HOW TO GET STARTED

WITH COACHRX

Your Complete Guide to **Building a Premium Coaching Practice** That Serves More Clients Without Sacrificing Quality

This comprehensive blueprint reveals the exact systems professional coaches use to design better programs faster, deepen client relationships, and build sustainable practices that honor the craft of coaching.

Inside this free guide:

✓ **The 9-Step Professional Coaching Framework** — From assessment to program design to ongoing optimization

✓ **Program Design Systems** — Exercise, nutrition, and lifestyle integration that creates lasting client results

✓ **Relationship-Centered Communication Systems** — Build deeper connections that improve retention and referrals

✓ **Business Systems That Scale** — Professionalize your service delivery without losing the personal touch

✓ **Complete CoachRx Platform Access** — 14-day free trial to implement these systems immediately

Plus: Exclusive access to our Professional Coach Transition Checklist and 1:1 platform demo with our coaching team.

Introduction

Introduction

Welcome to **CoachRx,** your all-in-one coaching solution designed to help you seamlessly manage both your clients' fitness AND the health of your coaching business in one powerful platform.

This comprehensive guide will walk you through every feature of CoachRx, from basic setup to advanced business management, ensuring you're equipped to deliver exceptional coaching experiences while growing your business efficiently.

Whether you're a solo coach or managing a team, CoachRx provides the tools you need to create personalized training programs, track client progress, automate administrative tasks, and streamline your entire coaching workflow.

Pro Tip: Take your time going through each section of this manual. You don't need to implement everything at once! Start with our Quick Start guide, get comfortable with those features, and gradually introduce more advanced functions into your workflow.

Choosing Your Setup Path

When starting with **CoachRx**, you have two potential paths for getting your coaching business set up in the platform:

Path 1: Comprehensive Setup (Recommended)

➔ **Best for:** Coaches who want to build a sustainable, efficient coaching system from day one.
➔ **Time investment:** approx. 2-4 hours of initial setup time

Benefits:

- Creates a complete coaching system that scales as your business grows
- Establishes efficient workflows that save hours every week
- Provides professional, consistent client experiences
- Minimizes "reinventing the wheel" with each new client
- Sets up the full business infrastructure (payments, contracts, etc.)

The Comprehensive Setup includes:

- Complete business profile configuration
- Exercise and resource library setup
- Dashboard Overview
- Client management systems
- Assessment protocols
- Program design templates
- Lifestyle prescription frameworks
- Consultation structures
- Business suite integration

BEGIN COMPREHENSIVE SETUP

Path 2: Quick Start

➔ **Best for:** Coaches who need to onboard clients and start programming immediately.
➔ **Time investment:** approx. 15-30 minutes of initial setup time

Benefits:

- Get clients into the platform quickly
- Begin designing programs right away
- Focus only on essential functions initially
- Add more complex features gradually over time

The Quick Start focuses on:

- Basic account setup
- Adding clients
- Essential client data collection
- Core program design functions
- Basic lifestyle prescriptions

Pro Tip: If possible, choose the Comprehensive Setup path. Investing a few hours upfront will save you countless hours in the future and create a more professional experience for your clients. However, if you're in a time crunch, the Quick Start path will get you up and running, and you can always circle back to complete the comprehensive setup later.

BEGIN QUICK START

🎥 Video: Choosing Your Setup Path

Getting Help

If you need additional assistance:

1. **Help Center**
   - Access our comprehensive Help Center
     i. Search for specific features and troubleshooting guides
2. **Video Resources**
   - Access our full Video Hub
     i. Follow along with guided demonstrations
3. **Support Team**
   - Contact our dedicated support team at coachrxsupport@opexfit.com
   - Schedule a 1:1 onboarding session for personalized guidance

Final Thoughts

CoachRx was built by coaches, for coaches. We understand the unique challenges of balancing your passion for helping clients with the practical aspects of running a sustainable coaching business. This platform is designed to help you deliver exceptional fitness and lifestyle coaching while streamlining the administrative side of your practice.

Remember that mastering CoachRx is a journey. Start with the essentials, gradually implement more advanced features, and continuously refine your systems. Over time, you'll develop a coaching workflow that allows you to maximize client results while maintaining a healthy work-life balance.

Thank you for choosing CoachRx as your coaching platform. We're excited to be part of your coaching journey!

CoachRx User Manual

Comprehensive Setup Guide

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Setting Up Your Coach Profile

Setting Up Your Coach Profile

Your Coach Profile is the foundation of your CoachRx account and the control center for how the platform operates within your unique coaching business. Taking time to properly configure these settings ensures the platform is customized to your specific coaching style and business needs, creating a more efficient workflow and professional experience for both you and your clients. These settings also establish the baseline standards that will scale with your business as you add clients and potentially team members.

Consultation Link

The consultation link integration transforms how clients book time with you, eliminating the back-and-forth messaging that typically accompanies scheduling while demonstrating your professional systems. This seamless booking experience reduces friction in the client relationship and ensures consistent consultation cadence that's crucial for coaching success.

Add your personal scheduling link (from *Calendly*, *Acuity*, or your preferred scheduling tool) to make it easy for clients to book consultations directly through the CoachRx app:

1. Navigate to **Settings** > **Consultation Link** to access the scheduling integration
2. **Enter your *booking URL*** in the designated field - this should be the direct link to your scheduling system
3. **Save your changes** to activate the integration

Your clients will now see this link prominently displayed in their mobile app under their account section, allowing them to book consultations without leaving CoachRx. This integration maintains the professional coaching experience while leveraging your existing scheduling tools and processes.

Organization Settings

These settings establish your professional brand within CoachRx and ensure all client-facing materials reflect your business identity. Proper branding creates trust and reinforces your professional image with every client interaction, from contracts and waivers to custom client reports.

