of the style of program card that you end up designing, it is important that you do have one; writing out a client's program on loose pieces of paper is unprofessional and does not reflect well on you.

### Client handouts

In addition to developing day-to-day work sheets and marketing materials for your personal training business, it is also handy to keep a collection of fitness and health related handouts. You may also want to create your own handouts with information that is valuable for your clients and/or answers frequently asked training questions. Topics like sticking with an exercise program and exercising properly, as well as written materials for tracking workouts, accountability sheets, and referral lists of reputable health professionals such as local physiotherapists and dietitians are just a small sample of the types of handouts that can build into a valuable, and value-enhancing, resource library. Although there is a great deal of fitness related information on the internet, doing the research on the behalf of your clients is a nice gesture and saves them time. Providing clients with complimentary resources via handouts positively adds to a client's overall personal training experience.

### Client sign-in sheets

Although a client sign-in sheet is a simple one page form, it is a valuable piece of paper. Acting as a register of attendance, it is a security method to keep track of personal training sessions. When developing a client sign-in sheet, leave a space for the client's name, your name, date, number of sessions purchased and package expiry date at the top of the page.

### SAMPLE CLIENT SIGN-IN SHEET

**Client:** Jane Doe      **Trainer:** Krista Popowych  
**Start Date:** 26 April, 2007  
**Package:** 10 x 60 minute sessions  
**Package Expires:** 26 October , 2007

Session #	Date 2007	Client signature	Trainer initial
1/10	26 Feb	Jane Doe	KP
2/10	4 Mar	Jane Doe	KP
3/10	11 Mar	Jane Doe	KP
4/10	18 Mar	Cancelled <24 hrs	Charge JD : KP
5/10	25 Mar	Jane Doe	KP
6/10			

Next, a 4-column table would complete the document. The columns are designated to record the training session number, date, client signature and the trainers initial. This type of tracking and signature system eliminates discrepancies between the number of personal training sessions used and paid for.

Because clients are paying for a professional service, it is important that all aspects of their training experience, including the paperwork, are top notch. Enhance your personal training business by creating and using documents that make your job easier and the client's experience more memorable. ■



#### Krista Popowych, B.HK

A former Canadian Presenter of the Year and co-host of CWO Fitness TV, Krista is the CEO of KP Fitness Multimedia. As a fitness and personal trainer specialist, master trainer for Keiser Cycling and MIO™, associate editor for FBC magazine and one of IHRSA's 2006 top 25 up-and-coming executives, she is a highly sought after fitness professional who loves to inspire others through education and movement.



**20-22 April 2007**  
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Be deluged with business and training ideas when you tap into Krista's reserves of personal training knowledge at her FILEX 2007 sessions. Choose from:

- ◆ Partner stretching for PT clients (A1D)
- ◆ Divorcing your clients and other tricky training situations (A3G)
- ◆ Advanced cardio ideas (B3G)
- ◆ Outlast, outspin, outride (C1G) (Cycle Plenary)
- ◆ Building your client base from the ground up (PT Breakfast – \$65pp or included in PT Gold Pass)

**Krista will also be delivering a session at the inaugural Personal Trainer Summit on Thursday 19 April:**

- ◆ How to be an extraordinary leader

For program information see pages 12 to 15 and 17 of your FILEX brochure, or visit [www.fitnessnetwork.com.au/FILEX](http://www.fitnessnetwork.com.au/FILEX) where you can also register online.

**REMEMBER – you'll save \$\$\$s if you register as an Early Bird by 5 March!**