



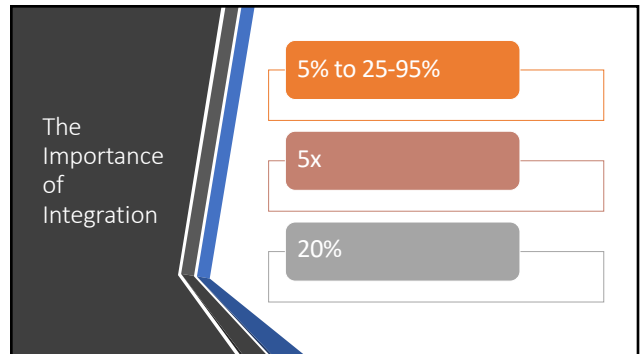
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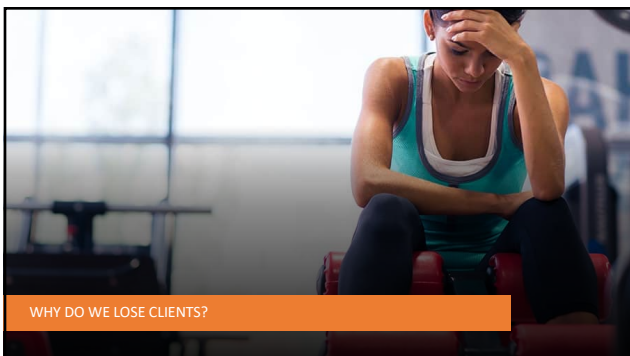
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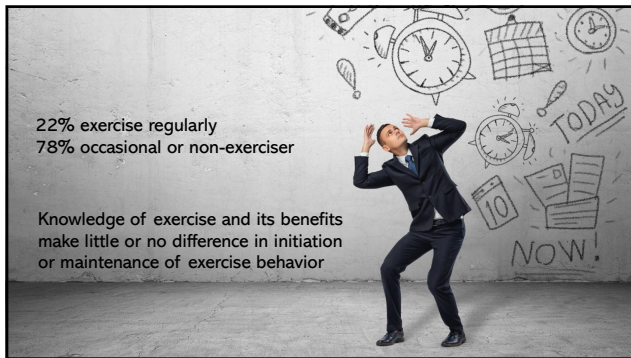
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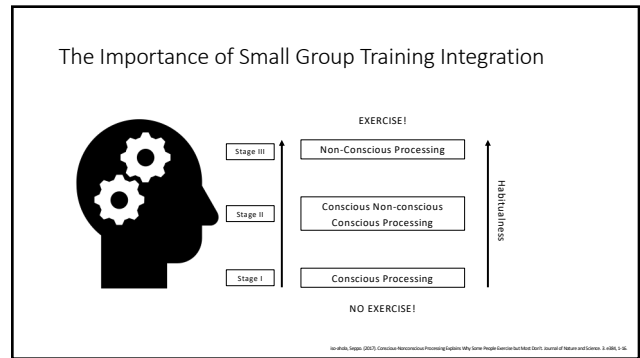
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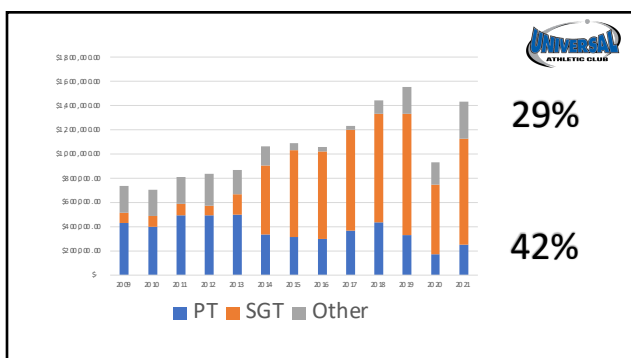
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Pre-Agreement	Agreement	Post-Agreement	Lost Client
Awareness Interest Research	Conversion	Customer Advocacy	Exit
Assess	Admit Affirm	Activate Acclimate Accomplish Adopt Advocate	
Attract	Convert	Manage Engage Delight	