Customize your CoachRx account with your business information:

1. Navigate to **Settings > Organization** to access branding and business configuration
2. **Add your business name exactly as you want it to appear** on all client-facing materials
3. **Upload your logo** (recommended size: 250x250px) for consistent branding across reports, contracts, and client communications
4. **Add your website URL** to provide clients with easy access to your broader business presence
5. **Configure your touchpoint minimum** (recommended: 1-3 touchpoints per client per week) to establish communication standards
6. **Add footer information** for contracts and waivers including contact information, business address, or legal disclaimers
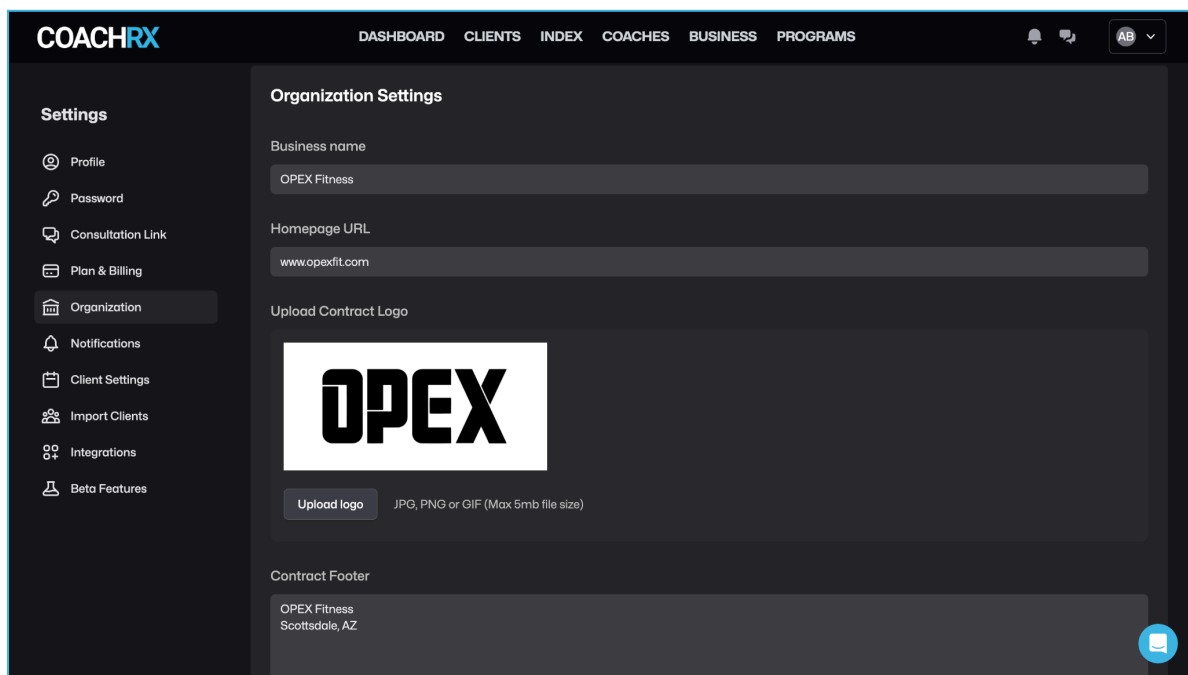
If you manage a team of coaches, these organization settings will apply to everyone in your organization, ensuring consistent branding and communication standards across all client interactions regardless of which coach they work with.

Notification Preferences

Strategic notification management prevents information overload while ensuring you never miss critical client communications or business opportunities. Properly configured notifications help you maintain responsive client service without being constantly interrupted during focused work periods.

Tailor your notifications to match your workflow:

1. **Navigate to Settings > Notifications** to access comprehensive notification controls
2. **Select which actions trigger notifications** based on your coaching priorities:
    - Client workout completions for immediate engagement opportunities
    - New client messages for responsive communication
    - Payment confirmations for business tracking
    - Assessment submissions for program planning
3. **Choose your notification delivery preferences** (email, in-app, mobile) based on how you prefer to receive different types of information
4. **Set quiet hours** if desired to maintain work-life boundaries while still staying connected to urgent client needs

This granular control ensures you're informed about what matters most while avoiding notification fatigue that can reduce your responsiveness to truly important communications.

Client Settings

These settings establish default parameters for your coaching relationships, ensuring consistent service delivery while accommodating your personal coaching style and capacity. Properly configured client settings help manage expectations and create sustainable coaching practices.

Configure default settings for your client relationships:

1. **Navigate to Settings > Client Settings** to establish coaching relationship defaults
2. **Set your personal touchpoint goal** (cannot be lower than organization minimum) based on your coaching capacity and service level commitments
3. **Adjust how far in advance clients can view their training schedule** to match your programming timeline and client preferences:
    - Limited view (1-3 days) for clients who get overwhelmed by seeing too much ahead
    - Extended view (1-2 weeks) for planners who like to see their full training week
    - Full visibility for clients who prefer maximum transparency and planning capability
4. **Customize dashboard exercise due settings** to align with your programming schedule and client communication preferences

Strategic Profile Configuration Tips

For Solo Coaches:

- Set touchpoint goals based on your realistic capacity and service promises
- Configure notifications to support your preferred communication rhythm
- Use client visibility settings to match your programming style

For Team Organizations:

- Establish organization-wide standards that all coaches can realistically maintain
- Use consistent branding to create unified client experience
- Set communication minimums that ensure no client feels neglected

For Growing Businesses:

- Start with conservative settings that you can easily exceed rather than unrealistic standards
- Plan notification preferences that will scale as your client base grows
- Consider how settings will work when you add team members or additional services

These profile settings create the foundation for efficient, professional coaching that scales with your business growth while maintaining the personal touch that drives client success and retention.

Pro Tip: Consider carefully how far in advance clients can see their workouts. Some clients perform better seeing only 1-2 days ahead (focusing on the present), while others need to see their full week to plan effectively.

🎥 Video: Optimizing Your Coach Profile

Building
Your Index

Building Your Index

The Index is the hub of your coaching business, a centralized library of templates, programs, and resources that can be assigned to any client. Investing time to build your Index will dramatically reduce your future workload.

Exercises

Your exercise library is the foundation of efficient program design. CoachRx comes pre-loaded with 1800+ professionally-produced exercise videos organized by movement patterns (bend, squat, lunge, push, pull, core, cyclical, and mobility) to get you started. This comprehensive library eliminates the need to search for exercise demonstrations or create your own videos for basic movements. When you add exercises to workouts, clients automatically receive clear video demonstrations in their mobile app, ensuring proper form and reducing the need for lengthy written explanations.

