Standard Operating Procedure

On-Boarding New Clients at ZeroW

**Title**: Procedure for On-boarding New Clients

**Document Number**: SAL-PRO-001

**Version Number**: 0.1

**Date of Issue**: August 1st, 2024

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# Table of Contents

1. Purpose
2. Scope
3. Definitions
4. Responsibilities
5. Procedure
6. Materials and Equipment
7. Safety and Environmental Considerations
8. Quality Control
9. References
10. Appendices
11. Revision History
12. **Purpose**

To establish a consistent and high-quality on-boarding experience for new customers at ZeroW, ensuring their first 90 days are engaging, welcoming, and set the foundation for long-term client satisfaction and therefore membership.

By following this SOP, ZeroW ensures a consistent, welcoming, and high-quality experience for all new clients, laying a strong foundation for their long-term relationship with the gym.

1. **Scope**

This procedure applies to all staff members responsible for customer interactions, including but not limited to, front desk staff, coaches, and gym managers.

1. **Definitions**
   * **Prospective Client**: An individual visiting ZeroW for the first time.
   * **Current Client**: An individual who is already a member of ZeroW.
   * **On-boarding Period**: The initial 90 days from the date a new customer joins ZeroW.
2. **Responsibilities**
   * **Coaches**: Initial greeting, acknowledging new visitors, and managing walk-ins. Conducting consultations, engaging with new clients, and providing ongoing support.
   * **Gym Managers**: Overseeing the on-boarding process and ensuring all staff adhere to this SOP.
3. **Procedure**
   1. **Process flow chart**

