

40539

Apply tools and techniques to support client acquisition and business operations for an exercise professional

Kaupae Level	4
Whiwhinga Credit	10
Whāinga Purpose	<p>This skill standard is for people who want to apply marketing and sales processes and techniques for client acquisition and to develop business tools and strategies to support business operations for an exercise professional.</p> <p>It is intended for people considering a career in the exercise industry.</p> <p>This skill standard has been developed to align with the New Zealand Certificate in Exercise, Level 4 [Ref: 3563].</p>

Hua o te ako me Paearu aromatawai | Learning outcomes and assessment criteria

Hua o te ako Learning outcomes	Paearu aromatawai Assessment criteria
1. Apply marketing and sales processes and techniques for client acquisition for an exercise professional.	a. Create a personal value proposition as an exercise coach.
	b. Establish a target market for exercise services.
	c. Create a marketing schedule to build brand awareness and generate leads.
	d. Produce brand building and lead generation content in line with marketing schedule.
	e. Create a sales process aimed at converting leads to clients.
	f. Carry out a sales consultation with a potential client.
2. Develop business tools and strategies to support client and business operations for an exercise professional.	a. Explain business planning tools and strategies used by an exercise professional.
	b. Create client facing documentation requirements to support an exercise business.

Pārongo aromatawai me te taumata paearu | Assessment information and grade criteria**Assessment specifications:**

Assessment must take place in a realistic exercise coaching environment.

For assessment criterion 1f – consultation with a potential client can be via role play or contact with a genuine client.

Ngā momo whiwhinga | Grades available

Achieved

Ihirangi waitohu | Indicative content

Marketing and sales for client acquisition for an exercise professional:

- Value proposition of exercise coaching.
- Target markets for an exercise professional (how to pick, broad to niche, how to message to your market).
- Marketing your exercise brand and services (online, in an exercise facility, and face-to-face).
- Marketing schedule for an exercise business.
- Lead generation activities – multiple avenues.
- Using technology to share your exercise expertise.
- Sales process for an exercise professional: initial contact, meet and greet, needs analysis, taster personal trainer experience, promotion of exercise services, ask questions (conversation) leading to a training package.
- Communication and building relationships: build rapport, gather information (complete questions), discuss budget, make recommendations, handle objections, close sale, onboarding/welcome package for new exercise clients.

Business tools and strategies for an exercise professional:

- Business planning tools and strategies: pricing, budgeting, break-even targets, tax, employment arrangements, raising prices, tax and finance obligations, lead generation and conversion targets, professional planning, insurance, plan for work week.
- Client facing exercise documentation requirements: screening form, welcome letter, price list, terms and conditions, fees and payment, cancellation/no show policy, programming templates.
- Technology for an exercise business: database for clients and leads, applications for programming, tax agent, accounting, bookings, video recording and editing, graphic design.

Rauemi | Resources

All learning and assessment within this skill standard must be carried out in accordance with the following:

- Legislation including [Health and Safety at Work Act 2015](#), [Privacy Act 2020](#), [Consumer Guarantees Act 1993](#) and [Accident Compensation Act 2001](#).
- Guidelines and codes of practice include the NZ Register of Exercise Professionals (REPs) Code of Ethical Practice, REPs Pre-Screening form and guide (or industry approved equivalent). These are available from the REPs website <http://www.reps.org.nz>.
- Organisational policies and procedures including Emergency Action Plans (EAPs) and Standard Operating Procedures (SOPs).

Pārongo Whakaū Kouna | Quality assurance information

Ngā rōpū whakatau-paerewa Standard Setting Body	Toi Mai Workforce Development Council
Whakaritenga Rārangi Paetae Aromatawai DASS classification	Community and Social Services > Exercise > Fitness Assessment and Exercise Instruction
Ko te tohutoro ki ngā Whakaritenga i te Whakamanatanga me te Whakaōritenga CMR	0099

Hātepe Process	Putanga Version	Rā whakaputa Review Date	Rā whakamutunga mō te aromatawai Last date for assessment
Rēhitatanga Registration	1	27 March 2025	N/A
Kōrero whakakapinga Replacement information	N/A		
Rā arotake Planned review date	31 December 2029		

Please contact Toi Mai Workforce Development Council at qualifications@toimai.nz to suggest changes to the content of this skill standard.