You can also add your own exercises to customize your library:

1. From the Index section, click **"Exercises"**
2. Click **"Add Exercise"**
3. Add a YouTube or Vimeo link
4. Fill out all relevant information including movement pattern, equipment needed, and coaching cues
5. **Save** the exercise to your library

You can also *"quick add"* exercises while designing a workout by typing the name and clicking the 🎥 icon to add a link.
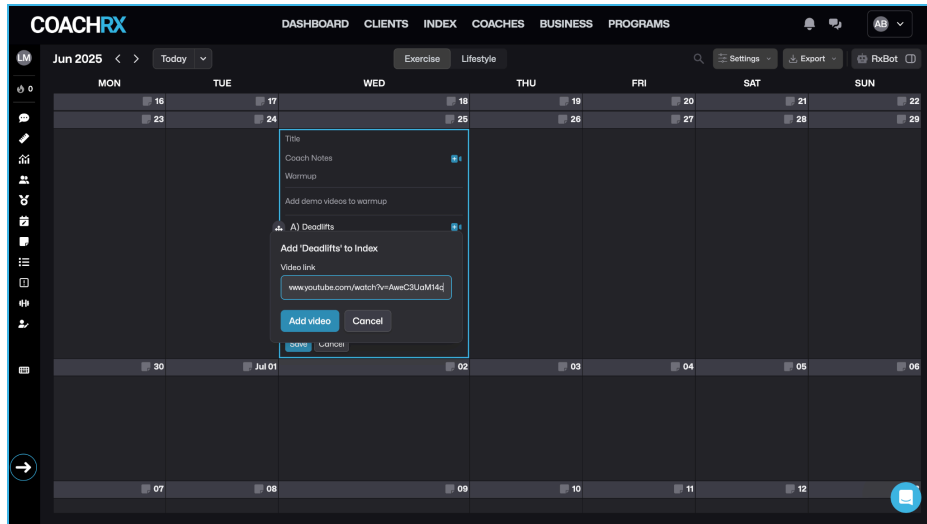
Warmups & Cooldowns

Rather than recreating warmups and cooldowns for every client session, the Warmups & Cooldowns library allows you to build a collection of standardized sequences that can be reused across your client base. This feature dramatically reduces programming time while ensuring your clients receive appropriate preparation and recovery protocols. You can create different warmup variations for specific training focuses (upper body, lower body, mobility-focused, etc.) and assign them based on the day's workout requirements.

Create standardized warmup and cooldown sequences to save time in your programming:

1. Navigate to **Index > Warmups** (or Cooldowns)
2. Click **"Add Warmup"**
3. Name your warmup clearly (e.g., "Upper Body - Pull Focus" or "General Movement Prep")
4. **Add instructions and exercise links** with specific rep counts and timing
5. **Save** to your library

Once saved, these can be quickly added to any workout including program templates.
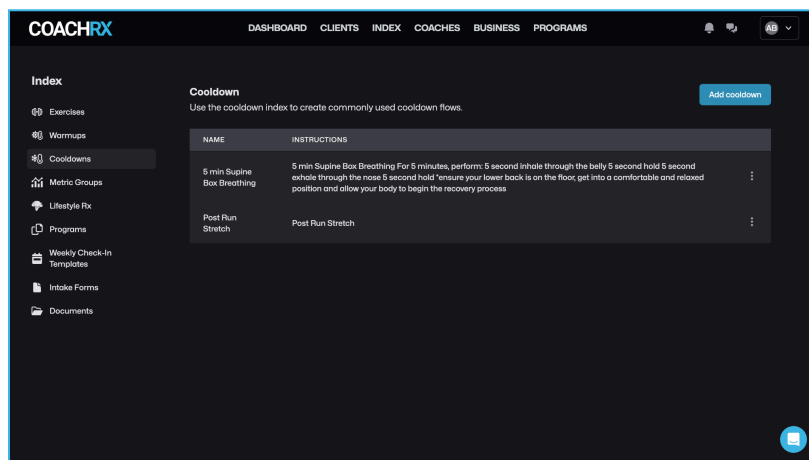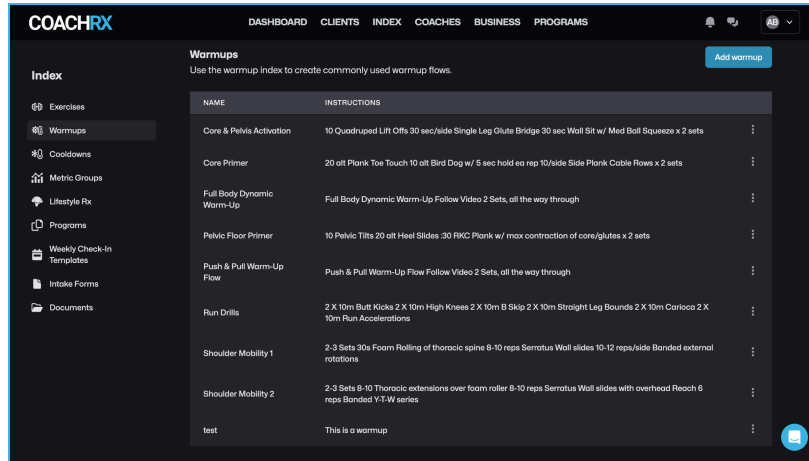
Lifestyle Types

The Lifestyle Types library is where CoachRx's habit-based coaching approach really shines. Rather than prescribing complex meal plans or overwhelming lifestyle overhauls, this feature allows you to create simple, trackable behaviors that clients can build into sustainable habits. The library comes pre-loaded with OPEX Basic Lifestyle Guidelines (sleep, hydration, movement, nutrition fundamentals), but you can customize these or create entirely new lifestyle prescriptions tailored to your coaching philosophy and client needs.

You can also add your own habit-based prescriptions to customize your library:

1. Navigate to **Index > Lifestyle**
2. Use the default Lifestyle types or create your own
   - *Note:* Default Lifestyle Types provided by CoachRx cannot be deleted
3. Click **"Add Lifestyle Type"**
4. **Name your lifestyle type** and **add corresponding prescriptions** with clear, actionable instructions
5. **Set tracking parameters** (yes/no, scale rating, specific measurements, etc.)
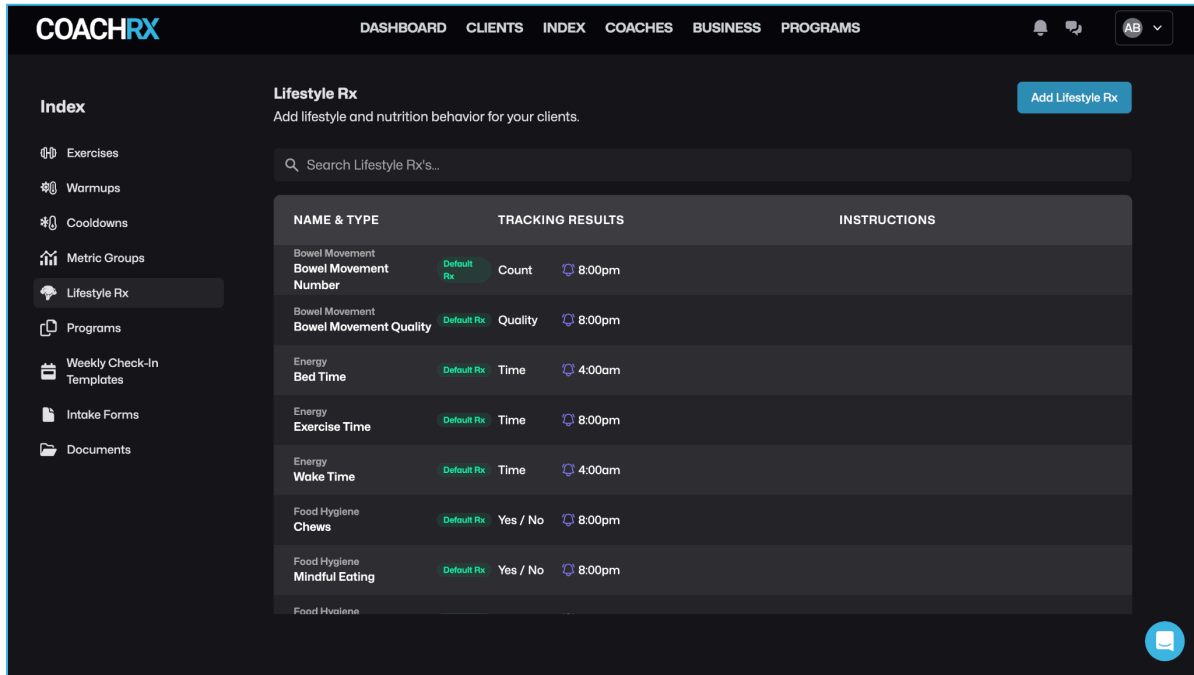
Metrics

