

New Client Intake Process

The primary ways for people to contact us to start training is to contact us through:

- Phone – leaves Google Voice Mail Message
- Getting Started Form from the website
- Walk-in – treat this as your first conversation with them

If they contact us through the website or voicemail, the manager or an assigned coach will make first contact over the phone to schedule an Introduction.

This first conversation at the Introduction session is the time to see if they are a good fit for us, and we are a good fit for them.

The First Conversation

The purpose of the first conversation is to determine if they are a good fit for us, and that we are a good fit for them. We need to find out some basic information about them, and this gives us an opportunity to establish rapport. The purpose of this conversation is to schedule an Intro Class when we uncover a good fit to continue the conversation.

Establish Rapport and Find Out More

When talking to a prospect for the first time, use these questions to establish rapport and find out more information about them. During this conversation, take your time and try to find something that you have in common with them. The more relatable you are, the better we can communicate with them.

- Do they know what functional fitness training is? Do you have a friend or family member that does CrossFit? Where?
- How did you hear of us? (get specifics!)
- Do they live/work close by – do they know where we are?
- How often and what time do they think they would train normally? (Make sure there is a class that works for them. Make sure they intend to train at least 2x a week)

We have found that some client's travel schedule or where they live / work are not good fits for us. It is fine to suggest another facility if you uncover that they travel more than 50% of the time or live further than 5-7 miles away.

Be prepared to explain what functional fitness training is. Many people will want to understand what we do in class.

- A good way to get fit that anyone can do; you don't have to get in shape first
- A workout that we can tailor for all abilities through learning the basics and progressions for each movement
- Training that can be adjusted to you to help you meet your individual goals
- A highly structured and coached class environment where we get people stronger and make them into (better) athletes

- A community of athletes that can help you make a lifelong change. Being around people with the same goals helps tremendously!
- Not just for elite athletes; all fitness levels
- A class is like a gym class in school ...but one where everyone is encouraging. You will never feel like the kid picked last for kickball.

Schedule the Introduction Session

After you talked to them, if they are a good fit for us (and we are a good fit for them), schedule their free one-on-one Intro session.

Many people will want to talk prices before they schedule. Tell them we have prices that work for everyone in our community from teachers to stockbrokers and everything in between. Asking for pricing now is a lot like asking for 'a car.' We talk about that in the Intro session, and we have ZERO sales pressure.

Also let them know that if we don't think they are a good fit for us, that we will refer them to another local gym.

Zen Planner: Scheduling the Intro Session

Whenever possible, you should add this session into Zen Planner as it will send them a reminder email and it allows us to track the Intro session to see if it turns into a new athlete (prospect to close ratio).

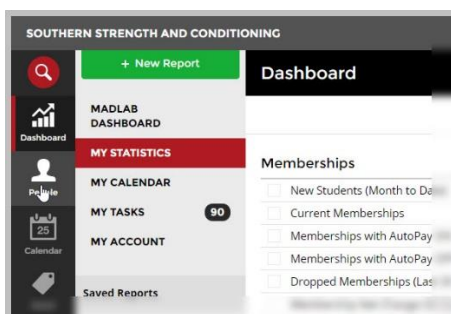
The steps to complete this task are:

- Add a new person to Zen Planner
- Schedule the Intro Session as an appointment

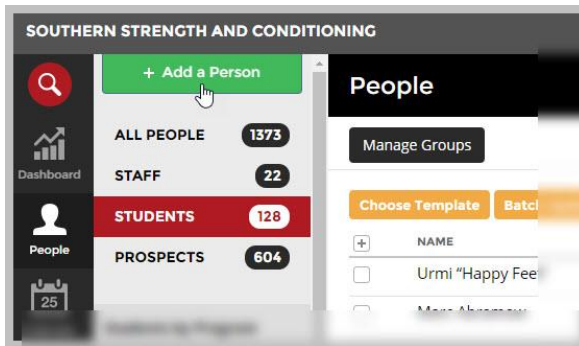
NOTE: Before adding the person to Zen Planner, use the search function to search for the athlete by name. You may find they are already in Zen Planner and it is best not to duplicate the record.

