Your indispensable guide to running a profitable fitness business

- Reduce admin
- Slash stress
- Make more money

Why we made this

Starting a fitness business takes guts. Keeping it running demands even more. To be a success in the fitness industry you need qualifications, expertise... and organisation.

Yep, we know. Being organised doesn't sound as sexy as recording videos or being values-driven. But streamlining the systems that keep your business ticking over is one of the most valuable things you can do.

Having a health and fitness business that's properly set up and runs on all cylinders (even when you're not there) is just as important as your knowledge and expertise. After all, if you don't have a business that attracts and retains clients, all your expertise will never see the light of day anyway.

Creating a well organised business frees you up. You'll be a better professional with more time to dedicate to your clients, and you'll have more time for your personal life. You don't want to be replying to messages and sending client welcome packs 24/7, do you?

At Striive, we work hard to provide software services that make the logistical side of things a breeze. We asked ourselves "what are the 10 things every fitness business owner should do in the first 3 months?"

We ended up with 11, so here they are. Everything from onboarding to pricing, automation to agreements. All the business tasks you can't ignore (and how to get them done without losing sleep).

We hope this handbook is useful.

Contents

PART 1

Setting up new clients

The first steps of a new client relationship are crucial. From the moment they book their first session or sign up to a membership, you need to supply information, gather data, and get them set up.

The work you do now will set expectations, manage boundaries, and help everything run smoothly.

Let's talk about onboarding, contracts, and new client admin.

1 Client onboarding essentials

Client onboarding refers to all the processes you use to get a new client set up. It's a vital stage in the client relationship, where you build the relationship, set expectations, and gather information that will set the foundations.

Why is onboarding important?

Clients need to have a positive experience during these early days. Onboarding is your chance to reinforce zero regrets about signing up. Your onboarding communications, documents, and resources should leave them feeling excited, motivated, and part of something special. And that's all before their first session!

From your point of view, an onboarding process makes everything simpler, saves time, and ensures you get all the information you need.

What to include in your client onboarding

1. Client questionnaire

Set up a simple questionnaire that asks all the basic questions you need to get a client setup. History, health, nutrition, training, goals, whatever you need to know. Create a template and set the form up as part of your onboarding automation. Simple!

2. Client agreement

We'll cover this in more detail in the next section. A client agreement is essentially a contract that sets out expectations and boundaries. Include this as part of the onboarding process.

3. Welcome communications

Create a welcome video and/or email sequence that walks the client through everything they need to do before their first session. If you need them to keep a food log, show them what you mean. If you need them to download an app, talk them through it. You only need to record the videos and write the emails once.

4. Client pack

Bundle up everything your client needs in an attractive, branded pack to welcome them to the team. Forms, contact information, FAQs, and any training or nutrition guides plus fun extras like branded merch. They'll love it.

How often should you change your onboarding process?

The beauty of automating your onboarding is that you can do it once and keep rolling it out. But you should review it regularly (as with all your business processes) to check that it's doing the job.

Ask clients if they found it easy to read, understand, and follow. Review your stats to see where any bottlenecks exist (open rates, downloads, responses). Keep up to date with software that could make onboarding smoother.

2 Writing a solid client agreement

A client agreement is a formal document that sets out the details of the trainer/client relationship. It avoids misunderstandings and miscommunication and keeps things running smoothly.

Why do you need a client agreement?

Selling a service comes with certain challenges. Most people won't know exactly what to expect (and there's no industry standard). A client agreement benefits you and the client. They'll understand what to do if they need to cancel, ask for a refund, or make any changes. You will be confident the client has agreed to the details that protect your time and income.

12 things you could include

1. The nature of the relationship

Be clear about what they can expect and what you will help them achieve.

2. Definition of services

What do you deliver, and what do you not do? Where are the boundaries of your service?

3. Commitment of effort

What level of commitment do you expect? How will you measure this and what will happen if they don't show this commitment?

4. Equipment

Where will you deliver your services and what equipment will you provide? Will they need to bring any equipment?