The Metrics section allows you to create custom assessment protocols and fitness monitoring exercises (FMEs) beyond the standard OPEX assessments. This is particularly valuable for coaches who have specific testing protocols they use with certain populations, sport-specific assessments, or unique progress tracking methods. You can create metric groups for different purposes - strength baselines, cardiovascular benchmarks, sport-specific tests, or movement quality assessments - and track progress over time with visual graphs.

Create custom assessment protocols and tests in the Metrics section:

1. Navigate to **Index > Metrics**
2. Click **"Add Metric Group"**
3. **Name your group descriptively** (e.g., "Strength Baselines," "Running Performance," "Movement Quality")
4. **Add specific metrics** and units of measurement
5. **Assign metric groups** to relevant clients

These custom metrics integrate seamlessly with the client calendar, allowing you to link workout exercises to specific metrics for automatic data population and progress tracking.

Programs

The Programs feature allows you to create template programs that can be used with multiple clients, sold through your storefront, or used as inspiration for your program design. CoachRx offers two types of programs to fit different coaching models and business needs.

Program Types:

Standard Programs - Programs not tied to specific calendar dates. These are designed to run for a set number of days and end when completed. Perfect for:

- Fixed-duration training blocks (e.g., "8-Week Strength Builder")
- Specialized programs with defined endpoints
- Programs where clients can start at any time

Live Programs - Programs tied to specific calendar dates where all assigned clients follow the same schedule. These are ongoing programs with no defined end date. Ideal for:

- Group fitness or "workout of the day" style programming
- Seasonal training programs
- Community-based coaching where clients train together

Creating Programs:

1. Navigate to **Index > Programs**
2. Click **"Add Program"**
3. **Enter program name and description**
4. **Choose** Standard or Live program type
5. **Design** your complete program
6. **Save** to make available for assignment or sale

Assigning Programs:

- **Standard Programs:** Choose a start date and decide whether to sync changes (updates to the program will apply to currently enrolled clients)
- **Live Programs:** Simply assign clients to the program - they'll automatically receive whatever you design on the live calendar

Using Programs in Your Business:

- **Client Assignment:** Assign programs directly to individual or multiple clients from their calendars
- **Storefront Sales:** Sell programs online through your CoachRx storefront for passive income
- **Efficiency Tool:** Use programs to deliver consistent, proven training protocols to multiple clients simultaneously

CoachRx Program Templates: Access our library of expert-designed program templates created by top coaches to:

- Learn from proven program design principles
- See how experienced coaches structure progressions
- Use as inspiration for your own program development
- Study different approaches to strength, hypertrophy, and energy system development

Weekly Check-In Templates

Consistent communication and feedback are essential for tracking client progress beyond their workouts. Weekly check-ins provide structured touchpoints that help you monitor lifestyle factors, training satisfaction, energy levels, and potential issues before they become problems. Rather than relying on sporadic client messages, these templates create a predictable feedback loop that keeps you informed about your clients' week-to-week experience. You can customize questions to align with your coaching priorities - whether you focus heavily on sleep and stress management, nutrition compliance, or training motivation.

Create consistent feedback systems with custom check-in forms:

1. Navigate to **Index > Weekly Check-In Templates**
2. Use the default template or create your own
3. **Add questions with text**, rating (1-5 scale), or yes/no answers
4. Include questions about sleep, energy, nutrition, training satisfaction, and any specific metrics important to your coaching approach
5. **Save** your template
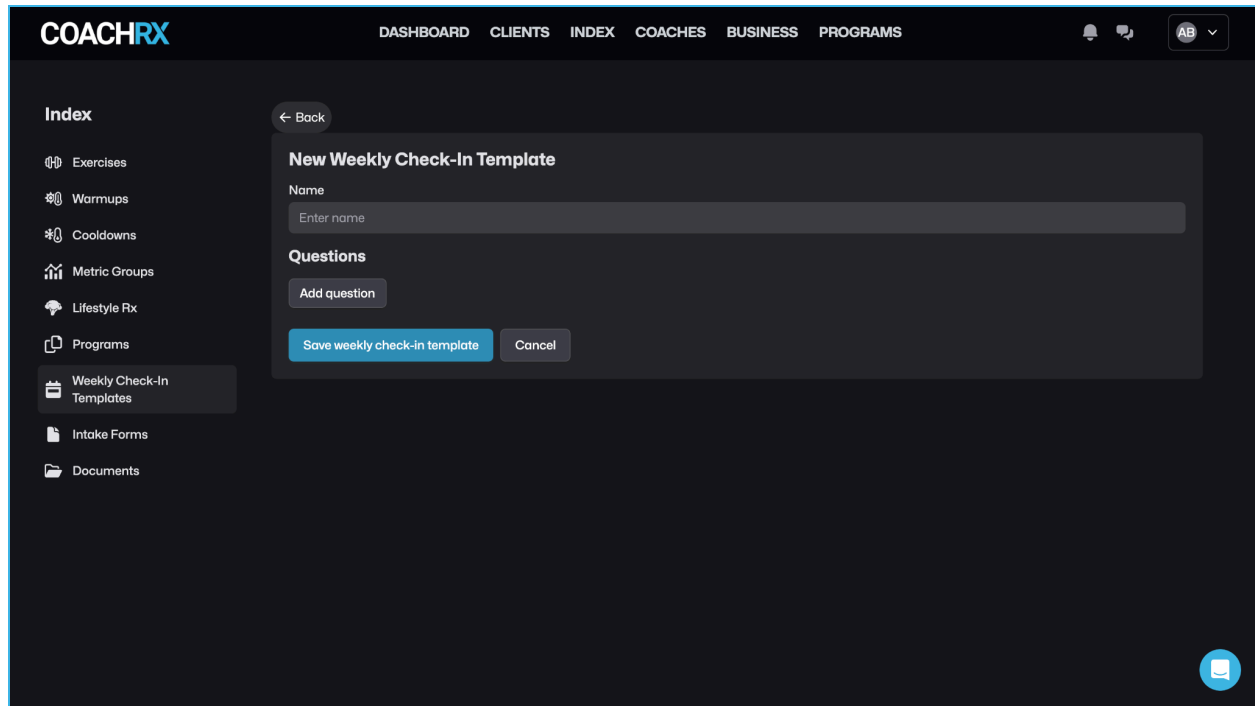
Intake Forms

