

<b>Title</b>	<b>Operate a personal training business within a fitness facility</b>		
<b>Level</b>	<b>4</b>	<b>Credits</b>	<b>15</b>

<b>Purpose</b>	People credited with this standard are able to: recruit, induct, train, and support personal training clients; and complete personal training business administration tasks.
----------------	--

<b>Classification</b>	Fitness > Fitness Assessment and Individual Fitness Instruction
-----------------------	---

<b>Available grade</b>	Achieved
------------------------	----------

### Guidance Information

- 1 *A lead* is any person for whom the candidate knows their overall goal, current situation, time-frames, and reasons for initially taking action.
- 2 In this unit standard the term *candidate's documented policies and procedures* refers to the policies and procedures the candidate must have documented prior to starting their business in order to operate effectively and meet their contractual obligations with the fitness facility and comply with legislated requirements. These policies and procedures may be those produced by the candidate as evidence for Outcome 3 of Unit 22831, *Set up a personal training business within a fitness facility*.
- 3 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.
- 4 Competence in this unit standard requires compliance with 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.
- 5 *Client policy forms* typically contain payment policies, cancellation policies and any other policies relevant to the client and their engagement with the personal trainer.

### Outcomes and performance criteria

#### Outcome 1

Recruit personal training clients.

**Performance criteria**

- 1.1 Leads are generated in accordance with the candidate's documented policies and procedures.
- Range evidence of a minimum of ten leads is required.
- 1.2 Introductory meetings are scheduled.
- Range must include but is not limited to – formal sit downs diarised, meeting place and time confirmed; evidence of a minimum of three introductory meetings is required.
- 1.3 Introductory meetings are carried out with potential clients, and their needs are established and recorded on a client profile form, in accordance with the candidate's policies and procedures.
- Range evidence of a minimum of three potential client consultations is required.
- 1.4 Exercise plans that clearly allocate tasks to the candidate and client are produced and proposed to the client as solutions that meet their needs.
- Range evidence of a minimum of three exercise plans is required.
- 1.5 Objections are addressed, and personal training involvement is negotiated where possible.
- Range evidence of a minimum of three objections being addressed in actual workplace assessment situations or six objections being addressed in role-play assessment situations is required.
- 1.6 Candidate confirms client's involvement and commitment in accordance with the candidate's documented policies and procedures.
- Range must include but is not limited to – signing forms (for example consent forms, payment policies, cancellation forms); evidence of at least two signed client consent forms and two signed client policy forms is required.
- 1.7 Candidate arranges first training session and gives client preparation advice in accordance with the candidate's documented policies and procedures.
- Range must include but is not limited to – session outline, session location and time, pre-session preparation, copies of signed candidate policy and procedure forms, pertinent fitness facility information (for example opening times, parking, locker use).

**Outcome 2**

Induct personal training clients.

Range a minimum of three clients is required.

**Performance criteria**

2.1 Training procedures are established with client.

Range must include but is not limited to – client record keeping requirements, client use of the facility.

2.2 The client's physical capabilities and responses to exercise and the exercise environment are assessed in accordance with the candidate's documented policies and procedures.

Range assessment must include – assessment of client response to exercise mode (for example localised fatigue, boredom) and exercise environment (for example level of anxiety or enjoyment); assessment must include at least one of – range of motion assessment, cardiovascular testing, strength testing, primary movement pattern assessment.

2.3 Client is introduced to exercises and any equipment to be used, and the specific features and benefits of each exercise for the client are outlined in accordance with the candidate's documented policies and procedures.

2.4 Induction debrief is completed and next appointment is confirmed with client.

Range must include but not limited to – what has been achieved, how it will contribute to successful training and client results, training procedures and what any assessment results mean for them, answering of any client questions, diarising next appointment.

2.5 Candidate completes record keeping for session and prescription for next personal training session.

Range record keeping for session must include but is not limited to – session notes about client needs, responses, preferences and capabilities; prescription for next personal training session may include but is not limited to – exercises (including warm up, cardiovascular conditioning, muscle conditioning – strength, power, stamina, cool down), intensities, work/rest timing, durations, technique points.

**Outcome 3**

Train personal training clients.

Range a minimum of two clients is required.