5. PAR-Q requirement

What steps need to be completed before coaching starts? This will likely include PAR-Q but could include other things.

6. What happens next?

Do you need clients to do anything? For example, body composition tests, food diary, or supplying medical information.

7. Fee structure

What is your charging policy and how often do you review it? Make clients aware of how to purchase extra time or bolt on services.

8. Payment policy

How should clients pay, and how far in advance do you need payment? What happens if it's not received by this time?

9. Refund policy

Can clients ask for a refund? If so, what time period and what does the process look like?

10. Lateness policy

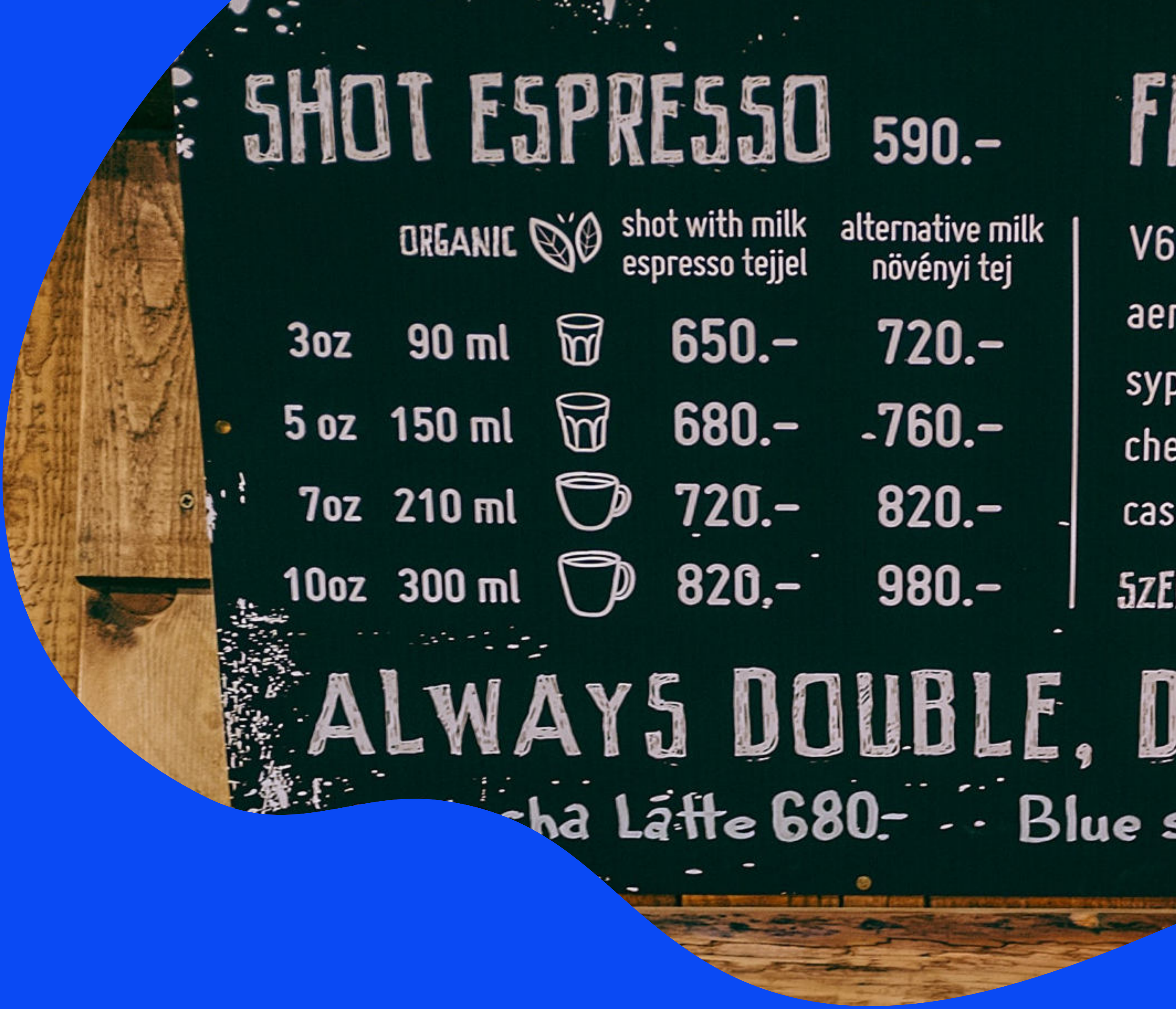
What happens if a client is late to a session or call? How and when should they let you know? Include any policy for emergencies.

