

The Consistent Clients Workbook

By the end you'll have a fixed weekly check-in day, a midweek touch for every client, a five-minute form ready to send, a reply template you can use within a day, and a same-day message for missed check-ins.

FREE WORKBOOK 12 PAGES ABOUT 45 MINUTES

WHAT YOU'LL HAVE AT THE END

- ✓ A check-in day, a reply time and a midweek touch for every client, already in your calendar
- ✓ A short check-in form you've tested yourself in under five minutes, with the link saved
- ✓ A reply template and a missed check-in message you can send without starting from scratch
- ✓ A proof vault page for saving client struggles you can turn into videos

INSIDE

- 1 Set your check-in rhythm
- 2 Build your five-minute check-in form
- 3 Write your reply template
- 4 Write your missed check-in message
- 5 Save client struggles for your content
- 6 Your 7-day plan

YOUR NAME

START DATE



By Jason O'Dell, founder of RiseForIt. Goes with the free guide [Build a Weekly Check-In That Keeps Online Coaching Clients Consistent](#).

STEP 1 OF 5 · LEARN IT

Set your check-in rhythm

When the check-in day moves around, clients have to remember it, and the ones who forget start to drift. A fixed day plus one short midweek touch turns checking in into a habit they don't have to think about.

HOW TO DO IT

- 1 Pick one check-in day for every client. Sunday or Monday works for most, because it closes one week and plans the next.
- 2 Pick the time the form goes out and the time you'll read and reply, within a day. Put both in your calendar as repeating blocks.
- 3 Pick one midweek touch for each client: a voice note, a quick 'how did Tuesday's session feel', or a reply to a meal photo.
- 4 Test it against your worst month. If you couldn't keep it up then, cut it back. Don't go daily unless a client asks for it.
- 5 Send every client one message telling them the day and when to expect your reply.

EXAMPLE: DRE, AN IN-PERSON TRAINER COACHING 8 CLIENTS ONLINE

Check-in day: Sunday. Form goes out at 9am.

I read and reply: Monday by 12pm.

Midweek touch: Wednesday voice note for all 8, under a minute each.

Worst-month test: 8 voice notes is about 10 minutes. I can keep that.

Your turn on the next page →

STEP 1 OF 5 · YOUR TURN

Set your check-in rhythm

My check-in day and the time the form goes out

When I'll read and reply (within a day of the form)

Midweek touch for each client

Client	Touch (voice note, question, meal photo reply)	Day I'll send it

Message to tell your clients

Hey first name, starting date, your check-in is every day. It takes about five minutes. I'll reply by reply day and time with one thing you did well and one thing to try next week. You'll also hear from me on midweek day.

- ☐
- You're done when every client has a midweek touch next to their name and your form time and reply time are both in your calendar.

STEP 2 OF 5 · LEARN IT

Build your five-minute check-in form

A long questionnaire gets filled out on day one and skipped by week six. Every question has to earn its place, and the win and struggle questions matter more than the numbers.

HOW TO DO IT

- 1 Tick the questions below that fit your plan.
- 2 Cut anything you won't act on. If steps aren't part of your plan, drop steps.
- 3 Write each question you kept in your own words in the table. Eight to ten questions is plenty.
- 4 Fill out the form yourself with a timer running. If it takes more than five minutes, cut again.
- 5 Put it in the tool you already use, like a Google Form or your coaching app, and save the link.

EXAMPLE: DRE, AN IN-PERSON TRAINER COACHING 8 CLIENTS ONLINE

Kept: body, training, food, recovery, win, struggle, next week. Cut: steps, not in my plans.

Body: What was your average weight this week? Photos every 3 weeks.

Struggle: What got in the way, and what do you think would fix it?

Timed it myself: 4 minutes. Link saved in my phone notes.

Your turn on the next page →

STEP 2 OF 5 · YOUR TURN

Build your five-minute check-in form

Questions I'm keeping

- ☐ Body: average weight for the week (waist or photos every 2 to 4 weeks)
- ☐ Training: sessions finished out of the plan, any lift that went up or felt off
- ☐ Food: 1 to 10, how close to the plan, and what made the hardest day hard
- ☐ Recovery: average sleep, energy 1 to 10, stress 1 to 10
- ☐ Movement: daily steps (only if steps are in the plan)
- ☐ Win: one thing you're proud of this week
- ☐ Struggle: what got in the way, and what would fix it
- ☐ Next week: travel, a busy stretch at work, or an event coming up

My form, in my words

Section	The exact question I'll ask

How long it took me, and where my form link lives

- ☐
You're done when you've filled out your own form in under five minutes and the link is saved where you can find it.

STEP 3 OF 5 · LEARN IT

Write your reply template

A form nobody answers is just a diary. 'Great job, keep going' could be sent to anyone, but a fast reply with the client's own words in it is what makes them feel coached instead of managed.

