

Evaluating Your Trainers for Optimum Performance

Retain staff through clear expectations and regular systems.

How do you maintain a team of trainers who are hardworking, client-focused, loyal and in sync with you and each other? Part of the answer lies in devising well-defined hiring and evaluation protocols and applying them consistently.

For over 14 years I have hired and reviewed employees, and 90% of the time it's been great. Here are the hiring and evaluation systems that have worked for me. See how you can adapt them for your own needs.

Implementing a Consistent Hiring Process

I consider hiring and training to actually be phase one of the evaluation process. How do I figure out the starting salaries of new trainers? The same way I decide on raises during review time—using a point system. I base this point system on personal qualities, education, hands-on experience, continuing education and overall productivity. Extra incentives, such as a 401k or continuing education reimbursement, do not kick in until trainers have been with my company for 1 year. I ask new trainers to complete an hours and compensation form based on our interviews so I know they are clear about the hours they will work and how much I will pay them.

Once I hire new trainers, they go through phase two. This phase is a rigor-

ous office training program that's a full workday long. They must observe 6–10 sessions of their new co-workers and train all of these trainers. (I have a staff of eight; you might need to adjust this process if you manage a larger organization.) Once the new hires have been through the office training and the observation and training hours, they have one last session with me and then they're ready to take on their own clientele. Assuming everything is going well, they know that we will meet in 3 months to evaluate performance, client satisfaction and feedback from co-workers. If they make it through the 3-month evaluation, they become official team players and are then in the maintenance phase, which is phase three.

Using a 3-Week Review Process

With the solid systems we have in place, every trainer knows what to expect at review time. I conduct annual reviews, usually in August. Typically our summers slow down, and I like to get my staff excited about our fall rush. The way I lay out my review system turns out to be about a 3-week process.

Week 1: Observation. During the first week, I observe each trainer with one client or sometimes more clients, depending on the trainer. For the detailed form I use, see "Personal Trainer Evaluation Form."

Week 2: Evaluation Forms. During the second week, I ask every trainer to evaluate both *my* performance and his own performance. (See "Trainer Self-Evaluation Form.") I then go through the client files to make sure documentation is up-to-date and clear, client retention is high and feedback from clients is positive. For client retention numbers, I track new clients each month and at the end of the year to see how many are still with each trainer and how many have left. I track cancellations as well. Low retention or high cancellation numbers are a red flag for me.

Week 3: Actual One-on-One Review. I put the information I have gathered from the first 2 weeks into the trainers' review files. I total the points based on observations, general performance questions and my survey of client files. From there, I refer back to the paperwork we filled out during hiring to help evaluate overall performance. Again, using my point system for evaluations will help determine the appropriate pay increase. How I pay my staff is determined by current market trends, and my pay raises average about 3%–5% annually.

One week after reviews, I enclose review confirmation forms along with payroll and ask the trainers to verify the changes made at their reviews. This process ensures that any pay changes, additional responsibilities and job updates

are clearly understood. Trainers sign and date the forms and return them to me within a week. I then put them in the employee files.

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Personal Trainer Evaluation Form

Evaluation for _____ Date _____

Client _____

Scoring: 1 represents "almost never," 5 is "almost always" and 2-4 are somewhere in between.

1. Guidance and Instruction

1. Does trainer clearly explain each exercise to be done and muscles involved?
Almost never 1 2 3 4 5 Almost always
2. Does trainer have control of session by keeping exercise instruction clear and fluid?
Almost never 1 2 3 4 5 Almost always
3. Does trainer stop client if exercise is done incorrectly?
Almost never 1 2 3 4 5 Almost always
4. Does trainer encourage client through positive feedback during exercise?
Almost never 1 2 3 4 5 Almost always
5. Does trainer ask for feedback from client following each exercise?
Almost never 1 2 3 4 5 Almost always