11. Cancellation policy

Set out a policy for cancellations by the client, and a separate one for cancellations by you. How much notice, and what happens next?

12. Insurances

Include injury liability waiver and give details of any relevant insurances for accident or injury.



PART 2

Pricing and finances

How much you charge and how you manage your money will dictate what you earn as a self-employed fitness professional. Big things to think about! And it’s much easier to get these things right from the start than try to radically alter them once you’re established.

This section will help you set your prices, organise your finances, and think about finding a niche.

3 Structuring packages and pricing

Pricing is a decision that will impact your income for years. It can be hard to know what to charge, so think about your location, the demographic you're selling to, the value they place on your service, and your expertise.

Things to consider

- It's difficult to drastically increase your prices, so start with no regrets!
- Comfortable income allows you to live life on your terms with minimal stress.
- Charging enough gives you the freedom to be choosy about who you work with.
- You need to charge enough so you can invest back into your business.
- Charging what you're worth boosts confidence and contributes to your reputation.

Pricing for class clients

Think about the pros and cons of offering separate packages for different classes, vs bundles of class options. Find a balance between offering combinations that will sell, without overloading yourself with options.

Conduct client research to understand how many classes people want and then work out how to price these packages vs single PAYG classes.

Be sure to think about the details of class packages – how quickly do they need to use the passes, will you offer any benefits for subsequent package purchases?

If you teach a niche class like hot yoga or bootcamp, consider the option of selling intro packages and gift voucher packages to increase the entry points for brand new clients.

Pricing tips for PAYG

PAYG or drop-ins can be challenging. You need to charge enough to make it worthwhile, and provide value so people keep coming back (and recommend you).

Aim to upsell PAYG clients to blocks of classes or to a package that includes other services. This will protect your income, reduce admin, and make the cost-per-session better for you.

Help clients see that buying a block of sessions will lead to them getting better results (because they'll be training more consistently).

Pricing for PT packages

Selling private packages is a great way to make more money with less admin per client. Clients on packages get to know you better, which can lead to increased loyalty and better retention.

Reward their commitment with added value. This could be increased level of service, extra access to you if hybrid or online, merch, eBooks, recipes books or discount codes.

4 Organising your business finances

Don't neglect finances. We know, it's probably the least fun and most unappealing part of running a business. But you can't bury your head in the sand about money.

Putting off your financial admin, accounts, and expenses is bigger than having stress hanging over you. You might actually be losing income due to lack of boundaries around late payments or incorrect tax guidance.

Streamlining your financial admin gives an accurate picture of your profit and loss, and means no nasty surprises with the tax bill. Here are 8 pretty easy ways to set yourself up for success right now.

Eight steps to financial mastery

1. Encourage payment up front

Make it easy for clients to pay before their session or class (and add this information to your client agreement document).

2. Sell packages, not PAYG

Shifting clients onto packages will boost your income and save time, energy, and stress.

3. Keep up-to-date records

Finances are much easier when you keep on top of them with timely records of income, payments, and expenses.

4. Automate as much as possible

There's really no excuse for a clunky system or tons of paper. Make sure your payment system reconciles automatically, too.

5. Give clients the ability to pay immediately

Set up a way for clients to pay the moment they book. This streamlines the process and removes any friction in the purchasing decision.

6. Don’t do favours

You’re a professional, so charge like one. That means no freebies, no mates’ rates, no “pay me back when you can” situations.

7. Switch banks

Look for a bank with an app that integrates with your payment system and accounting software. And get separate business and personal accounts.

