

The Trial to Client Workbook

By the end you'll have a first-visit routine, a mid-trial check-in, one clear offer with a word-for-word price line, answers to the five common objections, and a lead log with follow-up texts. You'll be ready to run your next trial member from day one to signed.

FREE WORKBOOK 12 PAGES ABOUT 45 MINUTES

WHAT YOU'LL HAVE AT THE END

- ✓ A booking line, a one-week starter plan and a day-one test you can measure again
- ✓ One main offer, one starter pack and a price line you can say from memory
- ✓ Your answers to the five objections you'll hear most, none of them a discount
- ✓ A lead log and ready-to-send texts for check-ins, no-shows, offers and referrals

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- 6 Your 7-day plan

YOUR NAME

START DATE



By Jason O'Dell, founder of RiseForIt. Goes with the free guide [Turn Gym Trial Members and Walk-Ins Into Personal Training Clients](#).

STEP 1 OF 5 · LEARN IT

Run the first visit

If a member leaves the front desk without a booked consult, they train alone, guess for a week and leave. Everything you offer on the last visit is set up on the first one.

HOW TO DO IT

- 1 Greet them by name and tell them you're their trainer for the trial.
- 2 Book a free 20-minute consult before they leave the front desk. Offer two times. Don't ask an open question.
- 3 In the consult, write one goal at the top of the page, in their own words.
- 4 Hand them a plan for the week: three short workouts they can do alone.
- 5 Test one thing you can measure again on the last visit, like a plank hold, push-ups or how their knee feels on the stairs. Write the number down.

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

Greeting: "Hi Dana, I'm Maya. I'm your trainer for your trial."

Booking: "Let's book your free 20-minute consult so you leave with a plan. Thursday at 6 or Saturday at 9?"

Goal in Dana's words: "Walk up the stairs at work without my knee hurting."

Plan: A) 10-minute walk plus 3 leg moves. B) 3 upper body moves. C) 15 minutes of stretching and core.

Day-one test: plank hold, 20 seconds.

Your turn on the next page →

STEP 1 OF 5 · YOUR TURN

Run the first visit

Your greeting and booking line

Hi first name, I'm your name. I'm your trainer for your trial. Let's book your free 20-minute consult so you leave with a plan. day and time or day and time ?

Your one-week starter plan

Workout	Moves	How long

Day-one tests you can measure again later

Test	How you measure it	Best for members who want...

- ☐ You're done when you can say your booking line without reading it, and your starter plan and tests are ready to hand out.

STEP 2 OF 5 · LEARN IT

Set up the mid-trial check-in

The middle of the trial is when members quietly stop coming. If nobody notices, they're gone before you ever make an offer.

HOW TO DO IT

- 1 Halfway through the trial, check each member's attendance in the check-in system.
- 2 If they came, text them one specific thing about their workout.
- 3 If they didn't come, reach out the same day.
- 4 Invite them to a group class or a small in-gym challenge so they meet people.
- 5 When they reply, answer fast.

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

Came: "Hey Dana, it's Maya. Saw you got in 3 workouts. How did the step-ups feel on your knee?"

Didn't come: "Hey Marcus, it's Maya. Missed you this week, no stress. Want to join me for the circuit class on Saturday at 9?"

Places to invite: Saturday 9am circuit class. Plank challenge on the board by the mats.

Your turn on the next page →

STEP 2 OF 5 · YOUR TURN

Set up the mid-trial check-in

Text for members who came

Hey first name, it's your name. Saw you got in number workouts. How did specific move or workout feel?

Text for members who didn't come

Hey first name, it's your name. Missed you this week, no stress. Want to join me for class or challenge on day at time ?

Group classes or in-gym challenges you can invite members to

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

☐

You're done when both texts are saved in your phone and you have at least two places to invite members.

STEP 3 OF 5 · LEARN IT

Prep your consult and your one offer

Trainers who wing the consult talk too much, then read out a menu of packages. One recommendation followed by silence is easier for you and for the member.

HOW TO DO IT

- 1 On the last visit, retest the day-one test and show them the change on paper.
- 2 Before you sit down, write their goal at the top of the page. Open warmly, ask the four questions and write down their answers.
- 3 Repeat their goal back in their own words. Talk about where they hurt today and where they'll land, not sets and reps.
- 4 Make one recommendation, ask "this week or next?", then stop talking.
- 5 Keep one starter pack as a downsell for someone who truly can't do the full plan. Never cut your main price. Add value instead.

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

Retest: plank went from 20 seconds to 45 seconds. Maya writes both numbers side by side.

Main offer: 2 sessions a week for 12 weeks, \$320 a month.

Starter pack: 3 sessions.

Value to add if needed: an extra check-in each month, or a simple nutrition plan.

Price line: "Based on what you told me, here's what I'd recommend. Two sessions a week for 12 weeks, so you can walk up the stairs at work without your knee hurting. It's \$320 a month. Do you want to start this week or next?" Then she stays quiet.

