

The Booked Call Workbook

By the end you'll have every message you need, from your same-day first reply to your call offer, written and ready to paste. Every open lead will have a next message and a date to send it.

FREE WORKBOOK 12 PAGES ABOUT 45 MINUTES

WHAT YOU'LL HAVE AT THE END

- ✓ A same-day first reply you can paste in seconds, plus set times each day to check your messages
- ✓ Next-day messages for leads who answered and for leads who went quiet
- ✓ A check-in for every step of your free tool, and a call offer built around the lead's goal
- ✓ One sheet with every open lead, their next message and the date you'll send it

INSIDE

- 1 Write your same-day first reply
- 2 Write your next-day messages
- 3 Write a check-in for each step of your free tool
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- 5 Put every open lead on one sheet
- 6 Your 7-day plan

YOUR NAME

START DATE



By Jason O'Dell, founder of RiseForIt. Goes with the free guide [Follow Up With Personal Training Leads and Turn Them Into Booked Calls](#).

STEP 1 OF 5 · LEARN IT

Write your same-day first reply

A lead cares most in the moment they message you. If you wait until tomorrow or send a price, that feeling fades and they compare you on price instead of talking to you.

HOW TO DO IT

- 1 Pick two or three set times a day to check your DMs and forms. That way every lead gets an answer the same day, ideally within the hour.
- 2 Start with a short thank you. One line is enough.
- 3 Ask one question about them: what made them reach out today?
- 4 Leave your price out, even if they asked for it. Say you're happy to go through it.
- 5 Read it out loud. If it sounds like a form letter, cut words until it sounds like you.

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

My check times: 7am, 12pm, 6pm

Jess DMs me: 'How much is coaching?'

My reply: 'Thanks for reaching out, Jess! Happy to go through it. What made you message today?'

Price sent: no

Your turn on the next page →

STEP 1 OF 5 · YOUR TURN

Write your same-day first reply

The times you'll check your DMs and forms every day

Your first reply

Thanks for reaching out, first name ! one short line in your own words . What made you message today?

Your reply when they ask for your price first

Thanks, first name ! Happy to go through it. one line on why it depends on them .
So first, what made you reach out today?

Check your reply before you save it

- ☐ It thanks them
- ☐ It asks one question about them
- ☐ It has no price in it
- ☐ You can read it in five seconds
- ☐ It sounds like you talking

- ☐ You're done when your check times are written down and you have a first reply you could paste into a DM right now.

STEP 2 OF 5 · LEARN IT

Write your next-day messages

Most trainers never send message two, so sending it already sets you apart. If it isn't written before you need it, you'll put it off and the lead goes cold.

HOW TO DO IT

- 1 Write two versions: one for leads who answered and one for leads who went quiet.
- 2 If they answered, reply to what they said first. Then ask what they've tried and where they want to be.
- 3 If they went quiet, send one short nudge. Give them something easy to answer, not 'just checking in'.
- 4 Keep each message to two or three lines.

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

Jess answered: 'I want to get back in shape after my second baby.'

My reply: 'That's a big one, and very doable. What have you tried so far, and where would you love to be by summer?'

Lisa went quiet. My nudge: 'Hey Lisa, quick one. Is it more about energy, strength or weight for you? Just reply with one word.'

Your turn on the next page →

STEP 2 OF 5 · YOUR TURN

Write your next-day messages

If they answered

reply to what they said in one line. What have you tried so far, and where would you love to be by when ?

If they went quiet

Hey first name, quick one. Is it more about goal 1, goal 2 or goal 3 for you? Just reply with one word.

Things you could give in a nudge instead of 'just checking in'

1. _____
2. _____
3. _____
4. _____

Make sure neither message says any of these

- ☐ Just checking in!
- ☐ Did you get my last message?
- ☐ Still interested?
- ☐ Here's my price list

- ☐ You're done when both next-day messages are written and neither one says 'just checking in'.

STEP 3 OF 5 · LEARN IT

Write a check-in for each step of your free tool

A message that only asks for a call feels like a chase. When every message responds to something they did, it feels like help and they keep answering.

HOW TO DO IT

- 1 Write down your free tool, like a plan, a guide or a challenge. Then list the steps a lead would take with it.
- 2 For each step, write one check-in that asks how it went.
- 3 Ask how it went for them, not whether they got it. 'How did day one go?' beats 'Did you get it?'
- 4 Add one small helpful thing where you can: a tip, a swap or an easier version.
- 5 No free tool yet? Use the steps of your chat instead: their reason, what they've tried, their goal.