8. No end-of-year stress

Don't leave your accounts or tax return til the cut-off. Diarise time every week or month for financial admin, and have regular catch ups with your accountant if you use one. It will make the annual paperwork much easier.

ON THE STRIIVE BLOG

9 steps to organising your finances

A few simple steps can free up stress and save you a lot of time.

Read now

TIP

Use Striive to sell your packages, process online payments, debt control, record your expenses, and much more.

Try Striive for free

5 Niching your business your way

Knowing your niche means you can get really clear in your marketing messages and attract clients who you enjoy working with. They're more likely to work hard, get results, and recommend you to more people like them. You'll save money on marketing and advertising (because you'll never be vague about what you do and who you do it for). And you'll build a reputation as a go-to expert.

Trainers and coaches who niche their services can usually charge more because they are perceived as experts rather than generalists. Expertise, experience, and specific qualifications mean you'll be sought after and can charge accordingly.

Five ways to choose a niche

- Solve a problem you’re passionate about or that forms part of your own backstory
- Niche down by demographic (post-natal, endurance athletes, CEOs who travel)
- Create a niche offer rather than targeting a niche target audience
- Be realistic about your location, environment, and relevant training
- Consider under-represented groups or gaps in the market

Niche means specific

Once you've chosen a niche, it's important to be crystal clear about what it is. Can you describe your niche in one sentence? Make sure you understand exactly what problems you solve for this niche, and how your services help.

Immerse yourself in the world of your niche so you can connect and use the right language in your marketing.

Can you change your niche?

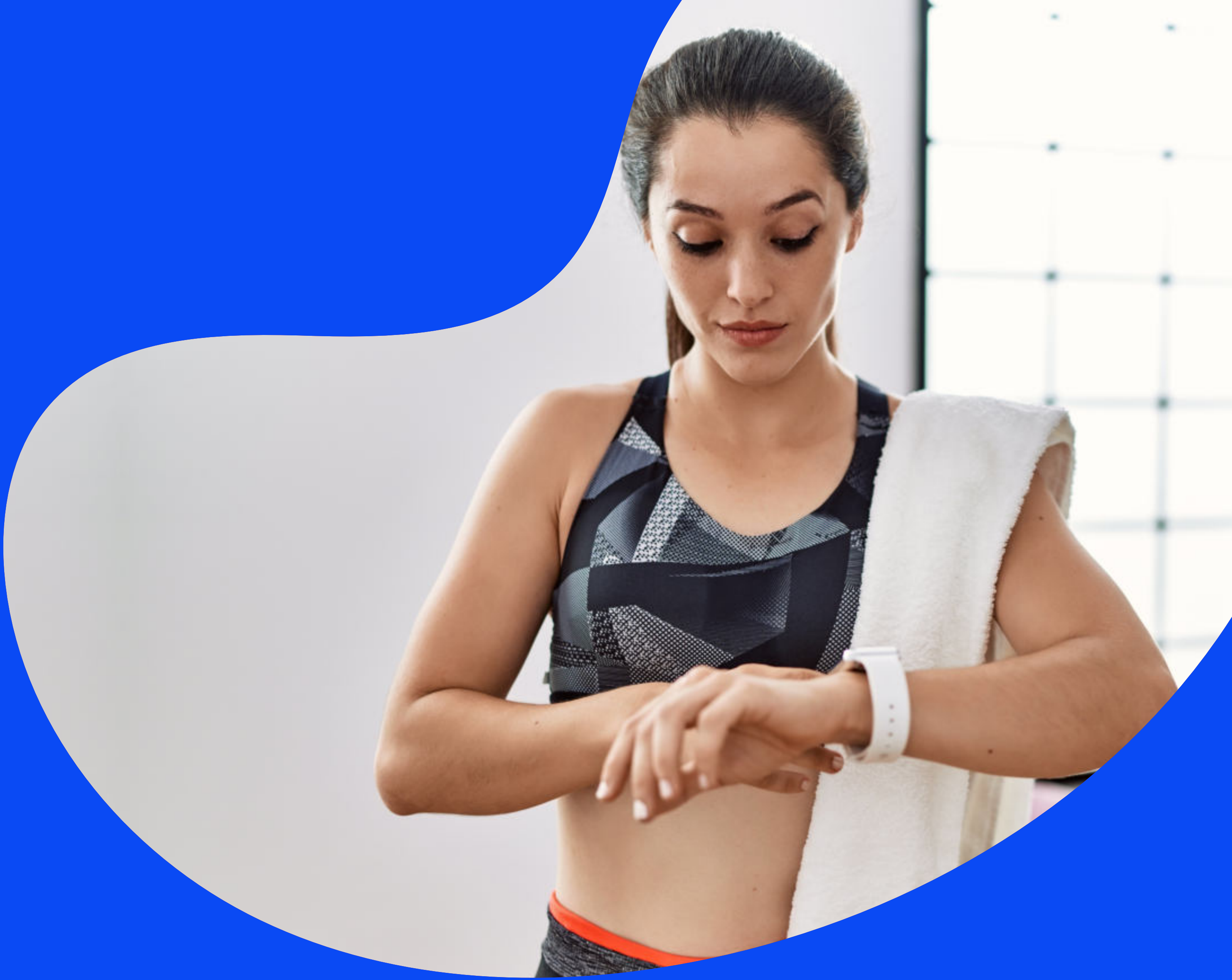
You'll probably want to change your niche at least once during your career. It's sensible to stay flexible so your business can adapt with changing times, trends, and consumer attitudes.