To add a New Person in Zen Planner:

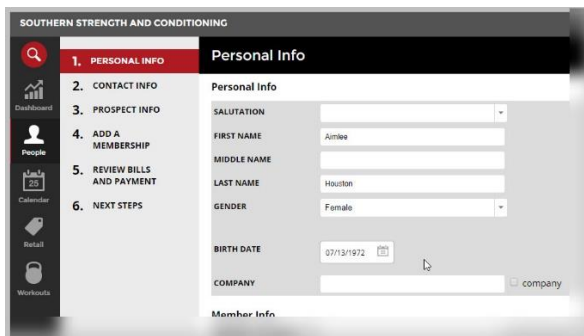
1. Click **People** from the menu options on the left side of the screen.



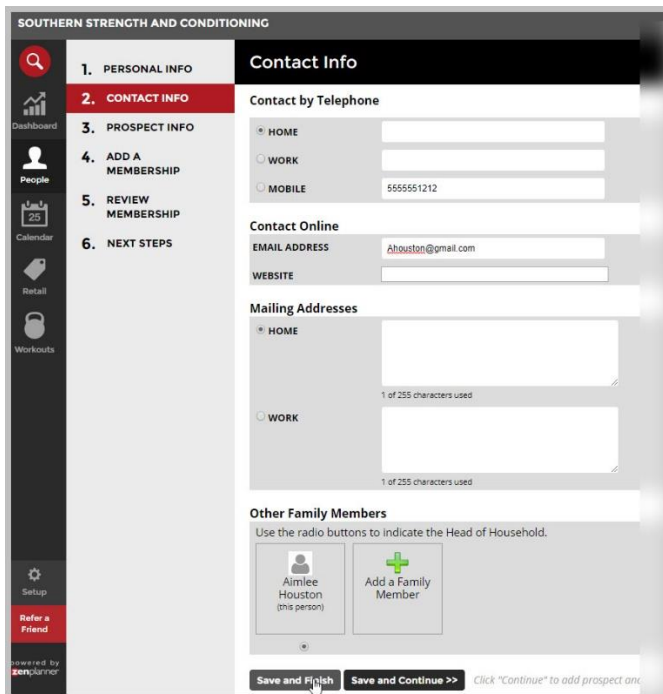
2. Click **Add a Person**.



3. Enter the client's first and last name, gender, and birthdate (if known) and click the **Save and Continue >>** button at the bottom of the screen.



4. Enter the client's mobile phone number and email address. Then click the **Save and Finish** button at the bottom of the screen.

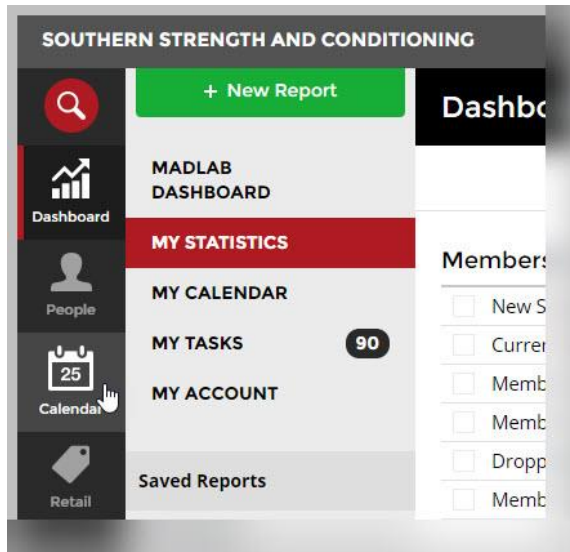


Watch a video of how to add a person into Zen Planner by using the Smartwaiver Plug-in:
<https://www.facebook.com/lara.sturm.7/videos/10213962365245682/>

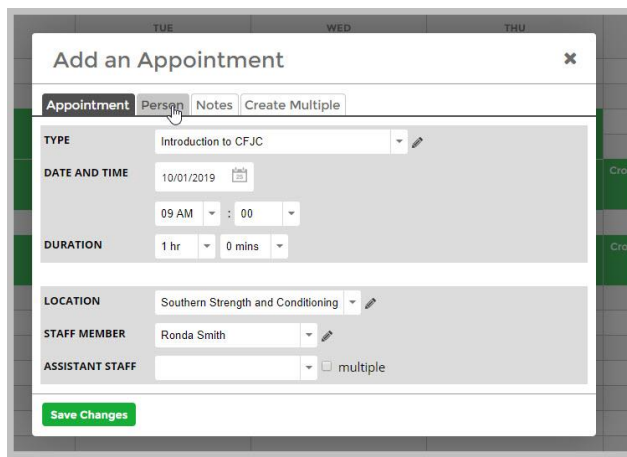
Next, you will need to schedule the Intro session as an appointment.