Your turn on the next page →

STEP 3 OF 5 · YOUR TURN

Prep your consult and your one offer

Your main offer (sessions a week, number of weeks, price a month)

Your starter pack downsell

Value you can add instead of cutting your price

1.

2.

3.

Your consult, in order

- ☐ Opener: "Thanks for sitting down with me. This is about you, not a sales pitch. If training isn't a fit, you still walk out with a plan you can run on your own. Fair?"
- ☐ "What made you walk in this week?"
- ☐ "What have you tried before, and what got in the way?"
- ☐ "If this worked, what would be different in your life six months from now?"
- ☐ "How important is that to you right now, on a scale of 1 to 10?"
- ☐ Repeat their goal back in their own words
- ☐ Recommend one plan, ask, then stop talking

Your price line

Based on what you told me, here's what I'd recommend. number sessions a week for number weeks, so you can their goal in their words. It's price a month. Do you want to start this week or next?

- ☐ You're done when you can say your price line out loud and then stay quiet until they answer.

STEP 4 OF 5 · LEARN IT

Write your answers to the five objections

When you don't have an answer ready, you drop the price or argue. Both lose the sale and the member's trust.

HOW TO DO IT

- 1 For each objection, write the question you'll ask to find the real worry.
- 2 Write the one thing you'll do next: offer the starter pack, show the retest again, invite the partner, or book the next talk.
- 3 Use their goal and their retest numbers in your answer.
- 4 If it's a clear no, stop pushing. Book a day and time to talk again before they leave.

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

Too expensive: "Totally fair. Is it the monthly number, or is it whether this will actually work for you?" If it's the number, she offers the 3-session starter pack. If it's whether it works, she shows the 20 to 45 second plank again.

I need to think about it: "Of course. What part do you want to think through? Usually it's money, time, or whether it'll work." She answers that one thing. If it's still a no, she books Monday at 5 to talk again.

I need to ask my partner: "Makes sense. Want to bring them to your next session so they can see it for themselves?"

Your turn on the next page →

STEP 4 OF 5 · YOUR TURN

Write your answers to the five objections

Your objection answers (too expensive, I'll do it myself, I need to think about it, I don't have time, I need to ask my partner)

What they say	What you'll ask or say	What you'll do next

☐
 You're done when every row has something you'd really say and a next step that isn't a discount.

STEP 5 OF 5 · LEARN IT

Set up your lead log and follow-up texts

I've watched trainers stand at the gym counter waiting for walk-ins, or for the manager to do the marketing. A no on the last visit is often a not yet, and without a log nobody follows up.

HOW TO DO IT

- 1 Make a spreadsheet with these columns: name and phone, goal, trial end date, last contact, next step.
- 2 Add every trial member on the day they start.
- 3 Send the same-day text after every offer. Follow up again a few days later, then a week after that.
- 4 Send the no-show text the same day someone misses.
- 5 Ask every new client who they'd like to bring along. Reward both of them with a free session, not a discount.

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

Log row: Dana, 555-0142 / Knee on stairs / Trial ends Friday / Offer and text Friday / Text again Monday

Same-day text: "Hey Dana, it's Maya from the gym. You went from a 20-second plank to 45 seconds this week. That's real. Your spot for Tuesdays is open till Friday. Want me to hold it?"

No-show text: "Missed you today, no stress. Want me to move you to Thursday at 6?"

Referral ask: "Who would you like to bring along? You'll both get a free session."

Your turn on the next page →

STEP 5 OF 5 · YOUR TURN

Set up your lead log and follow-up texts

Your lead log (start with every current trial member)

Name and phone	Goal	Trial end	Last contact	Next step

Your same-day offer text

Hey name, it's you from the gym. You went from first test to retest this week. That's real. Your spot for day is open till day. Want me to hold it?

Your no-show text

Missed you today, no stress. Want me to move you to day at time ?

Your referral ask at signup

Who would you like to bring along, first name ? If their friend's name signs up, you both get a free session.

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 every current trial member is in your log with a next step and a date.

THE PLAN

Your next 7 days

One small action a day. By day 7 every trial member is on your timeline.

ONE SMALL JOB A DAY

Day	Do this	Done	Notes
Day 1	Make your lead log spreadsheet and add every current trial member with a next step.	☐	
Day 2	Say your booking line out loud five times, then book a consult with the next trial member before they leave the front desk.	☐	
Day 3	Print five copies of your one-week starter plan and choose the day-one test for each member.	☐	
Day 4	Check attendance for every trial member and send the right check-in text the same day.	☐	
Day 5	Practice your price line out loud, then stay silent for ten seconds. Repeat until it feels normal.	☐	
Day 6	Run your five objection answers with a coworker or in the mirror.	☐	
Day 7	Send your same-day or follow-up text to every open lead, and ask your newest client who they'd like to bring along.	☐	