HOW TO DO IT

- 1 Read the check-in within a day. Start with the struggle answer, because it often hands you the fix.
- 2 Name one win, using their words.
- 3 Name one change that makes next week easier. Don't grade last week.
- 4 Give one clear action with a day attached.
- 5 Before you send, check that at least one phrase they wrote is in your reply.

EXAMPLE: DRE REPLYING TO A CLIENT'S SUNDAY CHECK-IN

Client wrote: 'Sunday meal prep saved my week.' and 'I missed Thursday because work ran late again.'

Win: You said Sunday meal prep saved your week, so let's do it again and add Wednesday.

Change: Thursday's session moves to Friday morning and drops to 30 minutes.

Action: Friday at 7am, the 30-minute session is in your app now.

Your turn on the next page →

STEP 3 OF 5 · YOUR TURN

Write your reply template

My reply template

Hey first name, thanks for checking in. You said their words about the win, and that's a big deal because why it matters. You mentioned their words about the struggle, so let's one change that makes next week easier. Your one action this week: clear action and the day. Talk midweek touch day.

Practice on this week's check-ins

Client	Their words (win)	Their words (struggle)	One change	One action

My reply rule: when I reply, and what every reply must have

☐

You're done when your template is saved and you've filled at least one practice row with a real client's own words.

STEP 4 OF 5 · LEARN IT

Write your missed check-in message

Most clients quit after a bad week nobody noticed, and one missed week turns into three. A missed check-in often means the plan got too heavy, not that the client stopped caring.

HOW TO DO IT

- 1 Set a cutoff time on check-in day. If there's no form by then, you message that same day.
- 2 Write one short message with no guilt in it and one easy question, like 'what got in the way this week?'
- 3 When they answer, make the next step smaller: fewer sessions, shorter sessions, or one habit instead of three.
- 4 If a client is clearly stuck, offer a quick call. Save calls for that and for monthly reviews.
- 5 If several clients skip the form, cut questions before you add reminders.

EXAMPLE: DRE, WHEN A CLIENT MISSES A SUNDAY CHECK-IN

Cutoff: Sunday 6pm.

Message: 'Hey Sam, didn't see your check-in come through, no stress. What got in the way this week?'

Sam said work blew up.

Smaller next step: 2 sessions instead of 3, 30 minutes each, for one week.

Your turn on the next page →

STEP 4 OF 5 · YOUR TURN

Write your missed check-in message

My cutoff: if there's no form by this time on check-in day, I message that day

My same-day message

Hey first name, didn't see your check-in come through, no stress at all. What got in the way this week? One line is plenty, or easy option, like a quick voice note.

How I'll make the next step smaller

If the plan is...	Make it...

- ☐
You're done when your cutoff time is set and your same-day message is saved where you can send it in under a minute.

STEP 5 OF 5 · LEARN IT

Save client struggles for your content

My first three online trainers all ghosted for the same reason: 'I just don't know what to post.' Your check-ins answer that every week, because every struggle a client writes down is a problem other people in your pond have too.

HOW TO DO IT

- 1 After you reply to check-ins, copy each struggle into your proof vault below. Leave out names.
- 2 Write the fix you gave in one line.
- 3 Turn one struggle into a video idea: their problem, your fix, and why you're the one to hand it over.
- 4 Answer it on check-in day, film it the next day.

EXAMPLE: DRE'S PROOF VAULT, ONE ROW

Struggle: 'I missed Thursday because work ran late again.'

Fix I gave: a shorter session on a day work can't take over.

Video idea: 'Missing workouts because work runs late? Move the session, make it shorter.'

Film date: Monday.

Your turn on the next page →

STEP 5 OF 5 · YOUR TURN

Save client struggles for your content

My proof vault

Struggle (their words, no name)	The fix I gave	Video idea	Film date

This week's video: the problem, my fix, and why I'm the one to hand it over



You're done when your vault has at least three struggles in it and one has a film date.

THE PLAN

Your next 7 days

Small steps, one a day, and by day 7 your check-in is running.

YOUR ANSWERS, IN ONE PLACE

Check-in day

Form link

Reply rule

Missed check-in cutoff

ONE SMALL JOB A DAY

Day	Do this	Done	Notes
Day 1	Pick your check-in day and reply time, and put both in your calendar as repeating blocks.	☐	
Day 2	Build your form, time yourself filling it out, cut until it's under five minutes, and save the link.	☐	
Day 3	Send every client the message with their check-in day, your reply time and the form link.	☐	
Day 4	Send each client their midweek touch, a voice note or a one-line question.	☐	
Day 5	Save your reply template and your missed check-in message in your phone notes, and set your cutoff time.	☐	
Day 6	Send the form on your check-in day. Message anyone who misses your cutoff that same day.	☐	
Day 7	Reply to every check-in within a day using their own words, and copy each struggle into your proof vault.	☐	