

Title	Plan and set up a personal training business within a fitness facility		
Level	4	Credits	12

Purpose	People credited with this unit standard are able to: generate a business plan that addresses all areas of the business; negotiate and secure a suitable personal training contract with a fitness facility; analyse the business processes needed for each area of the business and generate the documents required for operating purposes; and complete familiarisation tasks and preliminary promotional activities within a fitness facility.
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Classification	Fitness > Fitness Assessment and Individual Fitness Instruction
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Available grade	Achieved
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Guidance Information

- 1 Competence in this unit standard requires knowledge of fitness industry Codes of Ethics and Ethical Practice and other codes as may be adopted by the fitness industry from time to time. The Fitness New Zealand Code of Ethics 2005 is available online at <http://www.fitness.co.nz> or from Skills Active Aotearoa at <https://www.skillsactive.org.nz/>. The Register of Exercise Professionals Code of Ethics is available online at <http://www.reps.org.nz> or from Skills Active Aotearoa.
- 2 Competence in this unit standard requires knowledge of relevant provisions of statutes including the Health and Safety in Employment Act 1992, Injury Prevention, Rehabilitation, and Compensation Act 2001, Fair Trading Act 1986, Consumer Guarantees Act 1993, Privacy Act 1993 and subsequent amendments.
- 3 The policies and procedures established by the candidate in Outcome 3 of this unit standard may be used for assessment purposes in Unit 22832, *Operate a personal training business within a fitness facility*.

Outcomes and performance criteria

Outcome 1

Generate a personal training business plan that addresses all areas of the business.

Performance criteria

- 1.1 The major goals of the business are defined against a timeline of 12 months within the personal training business plan.
- Range major goals must include but are not limited to – outputs – turnover/total income, gross costs/total expenses, gross profits; inputs – time, capital, effort.
- 1.2 The major goals of the business are analysed in terms of how they may best be achieved and strategies are documented within the personal training business plan.
- 1.3 The objectives in each business area are defined as key performance indicators against a timeline of 12 months within the personal training business plan and best case, break-even, and likely case scenarios are generated.
- Range objectives must include but are not limited to – outputs – leads, conversion rates, customers, average spend, frequency of spend, fixed costs, variable costs; inputs – hours, capital, effort.
- 1.4 The risks in each business area are analysed and risk management strategies are explained within the personal training business plan.
- Range risks must include but are not limited to – not meeting key performance indicators in any business area and not meeting legal obligations; risk management strategies may include but are not limited to – modifying procedures, completing additional training, purchasing insurance cover, adapting business activities (for example expending more capital, effort, or time in an area), completing a reassessment of the business objectives, completing a reassessment of the business opportunity.

Outcome 2

Negotiate and secure a suitable personal training contract with a fitness facility.

Performance criteria

- 2.1 Prior to meeting, bargaining range and fallback positions are identified, through reflection on the candidate's business needs and risk management strategies as covered in the candidate's business plan, and not disclosed to other contracting parties.
- Range bargaining and fallback positions may include but are not limited to – minimum settlement points, addition, removal, or modification of clauses.
- 2.2 Prior to meeting, bargaining strengths and weaknesses of other contracting parties are identified and strategies for dealing with objections are identified.

2.3 Negotiation meeting is conducted on a win-win basis with opinions of all contracting parties solicited and considered.

Range meeting may include but is not limited to – negotiating one-to-one, one-to-many, many-to-one, many-to many; win-win basis includes but is not limited to – negotiations and situations which consider every contributing party's contribution and viewpoint equally, procedures and methods which lead to solutions which satisfy every party equally.

2.4 Negotiations are courteous, calm, and fair, and arguments presented are based on fact.

2.5 Agreement which is satisfactory to all contracting parties is achieved.

Outcome 3

Analyse the business processes needed for each area of the business and generate the documents required for operating purposes.

Range business areas include – marketing/promotion (leads generation), sales (conversion rates, customers, average spend, frequency of spend), service delivery (client screening and testing, exercise prescription, session delivery, and client support), finance/accounting (turnover, fixed costs, flexible costs, gross profit, tax, net profit), legal, and insurance.

Performance criteria

3.1 For each business area the business policies and procedures needed are documented.

Range policies and procedures must include – responsibilities, accountabilities, inputs, and outputs.

3.2 Documents and/or the software required for the operation of the business are produced or acquired from existing sources and where necessary adapted.

Outcome 4

Complete familiarisation tasks and preliminary promotional activities within a fitness facility.

Performance criteria

4.1 People identified in key roles within the fitness facility are informed in terms of the candidate's personal training services and the candidate's target market for referral.

4.2 Where applicable promotional material is produced and placed according to the candidate's business plan.

- 4.3 Potential personal training client information from sources identified in the candidate's business plan are gathered in line with the Privacy Act and contract arrangements made with the fitness facility.
- 4.4 Familiarisation tasks undertaken at the facility enable candidate to use all of the equipment they plan to train clients on, to navigate and provide guidance to clients on the facility's layout, and to provide clients with accurate and current information on facility's policies that may affect the client's usage of, and access to, the facility.

This unit standard is expiring. Assessment against the standard must take place by the last date for assessment set out below.

Status information and last date for assessment for superseded versions

Process	Version	Date	Last Date for Assessment
Registration	1	27 October 2006	31 December 2020
Review	2	28 November 2019	31 December 2020

Consent and Moderation Requirements (CMR) reference	0069
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This CMR can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.