First impressions matter, and your intake form sets the tone for your entire coaching relationship. A well-designed intake form gathers essential information about goals, health history, training experience, and lifestyle factors while demonstrating your professionalism and attention to detail. The intake process also helps you identify potential red flags, understand client expectations, and gather the baseline information needed for effective program design. Rather than conducting lengthy initial consultations to gather basic information, a comprehensive intake form allows you to focus consultation time on deeper discussion and relationship building.

Customize how you gather initial client information:

1. Navigate to **Index > Intake Forms**
2. **Modify the default form** or create a new one
3. **Add questions relevant to your coaching approach** including health history, goals, training experience, lifestyle factors, and equipment availability
4. Consider including questions about client preferences, past coaching experiences, and specific challenges they want to address
5. **Save** your form

Note: Each organization can only have one default intake form that will be used for all clients. Make sure your form captures all essential information needed across your coaching practice.

Documents

The Documents library serves as your client education hub, housing important resources that clients can access anytime through their mobile app. This eliminates repetitive explanations and ensures clients have consistent access to your coaching philosophies, exercise technique guides, nutrition principles, and operational procedures. Think of this as your digital resource library - from simple documents explaining your coaching process to detailed guides on specific topics you frequently address with clients. This feature is particularly powerful for creating a more premium coaching experience and reducing the time spent answering the same questions repeatedly.

Upload educational materials for your clients:

1. Navigate to **Index > Documents**
2. Click **"Add Document"**
3. **Upload PDF files** such as:
    - Client Standard Operating Procedures (SOPs)
    - Exercise technique guides
    - Nutrition fundamentals
    - Recovery protocols
    - Goal-setting worksheets
4. Use clear, descriptive names so clients can easily find relevant documents

5. **Save** to make available to all clients in their mobile app
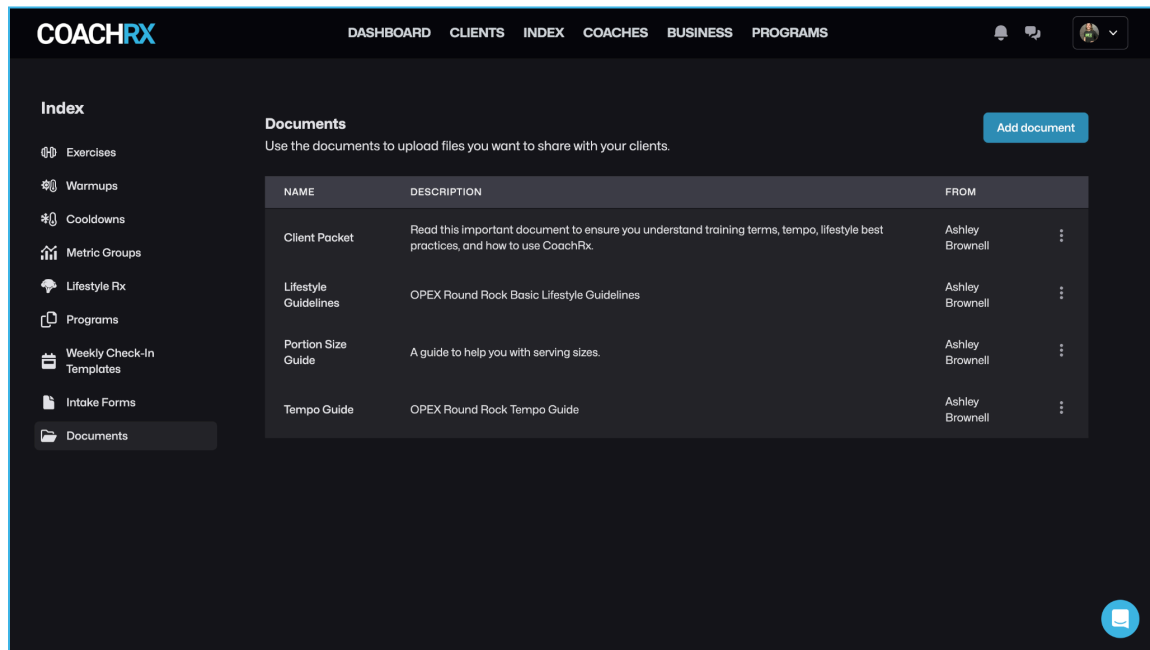
Pro Tip: Create a systematic naming convention for all items in your Index. For example, name warmups by body region and focus (e.g., "Lower Body - Hinge Focus") to make them easy to find when programming.

📹 Video: Designing Progressive Warm-up Systems

💡 For more detailed instructions and troubleshooting, visit our Index Help Center article.