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

Free tool: a 3-day starter plan (PDF)

Downloads it / 'Got it to you! Which day are you starting?'

Finishes day 1 / 'How did the first day go? Anything feel hard? If the squats hurt your knees, try them to a chair.'

Finishes day 3 / 'You finished all three! What felt easiest? I can show you how to build on it.'

Your turn on the next page →

STEP 3 OF 5 · YOUR TURN

Write a check-in for each step of your free tool

Your free tool, in one line

Your check-ins

Step they take	What you'll ask	What you'll give

The check-in you'll use most

Hey first name, how did the step they just took go? Anything feel hard?
one small tip or offer to help

☐

You're done when every step of your free tool has a check-in that asks how it went.

STEP 4 OF 5 · LEARN IT

Write your call offer

If you offer a call before they've said what they want, it's a sales pitch to a stranger. Offer it after, and it's a talk about a goal you already know.

HOW TO DO IT

- 1 Only offer a call once they've told you what they want. For most leads that's day three.
- 2 Say their goal back to them in their own words.
- 3 Offer two real times, not 'let me know when works'.
- 4 Say how long the call takes and what it's for.
- 5 Send it in the app they used. If they DMed, reply in the DM. If they filled in a form, reply to the form.

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

Jess's goal in her words: 'get back in shape after my second baby and feel strong by summer'

My offer: 'You said you want to feel strong again by summer. I'd love to map out how we'd get you there. Free 15-minute call, Thursday at 6pm or Saturday at 10am?'

Sent in: Instagram DM, where she first messaged me

Your turn on the next page →

STEP 4 OF 5 · YOUR TURN

Write your call offer

Only send the offer when you can tick all of these

- ☐ They told me what made them reach out
- ☐ They told me what they've tried
- ☐ They told me where they want to be
- ☐ I'm replying in the same app they used

How long your call is and what you'll cover in it

Your call offer

You said you want to their goal in their words. I'd love to map out how we'd get you there. Free length-minute call, day and time or day and time ?

If they don't pick a time

No rush, first name. Would another day and time be easier? If now isn't the right time, just say so.

- ☐ You're done when your call offer has their goal, a length and two real times in it.

STEP 5 OF 5 · LEARN IT

Put every open lead on one sheet

Most leads don't die from a bad pitch. They die waiting, because you forgot who you owed a message.

HOW TO DO IT

- 1 Go through your DMs, forms, texts and emails from the last 30 days. Write down everyone who reached out and hasn't booked or said no.
- 2 For each one, write where they found you and what they last said.
- 3 Pick their next message from your scripts on pages 1 to 4.
- 4 Write the date you'll send it. Anyone who's been waiting longest gets today's date.
- 5 Keep going until they say no or go quiet after several real messages that each gave them something.

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

Jess / Instagram post / 'Back in shape after my second baby' / Call offer / Today
Lisa / Paid ad form / Nothing since my first reply / Quiet nudge / Today
Ray / Free starter plan / Downloaded it, no word since / 'How did day 1 go?' / Tomorrow
The source whose leads answer most: people who found my posts. The ad form leads go quiet.

Your turn on the next page →

STEP 5 OF 5 · YOUR TURN

Put every open lead on one sheet

Your open leads

Name	Found you through	What they last said	Next message	Send on

The source whose leads answer most, and the one whose leads go quiet

Before you put the sheet away

- ☐ Every lead has a next message
- ☐ Every lead has a send date
- ☐ The leads who've waited longest are marked for today
- ☐ Anyone who said no is crossed off

☐ You're done when every open lead has a next message and a date, and today's messages are sent.

THE PLAN

Your next 7 days

One small step a day, using the messages you just wrote.

YOUR ANSWERS, IN ONE PLACE

Check messages at

ONE SMALL JOB A DAY

Day	Do this	Done	Notes
Day 1	Reply to anyone who's waiting, using your first reply. Set phone reminders for your check times.	☐	
Day 2	Send your next-day messages: the tried-and-goal question to leads who answered, your nudge to leads who went quiet.	☐	
Day 3	Send your call offer, with two real times, to every lead who has told you what they want.	☐	
Day 4	Send your step check-in to everyone who grabbed your free tool.	☐	
Day 5	Save all your scripts as quick replies or notes on your phone so each one takes seconds to send.	☐	
Day 6	Update your lead sheet: add new leads, mark who answered and who booked, and set next send dates.	☐	
Day 7	Cross off anyone who said no or went quiet after several real tries. Note which source sends leads who answer.	☐	