2. Client Form (as Cued by Trainer)

1. During exercise, does trainer make sure client's spine remains in neutral alignment?
Almost never 1 2 3 4 5 Almost always
2. Does trainer make sure client's head remains stable and eyes are open?
Almost never 1 2 3 4 5 Almost always
3. When appropriate, does trainer make sure client's knees remain slightly flexed while patella remains in alignment with 1st and 2nd toes?
Almost never 1 2 3 4 5 Almost always
4. When appropriate, does trainer make sure client's joints that are not part of directed motion remain stable while completing a full range of motion?
Almost never 1 2 3 4 5 Almost always
5. When appropriate, is gravity acting on resistance or is gravity redirected through use of cables, bands or tubing through a full range of motion?
Almost never 1 2 3 4 5 Almost always
6. When applicable, is movement slow, controlled and performed without momentum through concentric and eccentric range of motion?
Almost never 1 2 3 4 5 Almost always
7. When appropriate, does trainer ensure shoulders are retracted and chest is up?
Almost never 1 2 3 4 5 Almost always

3. General

1. Does trainer keep client motivated and on track with regular assessments and goal reviews?
Almost never 1 2 3 4 5 Almost always
2. Does trainer keep cancellations to a minimum?
Almost never 1 2 3 4 5 Almost always
3. Is trainer on time and well-prepared for sessions, making sure studio is clean and fully equipped before and after each session?
Almost never 1 2 3 4 5 Almost always
4. Is client retention and success consistently high?
Almost never 1 2 3 4 5 Almost always
5. Does trainer remain passionate about client success?
Almost never 1 2 3 4 5 Almost always
6. Does trainer attend regular staff meetings?
Almost never 1 2 3 4 5 Almost always
7. Is trainer consistent with completing schedule book and signing in clients?
Almost never 1 2 3 4 5 Almost always

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Personal Trainer Evaluation Form (continued)

8. Is trainer seeking improvement with regular continuing education?
Almost never 1 2 3 4 5 Almost always
9. Does trainer keep detailed documentation for each client?
Almost never 1 2 3 4 5 Almost always
10. Is trainer always dressed in uniform with neat, clean and fit appearance?
Almost never 1 2 3 4 5 Almost always
11. Is trainer familiar with retail merchandise and consistently promoting it to clientele?
Almost never 1 2 3 4 5 Almost always

Evaluation Point Results

1. Guidance and Instruction

| Poor | Below Average | Average | Above Average | Excellent |
|------|---------------|---------|---------------|-----------|
| <8 | 8-12 | 13-16 | 17-20 | >20 |

2. Form Instruction

| Poor | Below Average | Average | Above Average | Excellent |
|------|---------------|---------|---------------|-----------|
| <8 | 8-12 | 13-16 | 17-20 | >20 |

3. General Trainer Performance

| Poor | Below Average | Average | Above Average | Excellent |
|------|---------------|---------|---------------|-----------|
| <8 | 8-12 | 13-16 | 17-20 | >20 |

Total for Guidance and Instruction _____

Total for Form Instruction _____

Total for General Trainer Performance _____

Additional Comments: _____

Trainer Self-Evaluation Form

Evaluation for _____ Date _____

1. How many clients are you currently training?
2. Are you where you'd like to be with the number of sessions per week?
3. How successful have your clients been? Share (on back) a minimum of two client success stories.
4. How often do you perform assessments and goal-setting sessions? Do you feel this amount is adequate?
5. Do you feel your retention numbers are strong?
6. Do you feel you keep your client cancellations to a minimum?
7. Do you feel you bring 100% effort to each training session, or do you feel that could improve?
8. Do you feel you go above and beyond in your role with the organization?
9. Do you ask your clients for referrals?
10. Are you consistent with keeping your room clean and organized after each session?
11. On a scale of 1-10, where do you feel your performance level is?
12. Do you follow up with clients 3 months after their departure?
13. Do you regularly send out a minimum of three handwritten notes per month to clients?
14. Do you believe that your performance warrants a pay increase? Why?
15. Where do you see yourself in the next 3-6 months with the organization?