Navigating Your Dashboard

Navigating Your Dashboard

Your Dashboard is command central for your coaching business, designed to help you stay proactive rather than reactive in your client management. Instead of juggling multiple spreadsheets, reminder systems, or manually tracking client progress, the Dashboard consolidates everything you need to know into one organized view. This central hub helps you identify potential issues before they become problems, maintain consistent communication standards, and ensure no client falls through the cracks, even as your business grows and your client roster expands.
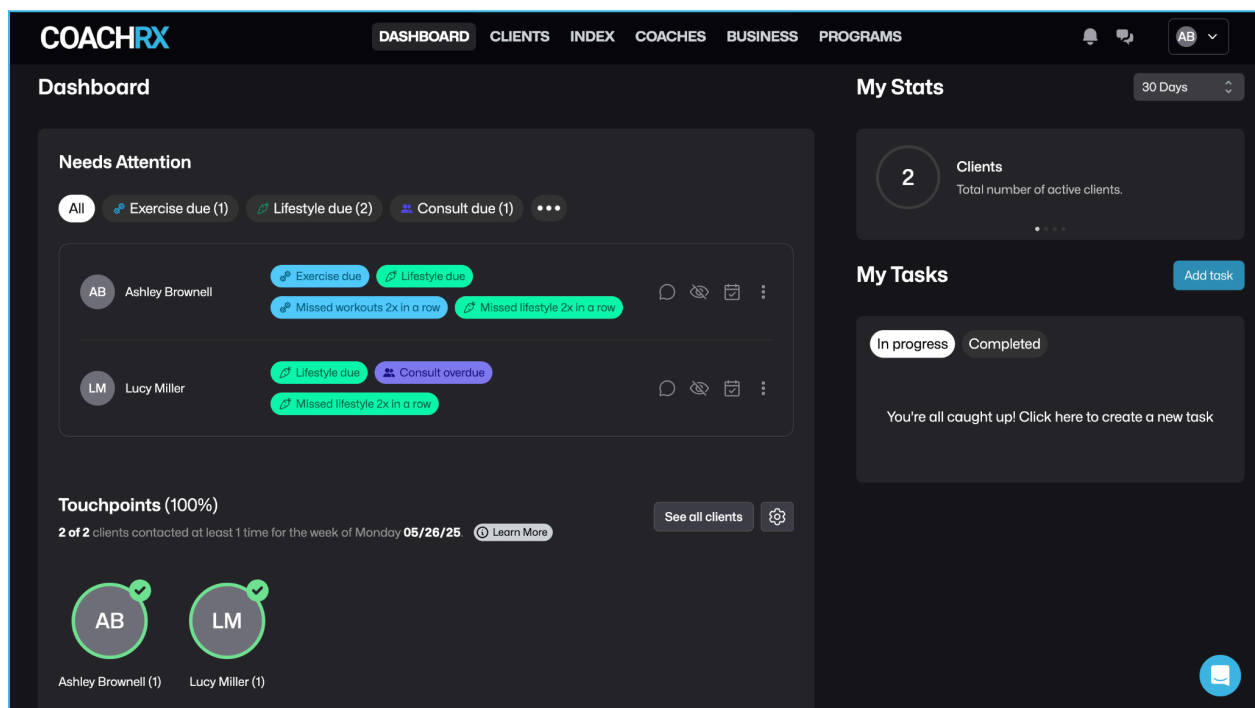
Needs Attention Section

The Needs Attention section transforms you from a coach who responds to problems into one who prevents them. Rather than waiting for clients to reach out when they're struggling or confused, this proactive system flags potential issues based on data patterns and program timelines. This allows you to intervene at the perfect moment, before a client becomes frustrated with missed workouts or before their program expires leaving them without guidance. It's like having a virtual assistant

constantly monitoring your client base and alerting you to opportunities for meaningful coaching interventions.

This section highlights critical coaching actions:

- **Exercise Due:** Clients needing new workout programs (preventing gaps in training)
- **Lifestyle Due:** Clients needing updated lifestyle prescriptions (maintaining habit momentum)
- **Consults Due:** Upcoming or overdue consultations (ensuring regular check-ins)
- **Missed 2+ Workouts:** Clients who've missed multiple scheduled sessions (early intervention opportunity)
- **Missed 2+ Lifestyle Prescriptions:** Clients struggling with lifestyle compliance (habit breakdown prevention)
- **Less than 50% Exercise/Lifestyle Compliance:** Clients needing intervention (retention risk management)

Use the filters to focus on specific categories or view all items at once, allowing you to prioritize your daily coaching tasks effectively.

Touchpoints

Consistent communication is what separates good coaches from great ones, but tracking these interactions manually is nearly impossible as your business grows. The Touchpoints feature gamifies your communication consistency, helping you maintain the personal connection that keeps clients engaged and progressing. This system recognizes that every comment, message, and acknowledgment matters in building the coach-client relationship that drives long-term success and retention.

The Touchpoints feature helps you track communication with clients:

- Each direct message or comment on a client's program counts as a touchpoint
- Set minimum weekly touchpoint goals to ensure no client feels neglected
- View your progress toward weekly touchpoint goals with visual indicators
- See which clients you've reached your goal with and who needs attention
- Use this data to maintain consistent communication standards across your entire client base

Activity Feed

The Activity Feed gives you real-time visibility into your clients' engagement without requiring them to proactively reach out to you. Instead of wondering whether clients are following their programs or how they're responding to your prescriptions, you can see their activity as it happens. This immediate insight allows you to celebrate wins in real-time, address concerns quickly, and maintain an active presence in their fitness journey even when you're not physically together.

Monitor real-time client activity:

- Filter by specific clients or view all client activity in one stream
- Toggle between Exercise Sessions, Lifestyle Prescriptions, or Weekly Check-In Feedback
- See completion rates, client comments, and submitted results
- Comment directly from this feed to acknowledge client progress and provide encouragement
- Use emoji reactions for quick positive reinforcement
- Identify patterns in client behavior and engagement levels

My Stats

Data-driven coaching decisions lead to better client outcomes, and My Stats provides the performance metrics you need to continually improve your coaching effectiveness. Rather than relying on gut feelings about how your clients are progressing, these concrete numbers help you identify trends, celebrate successes, and recognize areas where your coaching approach might need adjustment. This feature essentially gives you a report card on your coaching performance across different timeframes.

Review your coaching performance metrics:

- **Total Client Count:** Track your coaching business growth
- **Overall Client Compliance:** Average adherence across all programs and prescriptions
- **Exercise Compliance:** How consistently clients complete their workout programs
- **Lifestyle Compliance:** Success rate with habit-based prescriptions
- **Retention Insights:** Understand which approaches lead to better client adherence

Use the timeframe filters (30, 60, or 90 days) to analyze trends, identify seasonal patterns, and measure the impact of coaching adjustments over time.

My Tasks

Every successful coach needs a reliable task management system, but most generic task apps don't understand the unique workflows of fitness coaching. My Tasks is built specifically for coaches, automatically generating coaching-related tasks while giving you the flexibility to add your own. This ensures nothing falls through the cracks, from following up on missed sessions to remembering to update a client's program after their assessment.

Manage your coaching responsibilities:

- **Create custom tasks with due dates** for client-specific actions (follow up on injury, schedule consultation, update program)
- **Assign tasks to specific clients** to maintain context and organization
- **View automatically generated tasks** from the system (overdue payments, program expirations, assessment reminders)
- **Set recurring tasks** for regular coaching activities (monthly check-ins, quarterly assessments)
- **Check off completed items** and maintain a clear view of outstanding responsibilities
- **Prioritize urgent tasks** to focus your daily coaching efforts effectively

Pro Tip: Start each workday with a 5-minute Dashboard review. Check the Needs Attention section first, then scan the Activity Feed for comments that need your response. This quick routine will help you stay proactive and prevent client issues before they arise.