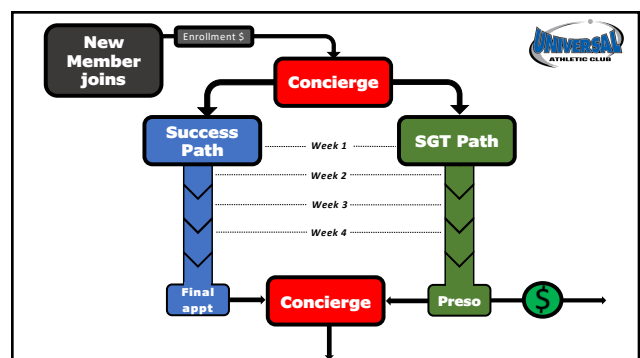
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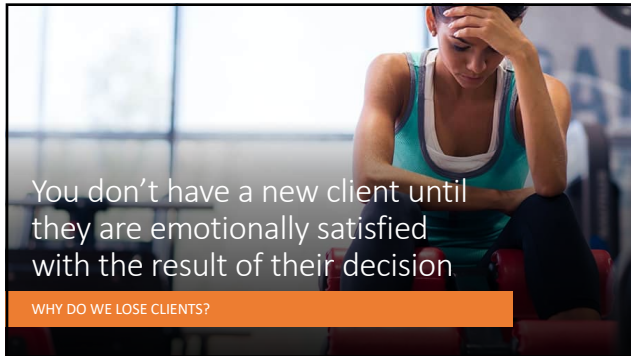
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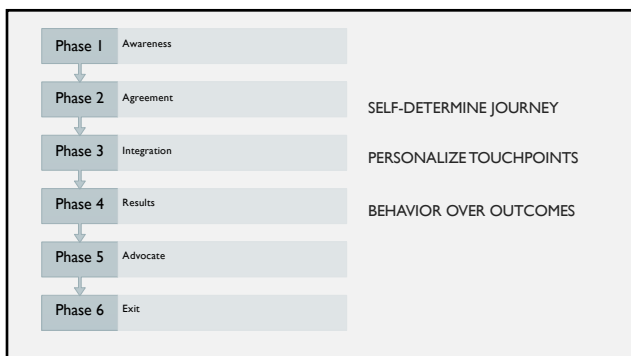
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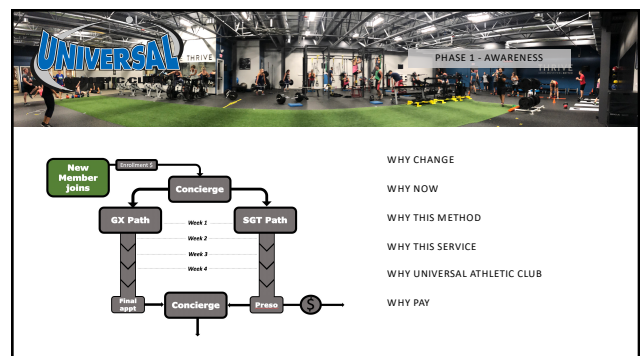
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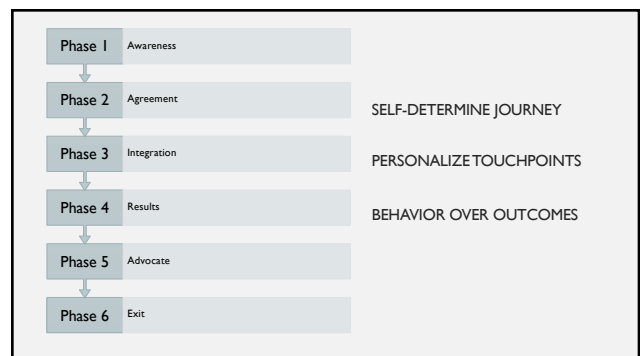
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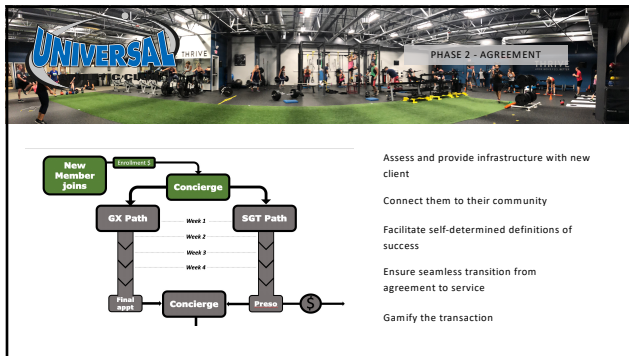
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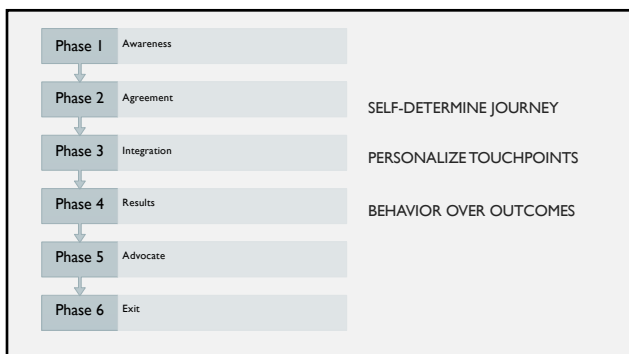
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**Phase 2- Agreement**

