PERSONAL TRAINING CLIENT TRACKING POLICIES AND PROCEDURES

Purpose: These policies and procedures are used to keep a consistent protocol with the Personal Training position to accurately document client attendance and package usage.

Scope: These policies and procedures are used by Fitness & Wellness Personal Trainers.

Policies:

I) PERSONAL TRAINING CLIENT TRACKING POLICIES

a) All client sessions must be documented in both Fusion and the Personal Training tracking Microsoft Excel spreadsheet.
   i) In the event Fusion malfunctions, the Microsoft Excel spreadsheet is used as a back-up verification of sessions used.
   ii) The trainer must record all of their sessions under their client list and under the pay period document no later than 9am on the first Wednesday of the pay period. (Edits should be made promptly to ensure accurate reporting and approvals).
b) Personal Trainers must keep verification of each package the client has used up.
c) Personal Trainers also use the Microsoft Excel spreadsheet to indicate when they are available to take new clients (highlight their name green) and when they are not available to take new clients (red).
   i) It is the responsibility of the trainer to promptly change their status when they are no longer able to accept more clients.
   ii) Personal Trainers must indicate their availability in the Microsoft Excel spreadsheet.
d) Personal Trainers are not permitted to offer “free” sessions unless approved by the professional staff.

Procedures:

I) PERSONAL TRAINING CLIENT TRACKING PROCEDURE

a) Access the Personal Training tracking Microsoft Excel spreadsheet. Each trainer will be given access to this upon completing all training requirements.

b) The trainer will type their name in a cell on the spreadsheet and highlight their name GREEN to indicate they are able to train clients. If the trainer cannot take on clients at the time, they should highlight their name in RED.

c) Underneath the trainer’s name, they will list any active clients. Based on the number of sessions purchased, the trainers will document the number of sessions allotted for the client by creating a column for each purchased session and highlighting the cell YELLOW that signifies the last purchased session.

d) Once the client completes a session, the trainer will type the date of the completed session in the cell to the right of the client’s name until they reach the YELLOW highlighted cell. Once this cell has been filled with a completed session, the trainer should notify the client that they must purchase additional sessions to continue training.

   i) It is the responsibility of the Personal Trainer to notify the client when their purchased package has ended, and to encourage them to purchase another package. All sessions should also be cross-checked and updated in Fusion. Personal Trainers are responsible for keeping up with expired sessions and notifying clients of used packages or expired sessions.

ii) The Personal Trainer should notify the Personal Training Program Assistant when a package of sessions has been finalized with a client to ensure a follow-up satisfaction survey can be sent.