

New Client Checklist

Paste Logo Here

Name _____

Done / Date			Notes
	Health History		
	Physicians Release		
	Lifestyle Evaluation		
	Policy and Procedure Sheet		
	Evaluation		
	Goal Sheet		
	Business Cards		
	Brochure		
	Health Club Membership (If Necessary)		
Follow-up Call	Date:		
	Any Questions?		
	When do you want to get started?		
First Workout follow-up	Date:		
	How do you feel?		
	Did you have any discomfort?		
	What exercises did you feel were the most challenging?		
	Which ones were the easiest for you?		
	Set up time for next appointment ☺		
	Anything else... Referrals...be tactful!		

Things to remember:

Be Brief...

Be Brilliant...

Be Gone...

A quick message, conversation, or note is better than a long drawn out speech. Let the client direct the conversation after you ask the first question.

Contact by the mode that your clients like...phone, text, email, smoke signal...whatever they like!