

The Re-Sign and Refer Workbook

By the end you'll have every client on one sheet with a next goal and a re-test date, the messages that pull drifting clients back, and a referral offer you'll use at the next win.

FREE WORKBOOK 12 PAGES ABOUT 50 MINUTES

WHAT YOU'LL HAVE AT THE END

- ✓ A Monday sheet that shows who is drifting before they cancel
- ✓ Four no-guilt messages saved in your phone and ready to send
- ✓ A finish line, a baseline and a re-test date for every client, plus your next week 10 talk booked
- ✓ A referral offer, one link, and the exact words to ask at the next win

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YOUR NAME

START DATE



By Jason O'Dell, founder of RiseForIt. Goes with the free guide [Get Personal Training Clients to Re-Sign and Refer Their Friends](#).

STEP 1 OF 5 · LEARN IT

Build your Monday sheet and spot who is drifting

At the gyms I ran, the trainers "didn't have to do much, just be a body who speaks words." I did the sales, the programs, the retention and the admin, and that taught me retention only happens when someone owns it on purpose. If you train on your own, that someone is you, and the drift shows up weeks before the cancel text.

HOW TO DO IT

- 1 Write every paying client in the first table, one per row.
- 2 Fill in sessions this week, their last reply, their last win, and their next goal.
- 3 Look for these signs: two missed sessions in a row, replies getting shorter or slower, no new win in three weeks, talk about money or a busy season, goal almost reached.
- 4 For each sign, write the move: no-guilt text for missed sessions, a call for short replies, one program change plus a Friday target for no wins, a lighter plan for money or busy talk, a booked next-goal talk for a goal almost reached.
- 5 Act within 24 hours. Read this sheet every Monday.

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

Maria / 0 of 2 / 5 days ago, one word / first full push-up, 4 weeks ago / 10 lb down by June 1

Derek / 3 of 3 / yesterday, long reply / deadlift 225, last week / squat pain-free, almost there

Tasha / 2 of 3 / 2 days ago / none in 3 weeks / run a 5K by Sept 14

Signs: Maria missed two in a row and has no win in 3 weeks. Derek's goal is almost reached. Tasha has no win in 3 weeks.

Moves: Maria gets a no-guilt text today. Derek gets his next-goal talk booked this week.

Tasha gets one exercise swapped and a target she can hit by Friday.

Retention: 14 paid on the 1st of last month, 12 still pay. $12 / 14 = 86\%$.

Your turn on the next page →

STEP 1 OF 5 · YOUR TURN

Build your Monday sheet and spot who is drifting

Your Monday sheet

Client	Sessions this week	Last reply	Last win	Next goal

Warning signs you see right now

Client	Sign you saw	Your move	By when (within 24 hours)

Your retention: clients paying on the 1st of last month ___ / still paying now ___ = ___ %

The first client you'll reach out to, and what you'll send or say

☐ You're done when every client is on the sheet and every warning sign has a move and a deadline next to it.

STEP 2 OF 5 · LEARN IT

Write your no-guilt messages before you need them

If you write the message while you're worried, it comes out as "where were you?" Clients who missed a few sessions already feel embarrassed, and guilt makes them hide instead of coming back.

HOW TO DO IT

- 1 Fill in every blank below with your own words and your own offer.
- 2 Keep each message to three lines or less. No questions about why they missed.
- 3 Always give them an easy way back: a smaller week, a lighter plan, or a new small target.
- 4 When replies get short or slow, call instead of texting. Use the call opener.
- 5 Save all four in your phone notes or as text shortcuts so you can send within 24 hours.

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

Missed sessions: "Hey Maria, no stress about last week. Life happens. Want me to cut this week to two 30-minute sessions so you're back in the rhythm?"

Call opener: "Hey Tasha, it's Maya. Nothing's wrong. Is the program still fitting your life right now?"

Lighter plan: "Hey Derek, you mentioned work is slammed until spring. Want to switch to two sessions a month plus app check-ins until then?"

New target: "Tasha, new target: run 3 minutes without stopping by Friday. I swapped lunges for step-ups to get you there."

Your turn on the next page →

STEP 2 OF 5 · YOUR TURN

Write your no-guilt messages before you need them**Two missed sessions in a row**

Hey first name, no stress about last week. Life happens. Want me to cut this week to smaller week, like two 30-minute sessions so you're back in the rhythm?

Call opener when replies get short or slow

Hey first name, it's your name. Nothing's wrong. Is the program still fitting your life right now? what they said Okay, here's one thing I'll change: one change.

Lighter plan when money or a busy season comes up

Hey first name, you mentioned money / the busy season. Want to switch to number sessions a month plus online check-ins until date or season? Same coaching, fits what's going on.

No new win in three weeks

first name, new target for this week: small target by Friday. I swapped old exercise for new exercise to get you there.

☐ You're done when all four messages are filled in and saved in your phone.

STEP 3 OF 5 · LEARN IT

Set up progress each client can see

Clients re-sign when they can see they're winning. "Get in shape" never shows up anywhere, so they decide nothing is happening and drift.

HOW TO DO IT

- 1 Write each client's finish line: exactly where they want to be at the end of the 12-week block, with a date.
- 2 Work back from that date to a target they can hit this week.
- 3 Pick baseline numbers that move faster than the scale: push-ups in a minute, a timed walk, how their jeans fit, a photo.
- 4 Put a re-test on the calendar every four weeks. Show the numbers side by side and celebrate small wins out loud.
- 5 Send one short check-in text a week and answer fast. Each block, swap one or two exercises and keep the lifts they love.