ON THE STRIIVE BLOG

Choose a training niche for success

You want long term clients who value your services and will make a success of training with you.

Read now



PART 3

Getting efficient

The secret to a low-stress, high-profit business is efficiency. Systems, processes, and automation help you run a streamlined business that ticks along whilst you spend your energy on big decisions that will push your business forward.

Let's talk about how to maximise your time, automate regular tasks, and encourage clients to self-manage. All without losing the personal touch!

6 Streamlining your work time

Your time is a valuable commodity, so how can you strike a balance between making the best use of every moment without burning out?

Like all habits, these routines get embedded early. Start as you mean to go on with efficient, strategic use of your work time.

1. Identify wasted time

Audit a typical work day to identify periods of time where not much gets done (social media scrolling, we're looking at you!) Wasting time like this is inefficient and makes you feel more stressed than you need to be. You probably do "have enough time in the day", you're just not using it wisely.

Try time tracking for a week. Include time spent with clients, programming and check ins, content creation, planning or admin, travel, and life admin, plus "other". This last category will reveal the things you do often that are eating up your time.

2. Schedule tasks

Break your work diary down into chunks of time for key tasks. Not only will this ensure they actually get done, but by bundling similar tasks together you'll get more done.

Rather than replying to emails as they come in, set aside an hour a day. Instead of writing content every morning, do it all in one or two chunks per week.

3. Turn off notifications

Our phones are designed to grab our attention with their flashes and beeps. But they interrupt your flow and can make a simple task take twice as long.

Turn off all but the most vital notifications and you'll win back a surprising amount of time. Stay in control of your phone, rather than letting it control you.

4. Learn to say no

Develop boundaries around your time, by only saying yes to things you want to do and have time for. You don't have to help everyone every time they ask.

5. Automate tasks and resources

If you do something more than once a week, automate it. For you, that might mean welcome emails, onboarding packs, or sending common FAQ-style replies.

Make use of software automation, email templates, PDFs, videos and other resources that you can keep in a client hub and use regularly.

7 Encouraging clients to self-manage

Whilst we're on the topic of time-management, can you imagine how much easier life would be if you didn't have to remind clients to do so many things? We're not suggesting you develop a completely hands-off approach (that sense of connection will always be important to the coach/client relationship). But if you can encourage clients to automatically do the little things themselves, your working life will run more smoothly.

Get clients into a routine

Most people thrive on routine. Make it easy for your clients to have a routine with you, it will reduce their stress and make PT an easier part of their life.

Encourage clients to train with you at the same time every week. This will help you manage your diary, finances, and business admin and can be the basis of a healthy lifestyle routine for them. Try to get them to commit to their slot for 4 weeks ahead (or buy a package!)