🎥 Video: Navigating your Professional Dashboard

Managing
Clients

Managing Clients

Efficient client management is the backbone of a scalable coaching business. As your practice grows, the difference between organized systems and chaotic client handling becomes the determining factor in your ability to deliver consistent, high-quality coaching while maintaining your sanity. CoachRx's client management tools are designed to help you maintain personal relationships and individualized attention even as your roster expands, ensuring that your 50th client receives the same level of care and organization as your first.

Adding Clients

The client onboarding process sets the tone for your entire coaching relationship. A smooth, professional setup experience immediately communicates your attention to detail and organizational standards. CoachRx's streamlined client addition process automatically handles the technical aspects of getting clients into the system while ensuring they receive clear instructions for accessing their coaching programs through the mobile app.

1. From the Clients tab, click **"Add Client"**
2. Enter the **client's name** and **email address**
3. Set the **client's time zone** (crucial for proper notification timing)
4. Set coach commission information *if you use the payroll feature*
5. Click **"Add Client"**

The client will receive an invitation email with step-by-step instructions to download the CoachRx app and create their account. Setting the correct time zone is critical for ensuring client messages, workout reminders, and lifestyle prescription notifications are delivered at appropriate times in their local time zone, not yours.

Importing Multiple Clients

Whether you're transitioning from another platform or onboarding a large group of clients simultaneously, the bulk import feature saves hours of manual data entry while maintaining accuracy and consistency. This is particularly valuable for coaches taking over existing client rosters, gym owners adding multiple members, or coaches who've been managing clients through spreadsheets and are ready to upgrade to a comprehensive system.

For bulk client importing:

1. Navigate to **Settings > Importing Clients**
2. **Download** the provided CSV template
3. Fill out client information in the spreadsheet including names, emails, time zones, and any additional data you want to import
4. **Upload** the completed CSV file
5. CoachRx will process the import in the background and automatically send invitation emails to all clients
6. You'll receive a confirmation email when the **import is complete**

Complimentary Transition Assistance

We understand that switching platforms can feel overwhelming, especially when you have an established client base and years of programming data. That's why CoachRx offers complimentary transition assistance to ensure your move to our platform is as smooth and stress-free as possible. ***Reach out to your Coach Success Manager, to inquire about Transition Assistance.***

Organizing with Tags

As your client roster grows, the ability to quickly filter and organize becomes essential for maintaining programming efficiency and ensuring no client receives subpar attention due to poor organization. Tags transform your client list from a simple alphabetical roster into an intelligent organizational system that matches your coaching workflow and business logic.

Use tags to efficiently organize your client list:

1. From the Clients screen, click **"Manage Tags"**
2. **Create tags** based on strategic categories such as:
   - **Programming days** (e.g., "Monday Design," "Wednesday Programming") - to batch similar design work
   - **Training goals** (e.g., "Strength Focus," "Fat Loss," "Athletic Performance") - to group clients with similar objectives
   - **Experience levels** (e.g., "Beginner," "Intermediate," "Advanced") - to manage complexity and attention needs
   - **Service tiers** (e.g., "Premium," "Standard," "Group Program") - to ensure appropriate service delivery
   - **Special considerations** (e.g., "Injury Management," "Pregnant," "Travel Frequently") - to flag clients needing special attention
3. **Apply tags to clients** by clicking the "+" under the Tags column next to their name
4. **Use tag filters** to quickly view subsets of your client roster during your programming sessions
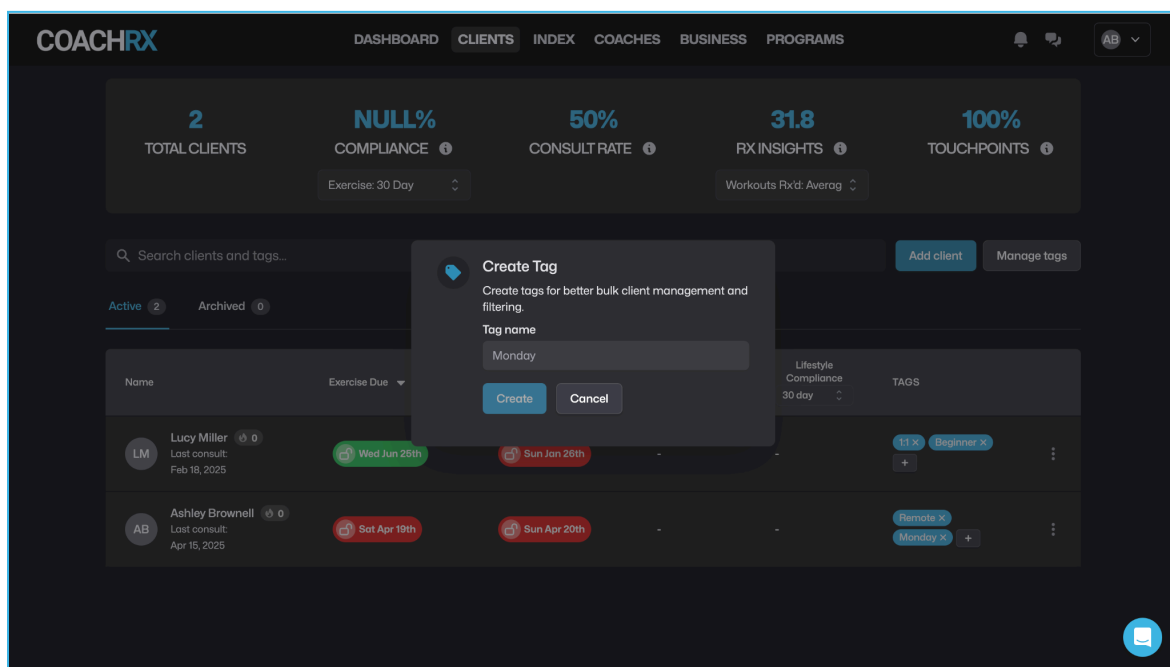
Archiving Clients

Client relationships naturally ebb and flow, some take breaks for life circumstances, others move away, and some simply need to pause their coaching temporarily. Rather than deleting client data and losing valuable history, the archive feature preserves all client information and progress while removing them from your active roster and monthly billing. This maintains the relationship and makes it easy to reactivate clients when they're ready to return.