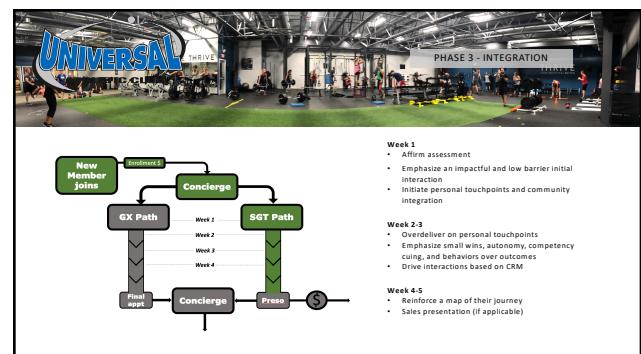
- Make the transaction legendary
- Deliver an immediate and relevant next step
- Show them how their life will now be different
- Connect them to their community to be
- Make a seamless transition from their decision to training
- Eliminate the "Quiet Zone"

*"This was the best decision I could make for myself"*

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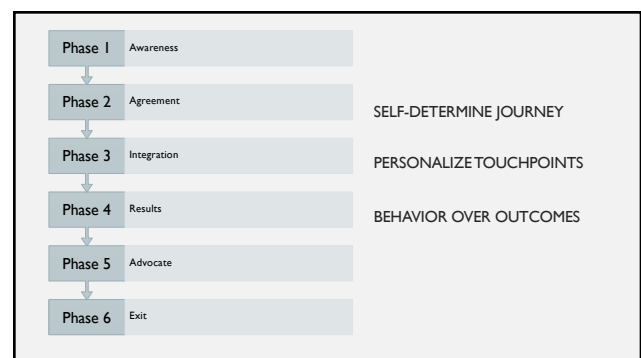
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**Phase 3 – Integration**

- Make the first interaction memorable, frictionless, and personal
- Keep client connected to their promised journey
- Lower the client learning curve
- Integrate into the community
- Use positive reinforcers of intrinsic motivators

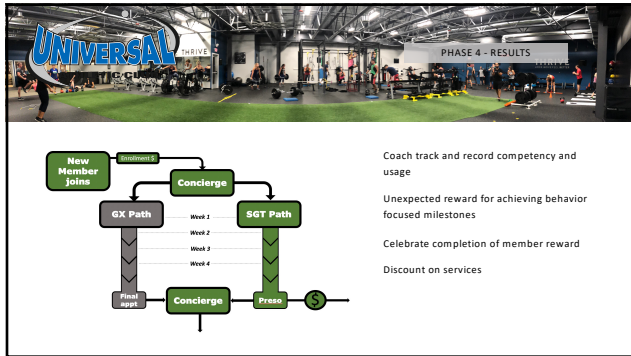
*"I'm confident in what I should be doing and why!"*

