

NEW CLIENT FORMS & ASSESSMENT

For Personal Trainers

Created by:



INTRODUCTION

Welcome to the Axiom Fitness Academy new client packet. This resource packet is meant to take a little stress off of you as you start to bring in new clients by giving you forms and documents to use with a new client so you don't need to go create them.

HOW TO USE THIS PACKET

This packet is best used during an initial consultation meeting with a client. You are trying to accomplish a lot in this first meeting so we suggest blocking off 60-90 minutes with them so as not to rush the process.

In this initial session we really have 3 main priorities:

- Establish rapport through asking the right questions and getting to know this potential client on a deeper level.
- See them do enough to know where to start with them and be able to discuss an initial plan.
- Get them to say yes to come back!

The handouts in the following pages were created to support each of these steps. This was designed for you to be able to take and use, but don't feel like you can't use it as inspiration and add more of the questions you'd like to ask.

*Please keep in mind that you might not need all the resources in this packet.

****SECRET WEAPON****

EXTENDING THE RAPPORT TIMELINE:

If at all possible we suggest connecting with intro/strategy session clients prior to your first 60-90 minutes together. This allows for you to break the ice, let them know what to expect, and do a little discovery that will allow you to better prepare for the big day.

These can be done via coffee date, phone call, video call, or at a minimum sent via a google form like this one ahead of time for them to fill out. We suggest 15-30 minutes for this intro conversation and ask questions such as:

GREAT QUESTIONS TO ASK:

- ***What do you want to achieve?*** *If you were to close your eyes and visualize what success looks like 6-8 months from now what would be different?*
- *Why is this important to you? Why right now?*
- *What's holding you back from doing it on your own?*
- *What do you expect from or need from a trainer for this to work?*
- *What's your ideal training schedule?*

*****If unable to have this conversation prior to then these very well may be the first questions you ask when you sit down together in person.***

CLIENT INTAKE FORM

Tell me more about yourself!

By learning a little bit more about your lifestyle and your habits, I can take better care of you and help to craft the right approach for you.

Name:

Date of birth:

Email:

Phone #:

Health History

Circle any of the following that apply:

Heart disease

High Cholesterol

Hernia

Arthritis

Low Blood Sugar

Cancer

Diabetes

High Blood Pressure

Lung disease

Heart attack

Disordered eating

Other conditions not listed:

Please list any medications/supplements you are taking.

Any orthopedic injuries/surgeries?

What are we looking to accomplish? [Goals]

INTAKE CONT.

When was the last time you felt and looked your best? What was different then versus now?

Have to worked with a trainer before? How was that?

Any exercises that you love or hate? Tell me more about your gym experience.

How much time per week can you devote to training?

What do you think will be the biggest obstacle you will face in reaching these goals?

On a scale from 1-10 how motivated are you to achieve your goals?

1-----2-----3-----4-----5-----6-----7-----8-----9-----10

What would it take to get you to a 10?

SECONDARY INTAKE (OPTIONAL)

Right now, how would you rank your overall nutrition habits?

HORRIBLE 1-----2-----3-----4-----5-----6-----7-----8-----9-----10 **AWESOME**

Why?

Are you regularly active in sports and/or exercise?

If so, approximately how many hours per week? _____

How many hours a week do you do other physical activity? (i.e. housework, walking, yard work, etc.) _____

What other types of movement/activity do you really enjoy doing?

Anything else I know before we get out and move around a little bit?

MOVEMENT CATEGORIES

Take them through a very light/appropriate warm-up with a focus on loosening up the hips, t-spine, shoulders.

CORE:

Front Plank [notes]

**30-60 sec?*

Side Plank [notes]

**30+ sec?*

SQUAT:

BW Squat [notes]

Goblet Squat [notes]

HINGE:

Glute Bridge [notes]

Hinge/KB RDL [notes]

MOVEMENT CATEGORIES

LUNGE:

BW Lunge [notes]

Step-down [notes]

PUSH:

Pushup [notes]

DB Chest Press [notes]

PULL:

TRX Rows [notes]

Cable (or) DB Row [notes]

NOTES + EXERCISES

RED LIGHT EXERCISES:

YELLOW LIGHT EXERCISES:

GREEN LIGHT EXERCISES:

Any additional notes: