

Personal Training – Assessment Tool

This Assessment Tool provides a framework for the meaningful evaluation of personal training programs. Based on over a decade of consulting with clubs in the area of private training, I have found the following to be key considerations of prolific personal training programs. These are:

- I. Brand Philosophy
- II. Premium Member Demographics
- III. External & Internal Marketing
- IV. New Member On-boarding Process
- V. Distinctive Assessment Protocol
- VI. Strategic Pricing & Packaging
- VII. Professional Processes & Systems
- VIII. Quality Training Team
- IX. Competitive Compensation
- X. Favorable Facilities
- XI. Intentional Equipment
- XII. Cultural Significance

Typically, high performing clubs that generate significant profits from personal training score well in most, if not all, of these strategic areas. Honestly evaluating your organizations status in each arena will offer insight regarding elements that may need attention. Remember to rank your answers based on how these components specifically relate to personal training.

Assessment Scale:

- 1 = Poor (does not support training at all and may be an obstacle)
- 2 = Fair (neutral, does not detract from training, but does not enhance it either)
- 3 = Good (basics are in place for average performance, comparable to competitors)
- 4 = Very Good (commensurate with general industry standards and provides advantages)
- 5 = Great (equal to “best practices” and industry leading)

- I. **Brand Philosophy** Score: _____

Clubs that excel in private and group training do so in large part because they choose to focus on these offerings. This begins with clarity around the vision, support from Owners, and commitment throughout the highest levels in the organization. Ideally, resources of all kinds are allocated toward these central priorities – space, facilities, equipment, manpower, marketing, advertising, promotion, staff education, policies, systems, and perhaps most importantly effort.

II. Premium Member Demographics Score: _____

Despite the mainstream status of personal training, for most individuals it remains a “discretionary expense” and therefore requires some level of “discretionary income”. Research validates the not-surprising profile of those most likely to engage in personal training and clubs that already attract a similar target audience for membership will almost always be more successful than those that do not.

III. External & Internal Marketing Score: _____

All clubs, especially those well established in a given community, develop a certain reputation whether through conscious effort or not. Externally, they are invariably perceived to be “the place to go” for ... tennis, the latest classes, families, yoga, a friendly staff, performance training, programs, etc. Internally, it is often readily apparent where a clubs’ priorities lie as well, based on use of space, placement of services, promotional materials, amenities, website design, and other factors.

IV. New Member On-Boarding Process Score: _____

A strategic, thoughtful process to connect new members with training is absolutely essential. Invariably, this is the mechanism that provides the vast majority of clients for trainers. Although it is a common expectation for trainers to attract their own clients through referrals, working the floor, and other initiatives, these seldom produce enough clients without a sales funnel process provided by the club.

V. Distinctive Assessment Protocol Score: _____

The assessment tool used in the on-boarding process is critically important. It should reinforce the value of receiving expert assistance for training. Old school assessments (height, weight, circumference measurements, body fat, BMI, etc.) do not do this. Although this data is helpful to the member and should be included for baseline and goal setting reasons, it does not demonstrate the value of customized training. Numerous assessment tools that work well are available – almost all of them based on some version of the FMS (functional movement screen).

VI. Strategic Pricing & Packaging Score: _____

Finding the right combination of pricing and packaging can make a tremendous difference in the success of training programs, and more specifically profitability of those programs. More and more clubs are realizing the efficacy of automatic billing for training services – either by “charge to account” or billing for a set number of sessions in advance each month. Constantly re-selling packages as they expire is like having to re-sell a membership every month – it requires an ongoing concerted effort from both parties.

VII. Professional Processes & Systems Score: _____

Without exception, large clubs that do well with private and group training have in place strategic processes that are aligned with specific goals of the department. Structure, staff training, teamwork, management by objectives, budgeting, accountability, and service are all outcomes that require a systematic approach to achieve consistency. If over time, only a select few trainers maintain a high degree of success, while the majority muddle along in mediocrity, it is often a sign of weak organizational support.

VIII. Quality Training Team Score: _____

As with any other position, people make the difference. A good training team is just that – a team. They are qualified, passionate about helping others, loyal to the organization, committed to continual learning, always in uniform, and preferably full-time rather than “hobbyist” training “on the side”.

IX. Competitive Compensation Score: _____

Effective compensation plans for trainers include the ability to earn increases in pay based on overall performance as an employee, production, continuing education, meeting goals, creating demand for services, performing to budget, teamwork, and tenure. Criteria for moving up the pay scale should be clearly defined in advance. In addition, the plan should allow trainers to increase the rate charged for their services and include bonus components to incentive desired behaviors.

X. Favorable Facilities Score: _____

Clubs should put their most valuable resources, such as space, where their priorities are. Allocating well-designed, appropriate spaces that are conducive to training is important for private, semi-private, and small group training.

XI. Intentional Equipment Score: _____

Observe the fitness floors in any club and you will see trainers gravitating to certain equipment – typically functional training tools, dumbbells, cable stations, free weights, TRX, multi-station platforms, etc. Providing the right resources to support training activities makes a difference.

XII. Cultural Significance Score: _____

Every club has a “culture” that speaks volumes about not only what the club values, but also the clubs value proposition. The staff, members, prospects, and even the surrounding community associate certain characteristics with clubs – local, trendy, multi-purpose, senior membership, tennis, social, friendly, etc. These things are inherent and evident, even without having to tell people. It is so obvious that it is part of the clubs DNA.