

Trainer: _____

Month: _____



MANAGER BUSINESS PLAN

KPIs		MEMBERSHIP		PERSONAL TRAINING	
Calls		New Leads		FC Scheduled	
Texts		Appointments		FC Show	
Emails		Show %		Closed %	
Not Contacted		Close %		POS PT %	
Total Follow-ups		Walk-Ins		New PT Clients	
Initial Contact		Online Sign-ups		PT Penetration %	

MEMBERS		PERFORMANCE		GOALS	
New Units		Top Line Revenue		Remit Goal	
Transfers In		MTM Change		Total Remit	
Transfers Out		Attrition %		PT Remit Goal	
Cancellations		MTM Change		Total PT	
RFC Collections		Operational Ex.		Member Goal	
Net Positive		MTM Change		Total Members	

UPCOMING PIF RENEWAL OPPORTUNITY

NAME	RENEWAL DATE	AMOUNT	Y/N	Notes

CULTURE

Top Users Posted to Social Media

Member of the month? Posted in-club and on Social Media

MANAGER BUSINESS PLAN

REPORTING

RFC Report Completed? Call, Text and E-mailed Clean Slate Opportunity?

Skip Months Report Completed?

Monthly Production Reports double checked and completed? Deposits done and balanced?

(Circle the number that best represents your answer. 1 = strongly disagree, 10 = strongly agree)

I have completed a club walk through every morning and night.

1-----2-----3-----4-----5-----6-----7-----8-----9-----10

I have completed all my Vi Smart Engagements every week

1-----2-----3-----4-----5-----6-----7-----8-----9-----10

I double checked all Red Sessions in Club-OS each week.

1-----2-----3-----4-----5-----6-----7-----8-----9-----10

I contacted all delinquents every Tuesday and Thursday.

1-----2-----3-----4-----5-----6-----7-----8-----9-----10

I made at least 2 Social Media club posts each week.

1-----2-----3-----4-----5-----6-----7-----8-----9-----10

I sent the Welcome to the Club Email to all new members.

1-----2-----3-----4-----5-----6-----7-----8-----9-----10

I sent the Thank You Email to all cancellations.

1-----2-----3-----4-----5-----6-----7-----8-----9-----10

I made my health and exercise a focus last month.

1-----2-----3-----4-----5-----6-----7-----8-----9-----10

What could you have done better last month?

Signature: _____