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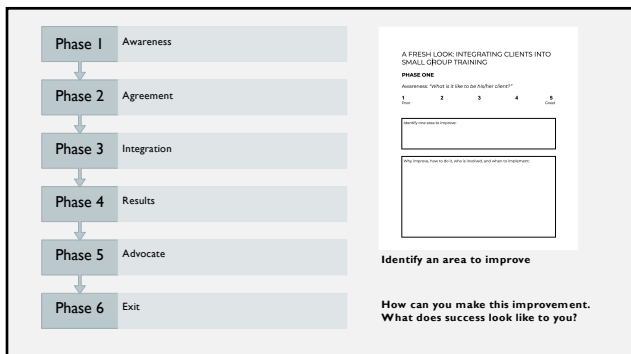




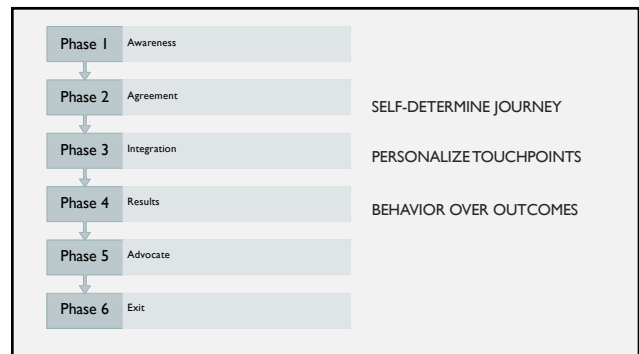
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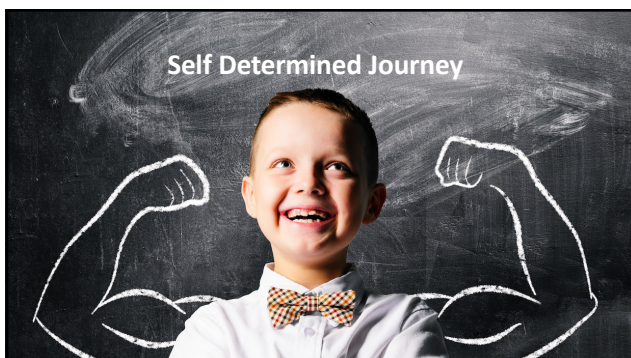
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## Self Determined Journey



**Intrinsic**

**Autonomy**  
**Give them a choice...**  
*Collaborate*  
*Negotiate and let them lead*  
*Ask for feedback*  
*Ask for permission*

**Competence**  
**Immediate gratification**  
*Celebrate small wins*  
*Emphasize external cues*  
*Coach permission to forgive*  
*Facilitate a reframing of success*

**Relatedness**  
**Feeling part of something**  
*Foster tribes and community*  
*Personalise touchpoints*  
*Connect people early in the journey*

Ryan R. Deci E (2000) *Intrinsic and Extrinsic Motivations: Classic Definitions and New Directions*. *Contemporary Educational Psychology* 25, 54-67

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## SELF-DETERMINE GOALS

- Identify each client's readiness to change behavior and stage of behavioral change
- Foster exercise adherence by creating positive exercise experiences that build self-efficacy
- Determine the need for, and appropriate selection and timing of, assessments and reassessments
- Design, lead, and modify exercise programs based on each client's current health and fitness status, needs and goals
- Foster a sense of self-reliance to empower clients to take ownership of their lifestyle changes
- Help clients transition from extrinsic motivation to intrinsic motivation
- Establish realistic short- and long-term goals to prevent burnout, provide multiple opportunities for success and promote adherence
- Factor a client's external lifestyle behavior stressors into total fatigue to avoid training plateaus and prevent overtraining

AMERICAN COUNCIL ON EXERCISE.

