

The Leave With Clients Workbook

By the end you'll have your number (the clients and price that cover your rent and bills), your contract read, an honest list of the clients you can count on, your referral and review asks written, and a weekly marketing slot with a plan for who answers new leads.

FREE WORKBOOK 12 PAGES ABOUT 45 MINUTES

WHAT YOU'LL HAVE AT THE END

- ✓ Your number: how many clients at what price cover your rent and bills
- ✓ An honest count of the clients you can count on, and how many more you need before you leave
- ✓ A referral ask and a review ask written word for word, ready to send
- ✓ A weekly marketing slot on your calendar and a plan for who answers leads

INSIDE

- 1 Work out your number
- 2 Read your contract
- 3 Count the clients you can really count on
- 4 Write your referral ask and review ask
- 5 Put marketing on your calendar and decide who answers leads
- 6 Your 7-day plan

YOUR NAME

START DATE



By Jason O'Dell, founder of RiseForIt. Goes with the free guide [Go Independent as a Personal Trainer Without Losing Clients](#).

STEP 1 OF 5 · LEARN IT

Work out your number

If you leave without knowing how many clients cover your bills, you'll find out the hard way when rent is due. Then you drop your price, take anyone, and stop thinking clearly.

HOW TO DO IT

- 1 Write down every bill you pay each month, including rent, car, phone, food and insurance.
- 2 Add any new costs of going independent, like renting gym space or liability insurance.
- 3 Set the price one client will pay you each month at your new rate.
- 4 Divide your total bills by that monthly price. Round up. That's your number.

EXAMPLE: MAYA, AN IN-PERSON TRAINER IN A COMMERCIAL GYM

Rent \$1,400. Utilities \$170. Car and gas \$450. Phone \$80. Food \$500.

Health and liability insurance \$300. Gym space rental \$400.

Total: \$3,300 a month.

New price: \$50 a session, twice a week, about \$400 a month per client.

$\$3,300 / \$400 = 8.25$. Rounded up: 9 clients.

Your turn on the next page →

STEP 1 OF 5 · YOUR TURN

Work out your number

My monthly bills

Bill	Amount per month

My new price: \$___ a session, ___ sessions a month = \$___ a month per client

Do the math

Monthly income goal (\$)

What one client pays a month
(\$)

Fill in both boxes.

My number: ___ clients at \$___ a month

☐ You're done when you can say out loud how many clients, at what price, cover all your bills.

STEP 2 OF 5 · LEARN IT

Read your contract

Some gym contracts limit what you can say to clients or where you can train after you leave. If you talk to clients first and read later, you can lose them and land in trouble.

HOW TO DO IT

- 1 Find your signed contract or ask your manager for a copy.
- 2 Look for each item on the checklist below and mark it when you find it.
- 3 Write what each part says in plain words, and what it means for you.
- 4 If any part is unclear, ask an employment lawyer before you talk to a single client about leaving.

EXAMPLE: MAYA, AN IN-PERSON TRAINER IN A COMMERCIAL GYM

Non-solicit: I can't ask gym clients to train with me for 6 months after I leave. Means: no pitching clients while I'm employed or for 6 months after.

Notice: 2 weeks in writing. Means: I give notice on a date I pick, not on a bad day.

Non-compete: none found. Means: I can train nearby.

Your turn on the next page →

STEP 2 OF 5 · YOUR TURN

Read your contract

I found and read the part about

- ☐ Non-compete (where and how long I can't train)
- ☐ Non-solicit (whether I can ask clients to follow me)
- ☐ Notice period
- ☐ Who owns client contact details
- ☐ Training clients outside the gym
- ☐ Final pay and commissions

What my contract says

Part	What it says	What it means for me

Anything I need to ask a lawyer about

- ☐
You're done when you know exactly what you can and can't say to your clients, and when.

STEP 3 OF 5 · LEARN IT

Count the clients you can really count on

Some of your gym clients will follow you, but not all of them. If you build your plan on the ones you're only hoping for, you leave short.

HOW TO DO IT

- 1 List every client you train now.
- 2 Mark each one Yes, Maybe or No. Yes means you'd bet your rent on it.
- 3 Write what each Yes would pay you a month at your new price.
- 4 Add up only the Yes column. Subtract it from your bills to see your gap.
- 5 Divide the gap by your monthly price and round up. That's how many new clients you need before you leave.

EXAMPLE: MAYA, AN IN-PERSON TRAINER IN A COMMERCIAL GYM

14 clients: 6 Yes, 4 Maybe, 4 No.

6 Yes x \$400 = \$2,400 a month.

Bills \$3,300 - \$2,400 = \$900 gap.

