

Title	Develop marketing and business tools and procedures to support business practices as an exercise professional		
Level	4	Credits	8

Purpose	People credited with this standard are able to: demonstrate knowledge of establishing a business as an exercise professional; develop business tools and strategies for an exercise professional; and, develop communication and marketing strategies for an exercise professional.
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Classification	Exercise > Exercise Industry Practice
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Available grade	Achieved
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Guidance Information

- 1 All learning and assessment within this unit standard must be carried out in accordance with the following, as relevant to their role:
 - relevant legislation including Health and Safety at Work Act 2015, Privacy Act 1993, Consumer Guarantees Act 1993, Accident Compensation Act 2001, Fair Trading Act 1986, and any subsequent amendments;
 - guidelines and codes of practice applicable to this standard include the Code of Ethical Practice endorsed by Exercise New Zealand;
 - organisational policies and procedures including Emergency Action Plans (EAPs) and Standard Operating Procedures (SOPs).
- 2 This unit standard is designed for a business which will generally consist of a self-employed exercise professional, often with no further employees.

Outcomes and performance criteria

Outcome 1

Demonstrate knowledge of establishing a business as an exercise professional.

Performance criteria

- 1.1 Establish and analyse the demand for a target market as an exercise professional.
- 1.2 Complete a market analysis to identify competition and potential professionals/businesses for collaboration.

- 1.3 Identify the advantages and disadvantages of setting up a personal training business within a member-based exercise facility, non-member based facility and as a mobile service.
- 1.4 Identify the advantages and disadvantages of different employment arrangements.
- Range may include but is not limited to – contracted, employed.
- 1.5 Identify the personality traits, knowledge, and skills required by exercise professionals and how these can contribute to business success.
- 1.6 Complete a self-analysis and select strategies to address identified strengths and weaknesses.
- 1.7 Identify legislative requirements that apply to exercise professionals.
- Range Health and Safety Act, Consumers Guarantee Act, Privacy Act, Fair Trading Act.

Outcome 2

Develop business tools and strategies for an exercise professional.

Performance criteria

- 2.1 Document exercise business goals and expectations.
- 2.2 Create a work plan for a working week.
- Range may include but is not limited to – client bookings, administration, own training, time off, marketing.
- 2.3 Forecast expenses, taxes and hours of work to create a budget.
- 2.4 Develop a pricing strategy and/or list taking into account the budget.
- 2.5 Develop a database to store exercise client information and track data.
- Range client contact details, leads for marketing, finances, attendance.
- 2.6 Develop a procedure for tracking exercise client finances.
- Range billing, banking, record keeping requirements.
- 2.7 Develop a cancellation policy.
- 2.8 Develop a long-term pricing strategy.

Outcome 3

Develop communication and marketing strategies for an exercise professional.

Performance criteria

- 3.1 Develop a procedure for communication with, and recording of, exercise client contact(s).
- Range initial contact, first visit, follow up.
- 3.2 Develop a marketing strategy to attract new clients and handle client objections.
- 3.3 Develop a strategy for long-term follow-up of exercise clients.
- Range past clients, unconverted leads.
- 3.4 Describe different ways of marketing and the importance of marketing to business success.
- Range online, social media, print.
- 3.5 Create online or social media marketing to target exercise clients.
- Range new clients, past clients, unconverted leads, current clients.

Planned review date	31 December 2022
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Status information and last date for assessment for superseded versions

Process	Version	Date	Last Date for Assessment
Registration	1	23 November 2017	N/A

Consent and Moderation Requirements (CMR) reference	0099
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This CMR can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.

Comments on this unit standard

Please contact Skills Active Aotearoa Limited info@skillsactive.org.nz if you wish to suggest changes to the content of this unit standard.