Six ways clients can self-manage

1. Buying packages

Create packages and make it very easy for clients to purchase one without needing to consult you. This means making them clearly visible on your socials, website, or via the gym.

2. Booking classes

It should be very easy for clients to book onto classes with you. Make sure your availability or timetable is clear and bookings are easy to do.

3. Request sessions

Clients might want to request extra sessions when they have free time. Set up a way for them to book this without needing to call or message you to ask manually.

4. See their data

Lots of clients will want to view their completed sessions, upcoming bookings, or progress data. Make it easy for them to access this information without involving you.

5. Cancellations

If a client needs to cancel, they should be able to do this without calling you and talking it over. How can you use software to make this a hands-off process?

6. Manage their personal details

If clients need to update their personal details or manage their membership, create a way for them to do this online without your input.

TIP

With Striive, all of these jobs are done for you - either by us or your clients via your portal.

Not only does it save you precious time, it avoids those awkward conversations too!

8 How to automate payments

Automation is a no-brainer business tool which will save you an immense amount of time. You can – and should – automate any task that you do regularly from onboarding to check ins and even exit interviews.

One of the obvious areas for automation is payments. You don't want to start from scratch every time a client books and pays. This is such a frequently repeated business task that you must automate it. And today's software makes it really easy.

Automating anything to do with payments, payment requests, refunds, and missed payments not only streamlines your systems, but avoids those awkward money chats with clients.

Aim for automation

It might not be possible to have every step of your client journey automated just now, but it's a good goal to aim for. Automation does not mean you'll lose the personal touch. You can still manually send voice notes, do check ins, and of course deliver sessions. But if you automate all the repeated tasks, you will save so much time you can then use to grow your business.

Banking reconciliation

Financial admin doesn't have to take ages. Get a business account with a modern bank, choose bookkeeping or accountancy software with payment processes that all link up. No more manual reconciliations and expenses.

Automatic billing and payments

Make sure your systems automate repeat billings for memberships and packages. And if a payment fails, set up an automatic email or text and subsequent repeat payment requests.

TIP

Every Striive account includes our online payment solution (Striive Payments).

Let us handle all your payments and make checking the bank a thing of the past!

PART 4

Dealing with trouble

Every business owner and entrepreneur knows to anticipate ups and downs in business. Things won't always be plain sailing, but challenges should never stop you in your tracks. With some forward planning and robust boundaries, you can come through difficult times with a stronger business.

Let's dive into tricky topics like letting clients go and navigating an economic downturn.

9 What to do about difficult clients

Running a fitness business is challenging enough without the stress of tricky clients. No-shows, late cancellations, and out-of-hours messaging will soon become a drain on your time. It's worth getting clear with clients right from the start. Here are five problems that can be solved with a system.

No-shows

When clients don't show up, you lose money and waste time. Make sure you have a cancellation policy in place, clearly communicated on your website, during consults, and in your onboarding process. And automate reminders of upcoming sessions.

Low engagement

Patchy client commitment impacts their results and could reflect poorly on your reputation. Tap into human behaviour by setting clients a meaningful goal, and celebrating small wins so clients feel connected to you and your business.

Poor results

You know that if a client follows your plan, they'll make progress. So make sure they're confident with your tracking software, understand how to complete check ins, and are confident about being honest.

Communication boundaries

We've all had that one client who texts (when you use Voxer) or leaves WhatsApp voice notes on a Sunday night. It's great that they're comfortable with you, but this doesn't mean 24/7 communication. Get clear in your client agreements about the platforms you use, hours you're available, ad response times.

Rescheduling sessions

If rescheduling becomes a regular thing, you've got a problem on your hands. Constantly needing to revisit your work diary is a drain on your energy. Get clients into routine from the start, and aim to get them booked in for a few weeks ahead. And be clear about your cancellation and rescheduling policies.

Four ways to deal with difficult clients

Communicate

Clear policies around bookings, cancellations, rescheduling, and getting in touch.

