By Kay L. Cross, MEd

Proactive and Purposeful Client Management

Develop systems to track, organize and manage clients and their data.

For those of you reading these columns in order, you may feel overwhelmed at this point, thinking to yourself, "I have so many systems I need to create. How can I possibly get started?" Remember the feeling you had in school of never being "finished"? When you completed one project or paper, there was always another one waiting to be started. Creating systems is the same way. In the ongoing process of developing harmony in your life, there is a continuous ebb and flow. Take a deep breath, tackle one system at a time and realize that synergy is a journey, not a destination.

Accomplishing everything we've covered in Synergistic Systems will take 6–12 months. Work in order through these articles until you have created the synergy to live and work productively, purposely and with great satisfaction.

This month's article is the first of two on client management: the systems you need to track, organize and manage clients and their data. The bottom line is you should always feel a step ahead of your clients' needs. Getting organized in five areas is the way to accomplish that synergy.

New Client Inquiry and Follow-Up. Every one of us started a training business with zero clients. The way you respond to inquiries about your services—and follow up after the initial contact—is critical. Think of this as your "professional image." Below is the system outline I have created and followed the past several years:

- Ask for name, address, e-mail address and phone number (see "Client Management Checklist" on the next page).
- Ask who referred the client (and send a thank-you note to that person).
- Determine goals and needs.
- Describe how your services will meet those needs.
- Offer to send materials via mail or e-mail.
- Discuss equipment the client will need or can purchase.
- Schedule appointment and ask for deposit or agree to follow-up by phone.

Scheduling and Billing. There are myriad opinions as to how to bill and schedule your client appointments. The system I have today works perfectly for me. The key is to create a system, teach your clients how it works and implement it consistently. If you are flaky, your clients will tend to be flaky. Mirror the behavior you want.

- Monthly clients: Book their next appointment before they leave. Send an invoice later. This is for clients who pay for one session at a time at least 4 weeks apart.
- Standing appointments (clients who train the same days and times every week): Request planned absence dates by the 20th of the previous month (e.g., on January 20, they notify you of any absences for February and are billed accordingly). Once my clients have committed to specific dates for training for the following month, they are billed and will not receive refunds. They can reschedule within that month, but no refunds are provided for cancellations, regardless of the notice given.
- Mail or e-mail invoices with a due date of the 1st of the month (e.g., payment for February sessions is due February 1). Mail invoices with at least 10 days' lead time.
- Require that all sessions be paid for in full before services are rendered. If you are selling packages of several sessions, stipulate that these be paid for at or before the first session. Be sure your packages require a certain number of sessions each month and include an expiration date. I sell 1-, 3- and 6-month packages that expire in 30, 90 and 180 days.

Forms and Feedback. Review all the forms you provide to clients. Be sure they are up-to-date, are free of grammatical errors and serve your needs well. I use planning and tracking software by BSDI (you can view their software at www.bsdifitness.com). I can enter all my clients' data, generate reports on assessments and questionnaires, and provide them with colorful charts and educational feedback. Following are the forms I use in my training practice:

- Physical Activity Readiness Questionnaire (PAR-Q)
- medical history questionnaire
- goals sheet
- instructions for first appointment
- physician's release
- scheduling and cancellation policies *(Provide a second copy for the client to keep!)*
- menu of services or price sheet

As far as ongoing feedback from clients goes, I ask *them* to complete a new goal sheet at the beginning of each year. At the beginning of each month, I ask them to record their monthly goals on a calendar that I keep on file to track their weekly cardio and strength training progress. The key here is to require *clients to write their goals*—it gives them ownership and responsibility for their success.

Training Programs. Lately, I have spoken to so many trainers who are working harder, not smarter. Many trainers are spending way too many unpaid hours writing new training programs. If you are going to design a new program for every single session, you need to be charging for that! The problem with constant program changes is that clients never see muscle adaptation to specific exercises. According to periodization research, clients need new programs at least every 6 weeks—but not every session—to continue to see progress. If you want more variety for weekly clients, create a new program each month, allowing yourself to substitute only one or two different exercises per session. I would prefer to use the same program, watching clients increase resistance load and improve technique. This is the program update system I follow:

- Monthly/Bimonthly clients receive a new program every session (4–8 weeks) and are charged extra for my design time.
- Weekly clients follow a new training program each calendar month. I change only four to five exercises from one month to the next. I often create these programs while they are warming up on the treadmill (I've been designing programs for 18 years and could do it in my sleep). I reuse great programs, rotating them through the years.
- If weekly clients want a program to implement occasionally on their own, I create one and charge them for my time (usually 30 minutes).

Assessments. Many clients don't like assessments because they reveal the reality about their current health status. However, for ongoing motivation for them and you, you must assess your clientele regularly. This assessment system has worked well for both me and my clients (see "Assessment Checklist" on the next page):

- Annual: 1-mile walk test, blood pressure, resting heart rate, target heart rate zone, measurements, weight and body fat. This annual appointment is scheduled as assessment-only (i.e., no training program that day).
- Every quarter: weight, measurements, body fat. We start the session with a brief assessment and then continue to the workout.
- I keep an assessment "master" form that quickly shows me which clients have been assessed and which have not.

Some clients like the added motivation of checking body fat every 6 weeks. If so, I schedule accordingly. Choose these dates in advance so clients are mentally and physically prepared.

Evaluating Your Methods. Creating systems for client management is incred-

CLIENT MANAGEMENT CHECKLIST

Client Name	Date					
Return call						
Send information						
Follow-up call						
Thank source						
Free consultation						
Collect deposit						
Schedule appointment						
Send invoice	Jan.	Feb.	Mar.	Apr.	May	June
	July	Aug.	Sept.	Oct.	Nov.	Dec.
Collect fees	Jan.	Feb.	Mar.	Apr.	May	June
	July	Aug.	Sept.	Oct.	Nov.	Dec.
Send client packet						
Review client forms						
Send assessment results						
First appointment follow up						
Review goals						
Review training promise log						
Send encouraging note						
Articles/Handouts						
Birthday card						
Christmas card						
Training anniversary card						
Ask for referrals						
Trainer evaluation						

ASSESSMENT CHECKLIST 2006

Client Name	Date	Age	Ht	Wt	RHR	BP	Bfat	BMI	1-Mile	Target HR Zone

Checklists created by Kay Cross, Cross Coaching and Wellness, (817) 291-9494, www.kaycross.com.

ibly empowering. It also provides clients with expectations of you that generate security and confidence in your abilities as their personal trainer or lifestyle coach. The systems I use work perfectly with my business structure. However, your business is unique to you and may need to be managed differently. The secret is to create systems in each of the five areas and follow them consistently. When clients witness your dedication, organization and consistency firsthand, these serve as a great model for their expectations as your clients. Expect the best, give your best, and experience the best reward: successful and motivated clients.

President of Cross Coaching & Wellness for 18 years, Kay L. Cross, MEd, offers business and life coaching, motivational speaking and personal training. She can be reached at www.kaycross.com.

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