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

Tasha / Run a 5K without walking by Sept 14 / 1 mile walk/run 13:40, 12 push-ups in a minute, photo / Run 3 minutes without stopping, twice / Re-test July 20

Weekly text: "Quick one: how did Tuesday's legs feel, 1 to 10? And did you hit your protein yesterday?"

Swap this block: lunges out, step-ups in. Kept her trap-bar deadlift because she loves it.

Where clients notice each other: small group session the first Saturday of each month.

Your turn on the next page →

STEP 3 OF 5 · YOUR TURN

Set up progress each client can see

Progress plan for each client

Client	Finish line + date	Baseline numbers	This week's target	Re-test date

Your weekly check-in text

Quick one: how did session day's workout feel, 1 to 10? And did you one habit yesterday?

Exercises you'll swap next block, and the lifts you'll keep

Where your clients can notice each other (a monthly small group date, or a chat for posting wins)

The first re-test you'll book: client and date

☐ You're done when every client has a finish line with a date and a re-test on the calendar.

STEP 4 OF 5 · LEARN IT

Book the next-goal talk and protect your price

If the next step isn't on the table before the block ends, the client hits their goal with nothing pulling them forward. Cutting your rate to keep someone just teaches everyone your price bends.

HOW TO DO IT

- 1 Find the date each client's block ends. Count back to week 10 and book the next-goal talk there.
- 2 Open with what they came in wanting and what they can do now.
- 3 Ask where they want to be next, with a date. Talk about where they'll land, not the sets and reps.
- 4 Write a smaller plan at your full rate for clients whose money gets tight, like two sessions a month plus app check-ins.
- 5 If a client is fading, run the self-check first. Say "my fault" and fix what you control. If it's a true mismatch, hand them to a trainer who fits better.

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

Derek / Block ends Aug 30 / Talk Aug 16 / Squat without knee pain / Hike a full day with his kids by October

Talk: "Derek, you came in wanting to squat without knee pain. You're doing it now. Where do you want to be by fall? Picture that whole day out on the trail with your kids."

Smaller plan: two sessions a month plus app check-ins, same rate per session.

Self-check on Tasha: I used the same warm-up for six weeks. My fault. Changing it Monday.

Your turn on the next page →

STEP 4 OF 5 · YOUR TURN

Book the next-goal talk and protect your price

Next-goal talks

Client	Block ends	Week 10 talk date	Came in wanting	Next goal + date

Your next-goal talk

first name

, you came in wanting

first goal

. You're

what they can do now

. Where do you want to be by

season or date

?

what they said

 Picture

where they'll land

. The next 12 weeks gets you there.

Your smaller plan, at your full rate (sessions a month, check-ins, price)

Self-check before you blame a fading client

- ☐ I showed up prepared
- ☐ I listened to what they told me
- ☐ I changed the plan when it stopped working
- ☐ I said "my fault" and fixed what I control
- ☐ If it's a true mismatch, I know which trainer to hand them to

Your next week 10 talk: client and date

☐ You're done when every client has a week 10 talk date and your smaller plan is written down.

STEP 5 OF 5 · LEARN IT

Set your referral offer and ask at the next win

Right after a win they're proud of is when a client is most likely to stay and most likely to share. Wait a month and the feeling has faded, and the ask feels like a favor.

HOW TO DO IT

- 1 Write your offer: the friend gets a free first session, and your client gets a free session too.
- 2 Pick one link they can forward by text, like your booking page.
- 3 At the next win, ask right then using your script. Make it a perk, not a favor.
- 4 Ask to film two minutes using the four questions. Post the clip on your Instagram Reels and your booking page.
- 5 If the friend doesn't sign, thank your client anyway and keep the friend on your list. If a client never refers, don't push. Their story can do it.

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

Offer: friend gets a free first session, Maria gets a free session.

Link: Maya's booking page, saved in her phone so she can text it in one tap.

Ask: "You just did your first full push-up. Who in your life would want to feel this? I'll give them a free first session, and you get a free session too. Here's the link."

Filmed 2 minutes with Maria. Posted to Reels and the booking page.

Your turn on the next page →

STEP 5 OF 5 · YOUR TURN

Set your referral offer and ask at the next win

Your referral offer: what the friend gets, what your client gets, and your link

Your ask at the win

You just their win. Who in your life would want to feel this? I'll give them friend's reward, and you get client's reward. Here's the link: your link.

Recent and coming wins

Client	Win	Date	Asked for referral?	Filmed?

Questions for the 2-minute clip

- ☐ What was going on before you started?
- ☐ What almost stopped you from signing up?
- ☐ What can you do now that you couldn't before?
- ☐ What would you tell a friend who's on the fence?
- ☐ Clip posted to Reels and your booking page

☐ You're done when your offer and link are written and you know which client's next win you'll ask at.

THE PLAN

Your next 7 days

One small action a day. Day 1 matters most, so do it first.

YOUR ANSWERS, IN ONE PLACE

First reach-out

Book re-test

Next-goal talk

Referral offer

ONE SMALL JOB A DAY

Day	Do this	Done	Notes
Day 1	Send a no-guilt text or make a call to the first drifting client you wrote down.	☐	
Day 2	Send your weekly check-in text to every client and answer every reply the same day.	☐	
Day 3	Book your first re-test and tell the client you'll show their numbers side by side.	☐	
Day 4	Put your next-goal talk on your calendar and the client's.	☐	
Day 5	Set up your referral link and save the ask script in your phone.	☐	
Day 6	At today's first client win, ask for the referral right then and ask to film two minutes.	☐	
Day 7	Update your Monday sheet, count your retention, and circle any new warning signs.	☐	