**Performance criteria**

- 3.1 Candidate is on time and professionally presented.
- Range professional presentation must include but is not limited to – footwear, clothing, personal grooming.
- 3.2 Client is met and greeted positively.
- Range must include but is not limited to – eye contact, positive body language, positive language.
- 3.3 Rapport and open communication with the client are established and the client's current physical and emotional state is identified.
- Range must include but is not limited to – open ended questions about the client's day and how they are feeling (physically and emotionally), active listening, positive body language.
- 3.4 Session plan is explained to the client and client input is requested.
- Range must include but is not limited to – session aims, session components (for example warm up, cardiovascular, resistance, cool down), durations, intensity, peaks, features and benefits (how the session 'fits' with the client's overall goal), offering the client an opportunity to input into the planned session.
- 3.5 Session plan is adapted in response to client's physical and emotional state and wishes where required.
- Range may include but is not limited to – changes in intensities, durations, peaks or exercises, mode.
- 3.6 Session is conducted according to the plan, and exercise, environment and candidate communication are managed to maximise the benefits and enjoyment of the session by the client.
- Range must include but is not limited to – checking the client's reaction to and enjoyment of the session through observation and questioning, adjustment of environment in response to client's enjoyment and session goals (including safety) where required, adjustment of candidate communication (both verbal and non-verbal) in response to client's enjoyment, entertainment and session goals where required, adjustment of exercise variables in response to client's enjoyment and capabilities where required.

- 3.7 Session debrief is completed and next appointment is confirmed with client.
- Range must include but is not limited to – what has been achieved, how it will contribute to successful training and client results, diarising next appointment;  
may include – prompting client to confirm their understanding of exercises and the benefits, answering of any client questions.
- 3.8 Candidate completes record keeping for session and prescription for next personal training session in accordance with the candidate's documented policies and procedures.
- Range record keeping for session may include but is not limited to – session notes about client needs, responses, preferences and capabilities;  
prescription for the next personal training session may include but is not limited to – exercises (including warm up, cardiovascular conditioning, muscle conditioning – strength, power, stamina, cool down), intensities, work/rest timing, durations, technique points.

#### **Outcome 4**

Support personal training clients.

Range a minimum of three clients is required.

#### **Performance criteria**

- 4.1 Planned support is provided to clients to overcome barriers and maximise achievement against the exercise plan.
- Range may include but is not limited to – support tasks as allocated in the exercise plan to the candidate (for example telephone calls, notes to be left, actions if client attendance wavers, formal 'sit downs', programme reviews), information to be sent/given (monthly newsletters, progress reports), scheduled review sessions, celebration of important dates and results.
- 4.2 Incidental support is provided to clients to overcome barriers and maximise achievement against the exercise plan.
- Range may include but is not limited to – support tasks as required to help the client achieve their exercise plan (for example telephone calls, notes, approaches in the club), discussions using the clients goals, timeframes, progress and reasons for initially taking action as a motivational tool, additional actions when client attendance wavers (for example review sessions, formal 'sit downs' to chat about results, programme adaptation), additional information to be sent in response to client experiences and requests (for example nutritional information, topical information based on the client's exercise goals).

## Outcome 5

Complete personal training business administration tasks.

### Performance criteria

5.1 Daily record keeping is completed in accordance with the candidate's documented policies and procedures.

Range must include – collecting receipts for purchases, diarising client sessions, noting non-attendance at sessions, noting actions achieved in diary and allocating actions to the next day including prioritising actions and describing any detail required; may include but is not limited to – issuing receipts, updating client concession tickets, reviewing and writing on client training cards/sheets, starting new client files as required.

5.2 Weekly administration tasks are completed in accordance with the candidate's documented policies and procedures.

Range must include – filing receipts and invoices, updating client files for currency (for example contact details, achievements, new medications, injuries), reviewing weekly performance on a summary sheet (for example sessions taken, income, introduction sessions/formal 'sit downs', new leads this week – including where they came from, current leads, new clients, lost clients, current number of clients, conversion rate this week, retention rate this week, gross profit, actions for next week; may include but is not limited to – updating accounts in line with bank statements (reconciliation).

5.3 Monthly administration tasks are completed in accordance with the candidate's documented policies and procedures.

Range must include – monthly invoices, receipts and bank statements to accountant or filed for future accounting needs, IRD requirements met, review of month's achievements against business plan, update of business plan and action list compiled for the following month and allocated to weeks in that month.

**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

<b>Consent and Moderation Requirements (CMR) reference</b>	0069
--	------

This CMR can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.

This unit standard is expiring