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## CONCIERGE INSIGHT



**GOALS**

- The highest volume of goals expressed are to improve overall health
- Noticing more new members "feeling depressed"
- Weight gain during shutdowns is a secondary concern
- Frequently down as their outdoor activity is limited due to weather timing
- Younger demographic with more balanced goals
- Not noticing as many resolutions as much as a relief to have a place to exercise
- Less than expected are expressing concerns about COVID-19

**GOAL SETTING**


- The member evaluates themselves. First 15 minutes is self-determination
- Why x3
- Reaffirm their goals and ask open ended questions on their feelings about them
- Always affirm with a solution
- 6 week Fit3D scans are often game changers

**INTEGRATION/ENGAGEMENT**

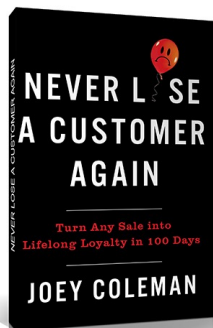
- Tailor the integration plan
- Always circle back the service to the goal/behavior
- Introduce staff/trainers who are part of their journey
- Carefully tracked member information for personalized follow ups between appointments
- Programming their integration through UAC fitness app
- Creating narratives why and how virtual offerings fit their lifestyle early is key. Build scenarios
- Best response and adherence with personal, unique, and "surprise" follow ups.

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## PERSONALIZE TOUCHPOINTS



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## PERSONALIZE TOUCHPOINTS

Create raving fans, early adopters, and powerful advocates by acknowledging clients personally and authentically

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## PERSONALIZE TOUCHPOINTS

**PT - New Client Track (Manual) Steps**


- > ☐ CC Wait 0 seconds from the last step and schedule
- > ☐ CC Wait 0 seconds from the last step and schedule
- > ☐ CC Wait 0 days from the last step and schedule
- > ☐ CC Wait 2 days from the last step and schedule
- > ☐ CC Wait 4 days from the last step and schedule
- > ☐ CC Wait 3 days from the last step and schedule
- > ☐ CC Wait 5 days from the last step and schedule
- > ☐ CC Wait 7 days from the last step and schedule
- > ☐ CC Wait 30 days from the last step and schedule

Close

- CRM guided touchpoints
- Blend of automated and task based
- Work closely with team for "surprise" touchpoints
- Keep task-based touchpoints unique and relevant


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### PERSONALIZE TOUCHPOINTS



1. Immediate personal welcome text
2. Immediate "What to expect email" and buddy pass
3. Phone confirmation of first service
4. Week 1 buddy pass text
5. Minimum 4 weeks text/email appointment confirmation
6. Week 2 phone check in
7. Week 3 feedback
8. Week 8 feedback

- Weekly coach one on ones to plan personalized touchpoint and build CRM notes for conversions




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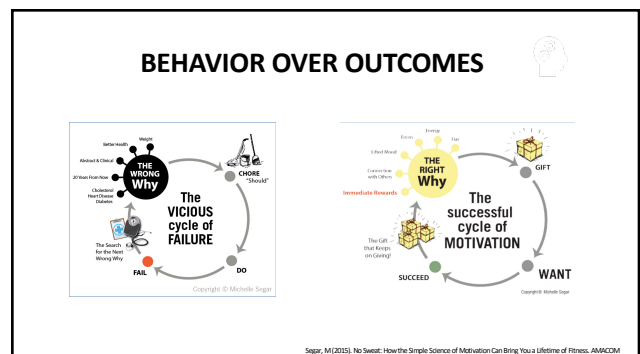
### BEHAVIOR OVER OUTCOMES

- Shift the conscious choice to move as a GIFT vs a CHORE
- Movement selection should be triggered by autonomy
- "Reward Substitution" – Change your reward/goal from the long-term extrinsic outcome to recognizable short-term outcomes with immediate gratification.
- Regularly embrace, gamify, forgive, and "treasure hunt" opportunities to move.
- Client/Member must give themselves permission for self-care.




Segar, M (2015). No Sweat: How the Simple Science of Motivation Can Bring You a Lifetime of Fitness. AMACOM

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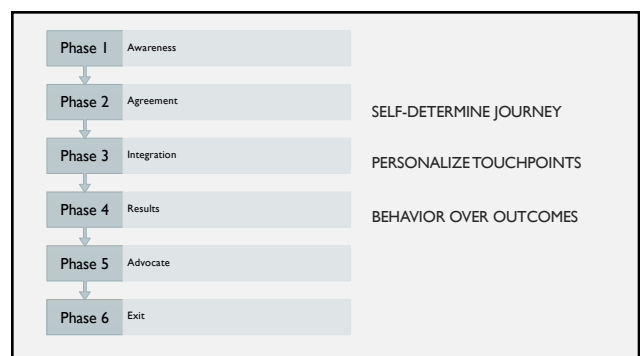
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### Keys for Small Group Training Coaches

1. Facilitate the mindset toward a behavior change over the long-term outcome.
2. The behavior change leads to the "right WHY"
3. Understand intrinsic motivators and facilitate this as a priority in assessments, in session, and with follow ups.

