

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.

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	23 November 2017	31 December 2027
Review	2	27 March 2025	31 December 2027

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>.