To schedule the Intro Session as an Appointment:

1. Click **Calendar** from the menu options on the left side of the screen.

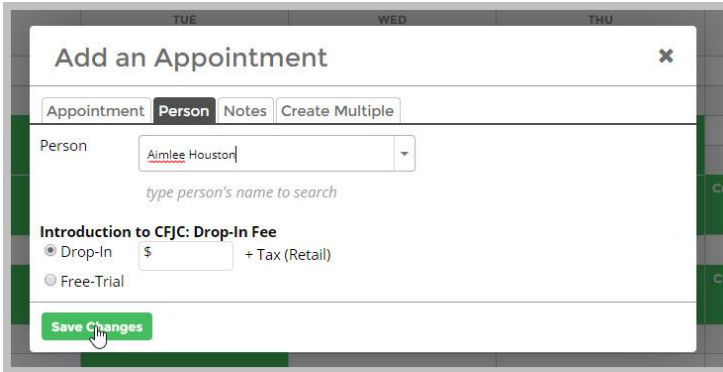


2. Click the appropriate date and time on the calendar. The system displays the Add an Appointment window.
3. From the Add and Appointment window:
 - Select **Introduction to CFJC** in the *Type* drop-down list.
 - Make sure the correct date and time for the appointment is displayed.
 - Select your name from the Staff Member drop-down list.
 - Click the People tab to add the person to the appointment.

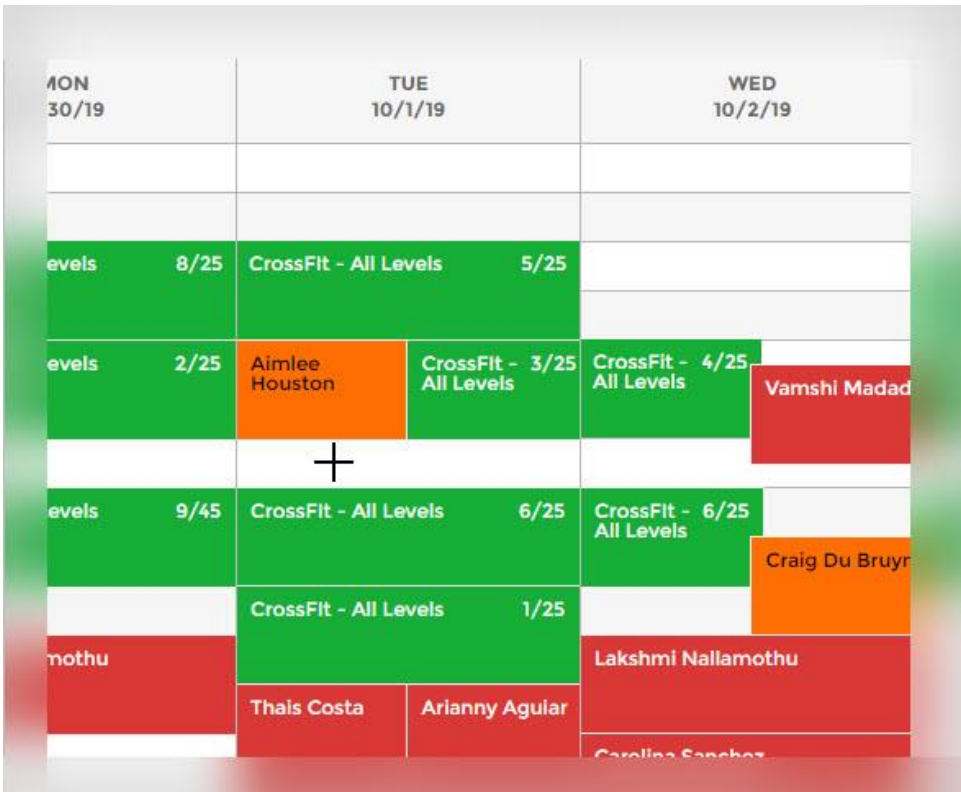


4. In the Person tab, search for the client by typing their name in the **Person** text area. The system shows all matching people in the database in the drop-down list. Click the client's name to select them.