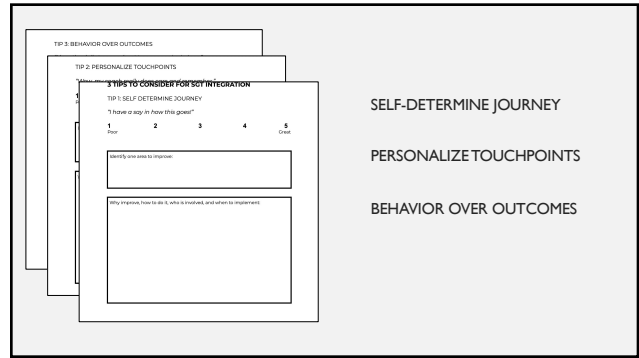
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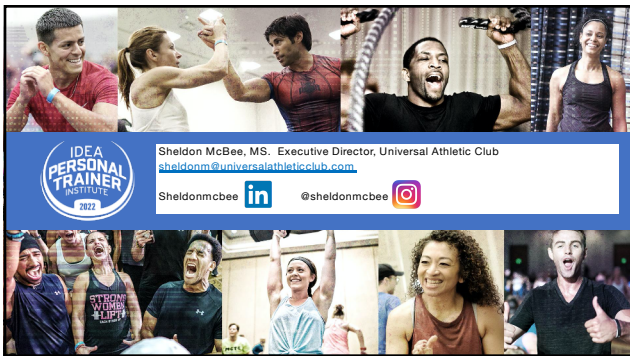
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# A FRESH LOOK: INTEGRATING CLIENTS INTO SMALL GROUP TRAINING

## PHASE ONE

Awareness: *"What is it like to be his/her client?"*

**1**

Poor

**2**

**3**

**4**

**5**

Great

Identify one area to improve:

Why improve, how to do it, who is involved, and when to implement:

## PHASE TWO

Agreement: *"This was the best decision I could make for myself"*

**1**

Poor

**2**

**3**

**4**

**5**

Great

Identify one area to improve:

Why improve, how to do it, who is involved, and when to implement:

## PHASE THREE

Integration: *"I'm confident in what I should be doing and why!"*

**1**

Poor

**2**

**3**

**4**

**5**

Great

Identify one area to improve:

Why improve, how to do it, who is involved, and when to implement:

## PHASE FOUR

Results: *"They remember what's important and care about my personal needs"*

**1**

Poor

**2**

**3**

**4**

**5**

Great

Identify one area to improve:

Why improve, how to do it, who is involved, and when to implement:



### 3 TIPS TO CONSIDER FOR SGT INTEGRATION

#### TIP 1: SELF DETERMINE JOURNEY

*"I have a say in how this goes!"*

**1**

Poor

**2**

**3**

**4**

**5**

Great

Identify one area to improve:

Why improve, how to do it, who is involved, and when to implement:

## TIP 2: PERSONALIZE TOUCHPOINTS

*“Wow, my coach really does care and remember.”*

**1**

Poor

**2**

**3**

**4**

**5**

Great

Identify one area to improve:

Why improve, how to do it, who is involved, and when to implement:

### TIP 3: BEHAVIOR OVER OUTCOMES

*"I love the daily treasure hunt to any exercise in I can"*

**1**

Poor

**2**

**3**

**4**

**5**

Great

Identify one area to improve:

Why improve, how to do it, who is involved, and when to implement:

**Identify 2 areas to improve over the next 3 to 6 months:**

**How will you execute this?**

**Make notes with your team on key deliverables**

Awareness:

Agreement:

Integration:

Results:

3 tips

Self-determine journey, personal touchpoints, behavior over outcomes:



