A PRACTICAL GUIDE

The Personal Trainer's Assessment Pack

A step-by-step guide for intake, baseline testing, program review and instant PDF delivery

Made by the Braxis machine

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ABOUT THIS GUIDE

What this is

This guide is for independent personal trainers.

It is a practical method, not a promise of a result. It contains no invented statistics, no fake customers, and no guarantees. The words were drafted with AI assistance.

Use the checklist at the end on a real piece of work this week.

1. Structured Client Intake

Begin every new client relationship with a standardized intake form that captures health history, goals, activity preferences, and scheduling constraints. Use a digital questionnaire that can be completed on a tablet or sent via email before the first session. Review the responses yourself, highlight any red flags such as chronic conditions or medication use, and follow up with a brief phone call to clarify details. Record the final intake in a secure client management system, tagging each entry with the client’s name, start date, and primary goal. This creates a consistent baseline for future reference and ensures you have all necessary information before designing a program.

2. Baseline Fitness Assessments

Conduct a concise, repeatable assessment that covers strength, mobility, cardiovascular capacity, and body composition. Choose three core lifts (e.g., squat, push-up, deadlift) and record the maximum weight or repetitions the client can perform with proper form. Add a 3-minute step test or a sub-max treadmill test for cardio, and use a tape measure or skinfold calipers for body composition. Document each metric in a spreadsheet with columns for date, score, and notes on technique or effort level. Repeat the same protocol every 4–6 weeks to track progress objectively.

3. Program Design and Documentation

Translate the intake goals and baseline data into a periodized program that outlines weekly workouts, exercise selection, sets, reps, and progression cues. Use a template that includes a client overview, training objectives, and a calendar view of each session. Save the program as a PDF and attach it to the client’s file. Provide a brief written rationale for the chosen structure so the client understands why each component matters. Keep the template editable so you can quickly adjust variables for future clients without recreating the entire document.

4. Review Sessions and Adjustments

Schedule a formal review every 4–6 weeks, coinciding with the reassessment date. Compare the new assessment results to the baseline and note any gaps between expected and actual progress. Discuss these findings with the client, asking for feedback on perceived difficulty, enjoyment, and any emerging goals. Update the program by modifying load, volume, or exercise selection based on the data and client input. Record the revised program and the rationale for changes in the same PDF format used previously, maintaining a clear version history.

5. Instant PDF Delivery and Automation

Set up a simple workflow using a cloud-based document generator or a PDF creation tool that pulls data from your client management spreadsheet. Create a button or shortcut that, when clicked, compiles the intake, assessment results, and program into a single PDF file. Configure an automated email template that attaches the PDF and includes a brief personalized note. Test the process with a dummy client to ensure the PDF renders correctly and the email sends instantly. Once verified, you can deliver the completed assessment pack to any new client within minutes of their first session.

USE THIS

Checklist

- [ ] Complete a digital intake form before the first session
- [ ] Perform a standardized baseline assessment and record results
- [ ] Create a periodized program using a reusable PDF template
- [ ] Conduct a progress review every 4–6 weeks and update the program
- [ ] Automate PDF generation and email delivery for instant client access

Where this came from

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