Routine

Encourage every client into a regular routine, with sessions on the same days and times.

Consequences

Have Ts & Cs including cancellation policy and penalties for no-shows.

Remind

Automate a reminders system for sessions, calls, and check ins.

ON THE STRIIVE BLOG

How to deal with unreliable clients (and save your sanity)

If you're dealing with people then you'll inevitably end up dealing with their 'quirks'.

Read now

10 Letting a bad client go

How much time do you spend thinking about the clients you don't want to work with? 'Bad clients' are an uncomfortable topic, but we can't ignore the elephant in the room.

Once you are working with a client, it becomes pretty obvious when they're not a good fit. Do they respect your time? Do they stick to your agreed arrangements about check ins, payments, cancellations? Do you enjoy coaching them, or does every interaction leave you feeling drained?

What to think about before you have the conversation

- Have I previously communicated with them about the issues?
- How many times has this client been a problem?
- Is it definitely them (they're not catching me on a bad day?)
- Are they definitely aware of payment or Ts & Cs?
- How, when, and where will I have the conversation with them?
- What can I learn – do I need to change my messaging, onboarding, or delivery?

Creating an off-boarding strategy

Prepare what you are going to say: why do you feel you are no longer a good fit?

Choose a suitable time and place to have a face-to-face conversation (private, calm) or set up a call for online clients.

Explain your reasons, and give them the opportunity to respond or ask questions.

Offer to put them in touch with other trainers or coaches you think will be more suited to their requirements.

Finish the conversation by reflecting on high points of the coaching relationship, and thank them for their custom.

Send them any outstanding paperwork like reviews, programmes or assessments.

Consider giving them a relevant small goodbye gift - the aim is to leave on a good note with no hard feelings.

ON THE STRIIVE BLOG

How (and why) you should let a bad client go

When you need to get rid of a client, here's how to do it professionally.

Read now

11 Cost of living considerations

The current economic situation is tough for small businesses and sole traders. A few smart steps now will help you come out the other side with a smarter, stronger business.

Just like you'd advise a fat loss client to create a deficit from fewer calories in or more calories out, you can boost your finances with more money in or less money out. Here are a few ways to do it.

Review your running costs

Set aside time to look at your outgoings – not just big things like rent, but journals, memberships, and subscriptions to software. Scrap any you no longer need, and consolidate as many as you can.

Chat to your accountant

Accountants aren't just there to remind you about your twice-yearly tax bill. Get in touch with yours and ask for a review of your accounts, tax deductible allowances and anything else that might save money.

Ramp up client comms

It's easier and cheaper to retain a client than find a new one. Now is the time to increase your efforts at client relationship management. Send voice notes, remember key dates like birthdays, and go the extra mile to make the customer journey memorable.

Create useful freebies

What small, high-value things can you create for clients? Ideas include very short videos which you can use as responses to FAQs, or PDF downloads covering popular topics.

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What small, high-value things can you create for clients? Ideas include very short videos which you can use as responses to FAQs, or PDF downloads covering popular topics.

Have a referral strategy

This could be as simple as letting all clients know that they will get £10 off their monthly membership when they refer someone who signs up.

Get serious about social proof

Ask all existing clients (and any recent ones) for a written or video testimonial. Turn this into social proof for social media and get more than one post out of every testimonial.

Rethink your services

Listen to what clients are telling you. If 1-2-1 is too much for people's budget, consider offering small group. If your 12-week online course is getting no sign ups, ask people what they want – then deliver it. It's never been easier to pivot and launch different offers.

ON THE STRIIVE BLOG

10 ways to strengthen your fitness business during the cost of living crisis

Costs are soaring and clients are feeling the pinch. Cut costs and boost service levels to withstand tough economic times.

Read now

We hope this practical handbook has given you some reassuring advice about the real-life challenges of running a fitness business.

You should now have a better idea of how to onboard new clients and write a client agreement. And we've given you food for thought about pricing your services and organising your finances.

Systems, processes, and automation are every business owner's best friend, so don't forget to activate your free all-access trial of Striive which is packed with business tools for fitness experts.