



## Initial Trainer Goal Setting Worksheet

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Establish challenging yet achievable Program and Product production goals for the first 30-90 days. After you feel comfortable with this simple Goal Setting process, progress to creating your Monthly Business Plan as described in the dotFIT Playbook.

### **Worksheet**

#### **Establish 90 day Program goals.**

Knowing that over 80% of all PT clients have goals that require the 24hr/day support the Me Program provides, we can set appropriate Program involvement goals.

**Current PT clients.** This goal is calculated by using a percentage of your current active client list. A healthy goal is 80% of current PT clients on a dotFIT Me Program, which may take you 2-4 weeks, depending upon how many clients you have and how often you see them. At least 50% of these clients should sign up for a paid subscription to benefit from the increased engagement, product discount offerings, and results that paid subscribers receive.

- For example, if you have 10 current PT clients:  $10 \times 80\% = 8$  clients on a Me Program. At least 4 (50%) of them should sign up for a paid subscription.
- Current Total PT clients: \_\_\_\_\_  $\times 80\% =$  \_\_\_\_\_ clients on a Me Program by \_\_\_\_\_ date (2-4 weeks from today).
- Multiply the above goal by 50% to determine the number of clients that will become a paid subscriber: \_\_\_\_\_
- *Note: If your club offers "Unlimited Subscriptions", or "Club-Sponsored Subscriptions", your Trainers should be expected to enroll 90-100% of their PT clients.*

**New PT clients.** After approximately 2 weeks of focusing on current PT clients, you should progress to enrolling new PT clients into the Me Program upon the purchase of a PT package. A healthy, ongoing goal is 50-80% of all new PT clients. At least 50% of these clients should sign up for a paid subscription to benefit from the increased engagement, product discount offerings, and results that paid subscribers receive.

- By the end of the 90 days, your goal should ramp up to 80-90+% of all PT clients on a Me Program.
- For example, if you sign up 5 new PT clients a month:  $5 \times 50-80\% = 3-4$  new PT clients on a Me Program. At least 2 (50%) of them should sign up for a paid subscription.



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- Average new PT clients per month: \_\_\_\_\_ x 50-80% = \_\_\_\_\_ new PT clients on a Me Program by \_\_\_\_\_ date (3-6 weeks from today).
- Multiply the above goal by 50% to determine the number of clients that will become a paid subscriber: \_\_\_\_\_
- You can check on your progress by using the Reports section of your online Trainer Console.
- *Note: If your club offers “Unlimited Subscriptions”, or “Club-Sponsored Subscriptions”, your Trainers should be expected to enroll 90-100% of their PT clients.*

### Establish 90 day Product goals.

Survey results tell us that approximately 70% of health club members and PT clients use at least one dietary supplement on a daily basis. Experts such as those at JAMA tell us that every adult should take a daily multivitamin, and study after study confirm that people who use one to two meal replacements per day are significantly more successful with achieving and maintaining weight loss. As their one-stop fitness resource, you and your club are the perfect resources to provide the solutions they need. With this information in hand, we can set appropriate Product production goals.

**Current PT clients.** This goal is calculated by using a percentage of your current active client list. A healthy goal is 60% of current PT clients making a monthly product purchase either in the club or online. Establishing an average purchase amount is as easy as determining what the average client needs; a dotFIT MV and either a box of meal replacement bars or a jug of meal replacement powder. This make the average product purchase amount \$50-\$65, which is the current national average for all clubs. For example, if a Trainer has 10 current PT clients:  $10 \times 60\% = 6$  clients making a product purchase. At \$50/purchase, the Trainer’s goal is \$300. At \$65/purchase, the Trainer’s goal is \$390.

- For example, if you have 10 current PT clients:  $10 \times 60\% = 6$  clients making a product purchase. At \$50/purchase, your product sales goal is \$300. At \$65/purchase, your goal would be \$390.
- Current Total PT clients: \_\_\_\_\_ x 60% = \_\_\_\_\_ clients making a product purchase by \_\_\_\_\_ date (2-4 weeks from today).
- Multiply the above goal by \$50-\$65 to determine your total product sales goal from current PT clients for the month: \_\_\_\_\_



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**New PT clients.** After approximately 2 weeks of focusing on current PT clients, you should progress to focusing on presenting appropriate dotFIT products to new PT clients. A healthy, ongoing goal is 40-80% of all new PT clients, each purchasing between \$50-\$65 each. The combination of current and new PT clients alone can quickly increase your Product production to more than \$500-\$750 per month within 90 days.

- For example, if you sign up 5 new PT clients each month:  $5 \times 60\% = 3$  clients making a product purchase. At \$50-\$65/purchase, your product sales goal from new PT clients is \$150 - \$195.
- Average new PT clients/month: \_\_\_\_\_ x 60% = \_\_\_\_\_ clients making a product purchase by \_\_\_\_\_ date (3-6 weeks from today).
- Multiply the above goal by \$50-\$65 to determine your total product sales goal from new PT clients for the month: \_\_\_\_\_
- Note: Use your club's Point-of-Sale or Inventory Management system to track in-club product sales by teaching the Front Desk staff to link all product purchases to the Trainer that worked with that client. As a Trainer, you should make sure that this happens consistently for your clients. Online product sales can be tracked in the Reports section of your online Trainer Console.

### Establish Commissions for staff.

Your Fitness Manager will share with you the commission structure for program and product sales generated. When they provide you with the percent commission you will receive for the sales your clients generate, simply complete the following formula to project what your monthly commission target is:

- Total Monthly Sales Target: \_\_\_\_\_ x Your commission % \_\_\_\_\_ = \_\_\_\_\_ Your target monthly commission

Just like investing, your monthly commission may seem small initially, but as each month compounds upon the previous, you will find that over the next 3-12 months, your monthly commission can grow to over \$200 - \$300 per month! This is a great way to make more money doing what you love, without relying solely on increasing your hourly rate, or the number of hours you work each week. Your commission is simply a reflection of the number of people you have serviced and continue to service over time.

***\*Very Important - Post It to Achieve It!***



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*Once you have established your specific, objective goals, and the reason(s) why you want to achieve them, post them where you and everyone responsible for the accomplishment of them can see it daily.*

Here is a simple, powerful, and proven strategy:

- Determine each person(s) goals and daily goal rate. (Total Sales Goal / Days in the Month = Daily Goal Rate)
- Each day, run a sales report and calculate everyone's current daily sales rate
- On a board in your Office, draw a horizontal line to represent the daily goal rate
  - Write the name(s) of those who are at or above their daily goal rate on that day above the line
  - Write the name(s) of those who below their daily goal rate on that day below the line
- Hold a 30-minute **daily** Staff Training Session, emphasizing role playing, presentations and application
  - Anyone whose name is above the line – attending Staff Training that day is optional
  - Anyone whose name is below the line – attending Staff Training that day is mandatory

This will help keep everyone focused and excited about what they are working towards each day.

Committing to this will make you and your team better than 99% of the competition!