\$900 / \$400 = 2.25. Rounded up: 3 new clients before I leave.

The 4 Maybes are a bonus, not the plan.

Your turn on the next page →

STEP 3 OF 5 · YOUR TURN

Count the clients you can really count on

My current clients

Client	Sessions a month	Yes / Maybe / No	Monthly at my new price

Yes clients only: ___ x \$___ = \$___ a month

Gap: \$___ (bills) - \$___ (Yes total) = \$___ = ___ new clients needed before I leave

☐ You're done when you know how many new clients you need, counting only your Yes column.

STEP 4 OF 5 · LEARN IT

Write your referral ask and review ask

The clients you train today are the ones who can send you a friend and leave a review a stranger reads later. If you don't write the ask down, you'll hope they think of it, and they won't.

HOW TO DO IT

- 1 Set up a free Google Business Profile in your own name so reviews belong to you.
- 2 Fill in the referral script below so it sounds like you.
- 3 Fill in the review script and paste in your review link.
- 4 Pick 3 happy clients for each ask and write them in the table.
- 5 Send it the same way every time. After each one, write what they said and your next step.

EXAMPLE: MAYA, AN IN-PERSON TRAINER IN A COMMERCIAL GYM

Referral: "Hey Dana, I love training you. Who's one friend who keeps saying they want to get stronger? I'd give them a free first session."

Review: "Hey Luis, would you leave me a quick Google review? Just say you came in for your back and now you deadlift without pain. Here's the link."

Table: Dana, May 3, said her sister Kim, next step text Kim Friday.

Your turn on the next page →

STEP 4 OF 5 · YOUR TURN

Write your referral ask and review ask

My referral ask

Hey first name, I love training you. Who's one friend who keeps saying they want to goal people come to you for? I'd be glad to give them what you'll offer. Just send me their name and I'll take it from there.

My review ask

Hey first name, would you leave me a quick Google review? Just say what you came in for and what changed: their result. Here's the link: review link. Thank you.

Who I asked

Client	Date asked	Referral or review	What they said	Next step



You're done when both asks are written and you've picked the first 3 people for each.

STEP 5 OF 5 · LEARN IT

Put marketing on your calendar and decide who answers leads

A trainer I worked with left to train clients from a gym he built in his backyard, and months later asked for his old job back because, in his words, "I don't know how to get leads." Content takes months to work, so start while the gym still pays you, and decide now who answers new people.

HOW TO DO IT

- 1 Pick one weekly slot for marketing and treat it like a client session you don't cancel.
- 2 List questions clients ask you. Each one is a long video you can cut into Shorts.
- 3 Pick one free tool people can use, like a one-page plan or a simple checklist.
- 4 Decide who replies to messages and sales calls, and when, on a day you train ten hours.
- 5 Use the calculator to see how many calls you'll need to cover your gap.

EXAMPLE: MAYA, AN IN-PERSON TRAINER IN A COMMERCIAL GYM

Slot: Tuesdays 1 to 3 pm.

First video: "Why your back hurts after deadlifts." Cut into 3 Shorts.

Free tool: a one-page home workout for busy parents.

Leads: I check messages at 7 am, noon and 7 pm and reply the same day.

Pipeline: 3 clients needed. I close 1 in 3 calls, 2 in 3 show up, so about 9 calls held and 14 booked.

Your turn on the next page →

STEP 5 OF 5 · YOUR TURN

Put marketing on your calendar and decide who answers leads

My weekly marketing slot (day and time)

Questions clients ask me (my first long videos)

1.

2.

3.

4.

5.

One free tool I can give away

Who answers leads and sales calls, and when they check

Work backwards from the clients you want

New clients you want

Your close rate on calls (%)

How many booked calls show
up (%)

Fill in all three boxes.

- ☐ You're done when your marketing slot is on your calendar and you've named who replies to every new lead.

THE PLAN

Your next 7 days

| One small step a day. Do them in order.

YOUR ANSWERS, IN ONE PLACE

My number

Clients still needed

Marketing slot

ONE SMALL JOB A DAY

Day	Do this	Done	Notes
Day 1	Add up your bills and write your number where you'll see it.	☐	
Day 2	Read your contract and mark what you can and can't say to clients.	☐	
Day 3	Sort your clients into Yes, Maybe and No and work out how many new clients you need.	☐	
Day 4	Set up your Google Business Profile and send your review ask to 3 happy clients.	☐	
Day 5	Send your referral ask to 3 clients and write down what each one said.	☐	
Day 6	Block your weekly marketing slot and record your first long video in it.	☐	
Day 7	Cut that video into Shorts, post one, and write down who answers leads and when.	☐	