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* Steps 5.1 – 5.6 are pre-sale, i.e occur before the new client signs on.
* Steps 5.7 – 5.9 refer to the first 90 days after sign-on, also referred to as hyper-care
  1. **Initial Greeting**
     1. **Acknowledgement within 30 Seconds:**
        + When a prospective client enters the gym, acknowledge their presence within 30 seconds.
        + This can be a wave, a verbal greeting, or a nod, ensuring they feel seen and welcomed.
        + Example: If you're busy, simply wave and say, "Hi, welcome! I'll be with you shortly."
     2. **Matching Energy and Stance:**
        + Stand up to greet the prospective client if you are sitting behind a desk.
        + Meet them at their level physically to facilitate an open and friendly conversation.
        + Example: If they are standing, stand to greet them. If they sit, sit with them.
     3. **Immediate Direction:**
        + If busy, inform the client of the wait time and what they can do in the meantime.
        + Example: "Hi, welcome! I'll be with you in 30 seconds. Feel free to look around."
  2. **Managing Walk-Ins**
     1. **Busy Situations:**
        + If engaged with a current client, politely ask for permission to speak to the new walk-in.
        + Example: "Excuse me for a moment, I need to greet a new visitor. I'll be right back."
        + Inform the walk-in of the current situation and arrange a follow-up time.
        + Example: "Hi, welcome! I'm currently with a client, but I'll be free in about 10 minutes. Can you wait, or should we schedule a time?"
     2. **Collecting Contact Information:**
        + Always get their contact details to ensure future communication.
        + Example: "Can I have your name, phone number, and email? I'll get in touch to arrange a convenient time."
        + Ensure that you prioritise contacting the Prospective Client.
     3. **Engagement Techniques:**
        + Ensure the prospective client knows you value their time.
        + Example: "I’ll be with my client for another 10 minutes. Please feel free to explore the gym, and I’ll join you shortly."
  3. **First Consultation**
     1. **Clarify Needs:**
        + Use the "CLOSE" framework to understand the prospective client’s goals.
        + **C** - Clarify: Gather information about why they are here. Everyone who walks through our doors does so because they have goals. It’s our job to help them achieve them.
        + Example: "What brought you to ZeroW? What are your fitness goals?"
        + **L** - Labelling: Assign a relatable label based on their goals.
        + Example: "It sounds like you're really committed to improving your strength."
        + **O** - Overview: Review their past experiences with strength training and gyms, and explain what ZeroW can offer.
        + Example: "Tell me about your previous gym experiences. What did you like or dislike?"
        + **S** - Sell the Dream: Highlight the positive outcomes they will achieve with ZeroW.
        + Example: "At ZeroW, you'll enjoy a supportive community and top-notch equipment."
        + **E** - Explain Away Concerns: Address any objections they may have.
        + Example: "I understand you're concerned about the cost, but think about the value you're getting."
     2. **Active Listening:**
        + Listen attentively and repeat back what they say to ensure understanding.
        + Example: "So you mentioned you want to lose weight and gain strength. Is that correct?"
     3. **Emotional Connection:**
        + Dig deeper to understand the emotional reasons behind their goals.
        + Example: "Why is getting stronger and losing weight important to you? How would achieving this goal impact your life?"
     4. **Confirm Understanding:**
        + Summarise their goals and confirm you’ve understood them correctly.
        + Example: "I hear you want to lose weight and gain strength because you want to feel healthier and more confident. Is that right?"
  4. **Selling the ZeroW Experience**
     1. **Sell the Dream:**
        + Focus on the benefits and positive outcomes they will achieve with ZeroW.
        + Example: "Imagine achieving your fitness goals with the support of a community that understands and motivates you."
     2. **Tailor the Presentation:**
        + Speak to what is important to them based on the consultation.
        + Example: "You mentioned you need guidance on proper technique. Our coaches will work closely with you to ensure you're lifting correctly and safely."
     3. **Highlight Unique Features:**
        + Emphasise what makes ZeroW unique compared to other gyms.
        + Example: "We offer personalised coaching, a strong community, and top-tier equipment designed specifically for strength training."
     4. **Price Presentation:**
        + Use price anchoring by presenting the highest membership option first.
        + Clearly and confidently present all options, ensuring the prospective client understands the value of each.
        + Example: "Our top membership is $179 per week, which includes two personal training sessions, unlimited gym access, and personalised programming. We also have options at $99 and $35 per week depending on your needs."
  5. **Post-Sale Follow-Up**
     1. **Immediate Reinforcement:**
        + Congratulate the new client on their decision immediately after they sign up.
        + **Example**: "Congratulations on joining ZeroW! You’ve made a great decision for your fitness journey."
        + Once membership is set up send an email to the new member with confirmation of details discussed and gym specific information ie door code.
        + Refer to Template-XXX
     2. **Next-Day Reinforcement:**
        + Send a follow-up message the next morning.
        + **Example**: "Good morning, [Client’s Name]. Just a reminder, you’ve made a great decision for your training. We’re excited to have you on board!"
  6. **Ensuring a Great First 90 Days**
     1. **Personalised On-boarding Plan:**
        + Develop a on-boarding plan based on the client’s goals and their membership tier.
        + Be conscious of the amount of time you invest in customisation for a customer based on membership tier.
        + **Example 1**: Standard membership, “Based on your goal to get stronger, here’s a training plan customised for your specific needs, based on one of the proven ZeroW templates”.
        + **Example 2**: Gold membership, "Based on your goal to lose weight, here’s a tailored 90-day plan including training sessions, nutrition guidance, and check-ins. Let’s talk through it, and if you have any questions please let me know so I can answer them"
     2. **Regular Check-Ins:**
        + Schedule regular check-ins to monitor progress and adjust the plan as needed.
        + In order to ensure that you consistently check in with your clients, use the calendar tool to schedule time for each client in hyper-care, and set it to push reminders to your phone.
        + Record the actions you took as well as other relevant information in the hyper-care spreadsheet (form-xxx)
        + **Example**: "We’ll have bi-weekly check-ins to track your progress and make any necessary adjustments. What time and day suits you best?"
     3. **Week-specific actions**
* **Week 1**: gym tour, set up program, introduction to other members
* **Week 2**: TBC
* **Week 3**: if you’re loving the gym, ask for a 5-star google review, and offer an incentive
* **Week 4**: sales opportunity - upsell nutrition, coaching online, one on one coaching and other ZeroW product offerings
* Weekly contact for the first month
* Bi-weekly thereafter for month 2
* One formal check-in for month 3
  + 1. **Community Integration:**
       - Encourage participation in gym events, classes, and social activities to build a sense of community.
       - **Example**: "We have a group deadlift training session on Friday evenings. It’s a great way to meet other members and stay motivated."
    2. **Feedback Collection:**
       - Collect feedback at the end of the first week, first month, and at the 90-day mark.
       - Record this feedback on the client feedback spreadsheet (form-XXX)
       - **Example**: "We’d love to hear about your experience so far. How can we make your journey even better?"
  1. **Post Hyper-Care**
     1. **Continuous Support:**
        + Provide ongoing support and encouragement to keep the client engaged and motivated.
        + **Example**: "You’re doing great! Keep pushing towards your goals, and remember, we’re here to support you every step of the way."
     2. **Up-selling**
* Once a client is on-boarded, review their progress over their first 3 months of training. Understand and explain the progress they’ve made towards achieving their original goal.
* Discuss how the client’s goals may have evolved or changed, and how ZeroW’s more premium offerings might suit their needs.
* **Example 1**: “you’ve made great progress towards achieving hour weight loss goals since you joined ZeroW. Would you be interested in nutrition coaching to help you make more progress towards your goals?”
* **Example 2**: “you’ve made great progress towards your goal of increasing your strength goals since you joined ZeroW. Would you be interested in personalised 1-on-1 coaching to help you make further progress towards your goals?”

1. **Materials & Equipment**

* Post -sale email template (template-xxx)
* Communications Guide (pro-xxx)
* Activity reminders using Google Calendar
* Hypercare spreadsheet (form-xxx)
* Client feedback spreadsheet (form-xxx)
* ZeroW training templates (xxx)

1. **Safety & Environmental Considerations**

* Gym tour and highlight emergency response plan.
* Assess any special needs that a new client has. Adapt training plan accordingly.
* Explain how to safely use gym equipment if required by client.
* Other safety requirements

1. **Quality Assurance**
   * **Feedback Collection**: Gather feedback from new clients at the end of their first week, first month, and at the 90-day mark.
   * Use this feedback to continuously improve the on-boarding process.
   * **Training and Reviews**: Regularly train staff on the SOP and review their performance to ensure compliance.
   * Conduct quarterly reviews of the on-boarding process and update the SOP as needed.
2. **Records & Documentation:**
   * Maintain records of all new client consultations and follow-ups.
   * Store feedback and improvement plans securely for quality assurance.
3. **References**
   * **Training Videos**: Refer to the recorded videos by Thomas for detailed insights and examples of ideal client interactions.
   * ZeroW Gym Safety Manual
   * ZeroW Website
4. **Appendices**
   * Appendix A: On-boarding Checklist
   * Appendix B: Technique Session Guide
   * Appendix C: Initial Assessment Form

### **Revision History**

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| **Version** | **Date** | **Description** | **Author** |
| 0.1 | July 22, 2024 | Draft | Michael Kingston |