Leave the Drop-in amount blank and click the **Save Changes** button.



The calendar view will show the scheduled appointment. Scheduling a session in the calendar will trigger an automatic email confirming the appointment.



The Intro Class

The Intro class is a discovery meeting when we can find out more about them and determine if we can help them. The focus of this session is discovering the client's pain and how we can help solve it rather than telling them what we do and how much it costs.

Discovering Their WHY

Ask them why they contacted us. What do they want that they don't have now? What have they done in the past that is no longer working?

Uncovering their WHY should be the longest part of the conversation!

Prospect: *I want to try training with you.*

Coach: *Why do you want to make a change?*

Prospect: *I want to lose weight.*

Coach: *...lose weight? (pause)*

Prospect: *I've gained about 25lbs over the last couple of years.*

Coach: *What changed in the last couple of years?*

Prospect: *My job got stressful, and my daughter just turned one. I never really got rid of the baby weight after my first child – she's five - and I just want to feel better.*

Coach: *What have you tried?*

Prospect: *I went on a low carb diet, and I went to Orange Theory. I did great for a while and lost 10 pounds but got out of the habit when my daughter got sick. I went right back to where I was and dropped my membership. I didn't really like it.*

Coach: *What didn't you like about it?*

[Conversation continues for another 10 minutes]

Digging deeper to get prospects to uncover their why is the most helpful thing we can do for prospective clients. It lets them tell their stories, and they will often open up to us with a lot of personal information. Be aware that this often unleashes deep emotions and can sometimes feel like a therapy session.

Example: One prospective member told us a story of how they wanted to join their family for a kayaking trip but was too ashamed at how she looked in a bathing suit. She knew she wouldn't be able to keep up, so she gave an excuse for not being able to go and stayed at home and cried when she saw pictures from the trip posted on social media.

NOTE: We helped Kim lose 65 lbs which dramatically changed her life and how she viewed herself. Two years later, when her family went on a trip that involved horseback riding, she didn't think twice before committing to the trip. She had a great time and sent us a note later, thanking us for helping her be able to go on that trip.

Explain how what we do would help them with their ‘why.’ Give examples. Relate it to a member that we helped and even suggest they talk to that member.

“We help busy professionals like you - parents who want to lose weight and get back into the shape they were in when they were in their 20s. Often, we even get them in even better shape than when they were in their 20s! Your story sounds a lot like our member Kim...”

How We Get People Started

After we know about them, we can outline for them our solution to meet their pain.

‘We can help you lose that weight so that the next time a family trip comes up, you won’t have any hesitation about accepting! First, we need to get you moving.’

Only after we understand their pain can we offer a solution!

“We teach you everything you need to know through a series of one-on-one personal training classes. You learn all the movements and get to practice them before entering a group class setting.

When you know all the movements before you enter a class, you are set up for ongoing success.

Many gyms let people come in and try a class for free by hopping right into classes but that is a bad experience for everyone in the class: the new person feels awkward and bad about slowing down the pace of the class, the coach has their hands full and can’t pay attention to the paying members, and the paying members can get upset that the coach isn’t paying any attention to them!

It’s also a bad idea since we need to know more about you – what you can do, and what you can’t do yet. Throwing people into classes without knowing this first, is a recipe for getting hurt, feeling overwhelmed, and just having an overall bad experience!”

Get the prospect’s buy-in to the idea of learning first, without discussing the cost of it yet. Explain more if needed:

- Athletes need to be able to move well and safely before going into classes.
- With these classes, you get a workbook (textbook) and Inbody measurement.
- We first assess your mobility to see which athletic movements you should be able to perform safely and which movements could cause injury or pain.
- We have a series of about 20 movements. Some of these are high-skill movements you will learn best through a one-on-one setting.
- It’s a foundation for your movement patterns and helps overcome bad habits and/or learn the movements from scratch.
- Athletes also need to learn the structure and flow of a class and a little of the logistics and protocols used in classes.

- Adult learning takes several times to see, hear about, and feel a movement before you should add weight to the barbell.
- When they are ready to go to classes, their first few classes can be scheduled with a coach and treated like a class but with their coach

Introduce the concept of a hybrid membership early. We don't offer gym membership that doesn't include some level of ongoing personal training sessions. Not having a personal coach is a good way to get lost in the shuffle, have no goals and no one responsible for reaching them.