Coach Member Follow Up SOP and Best Practices

For: Coaches
Purpose: Consistently follow up with active members to support goals and convert to personal training with a soft, supportive sales approach.

Objective

To help members stay consistent, feel supported, and understand the value of coaching while creating a clear, respectful path to starting personal training.

Reports to Follow Up With:

Week 1: New member orientation report - no FC scheduled

Week 2: PT orientation report - did an FC but has not been active in the gym the last 3 months

Week 3: Package sales summary and Active member report - former training clients that have been out of a training agreement for over 3 months or active members that have not been in the gym within the last 6 months or longer

Week 4: FC Follow Up tracker - manually check the FC follow up tracker to keep members in a call cadence

Helpful Phone Call Tips:

- Frame every call as a genuine check in. We want our members to be successful.
- Keep the tone supportive and focus on how you can help them.
- Connect your service to their desired outcome.
- Give a concrete offer or choice close when the opportunity arises.
- Respect the member’s choice. If they decline, be polite and leave the door open for future connections.

Helpful Messaging Tips:

- Use the AF Coaching Dashboard for follow up messages
- Know how to assign members to yourself as a “client”
- Create a group of “non paying clients” and “paying clients”
- Use the Monthly Touchpoint Calendar to send messages to your clients
- Know the monthly specials and offer a free training session or class once a month