When clients take a break or end their coaching:

1. **Click the three dots** next to the client's name
2. Select **"Archive Client"**
3. **Confirm the action** and **optionally add a note** about why they're being archived

Archived clients remain in your system with all their historical data intact but don't count toward your monthly subscription billing. You can unarchive them at any time, making it easy to welcome back former clients without starting from scratch. This also creates opportunities for re-engagement campaigns to archived clients who might be ready to return to coaching.

> **Pro Tip:** Leverage tags to transform your organizational workflow. By categorizing clients, whether by training days, fitness goals, or program types, you'll create a system that allows for quick filtering and more efficient coaching. Consider establishing a weekly programming rhythm using tags: design for "Monday" clients on Fridays, "Tuesday" clients on Saturdays, and so forth. This structured approach prevents the decision fatigue that comes from programming for all clients at once, ultimately maintaining high-quality program design throughout your client roster.

🎥 Video: Client Organization Strategies

💡 For a detailed walkthrough of your client page, check out our help center article.

Client Assessment & Data Collection

Client Assessment & Data Collection

Comprehensive client assessment is the foundation of personalized, effective programming and what separates professional coaches from those who simply assign generic workouts. CoachRx provides versatile tools to collect, store, and visualize client data, transforming raw assessment information into actionable insights that drive program design decisions. Rather than relying on guesswork or one-size-fits-all approaches, these assessment tools help you understand each client's unique starting point, limitations, and opportunities for improvement.

Assessment Section

The assessment section serves as a comprehensive record of their physical capabilities, limitations, and progress over time. This data becomes invaluable for making informed programming decisions, tracking improvements, and demonstrating your professional approach to clients. Access the assessment section from the client's calendar sidebar to maintain detailed records that inform every aspect of your coaching relationship.

OPEX Body

Body composition data provides crucial context for program design and goal setting. Understanding a client's metabolic baseline and body composition helps you set realistic expectations, choose appropriate exercise intensities, and track meaningful progress beyond just scale weight. This comprehensive view helps you coach the individual, not just their goals.

Record body composition metrics:

- **Weight** - baseline measurement and progress tracking
- **Body fat percentage** - for realistic goal setting and progress monitoring
- **Lean body mass** - to understand metabolic capacity and strength potential
- **BMR (Basal Metabolic Rate) -** for nutrition and energy balance guidance
- **Skeletal muscle mass** - to track muscle building progress and identify imbalances

OPEX Move

Movement assessment reveals the quality of your client's foundational movement patterns, identifying potential injury risks and programming limitations before they become problems. This

systematic evaluation ensures your exercise selections are appropriate for each client's current capabilities while highlighting areas that need corrective attention. The pass/fail system provides clear, objective criteria for decision-making.

Evaluate movement patterns with pass/fail assessments:

- **Scratch Test** - shoulder mobility and thoracic spine function
- **Air Squat** - lower body mobility, stability, and coordination
- **Toe Touch -** posterior chain flexibility and hip hinge mechanics
- **Lunge Test -** single-leg stability, hip mobility, and movement control
- **Straight Leg Raise** - hamstring flexibility and hip mobility
- **Front Plank** - anterior core strength and stability
- **Reverse Plank** - posterior chain strength and shoulder stability
- **Side Plank** - lateral core strength and stability

When a movement fails, select the specific fault and potential cause from the dropdown options. CoachRx will automatically generate priorities based on these assessments, ensuring your programming directly addresses identified limitations.
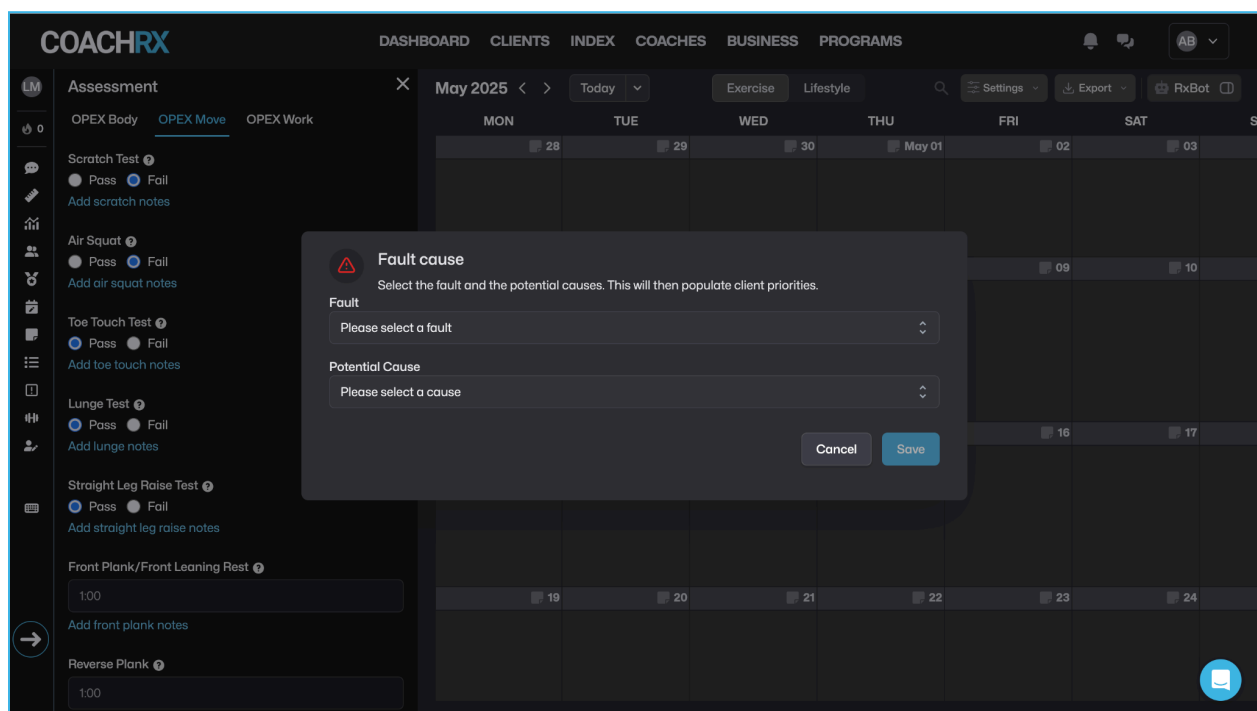
OPEX Work

Work capacity assessment provides objective data about your client's cardiovascular fitness and energy system development. This information guides training intensity recommendations, program progression rates, and helps you understand how much training stress each client can handle. The standardized protocols ensure consistent, comparable results over time.

Measure work capacity with standardized tests:

- **10-minute Air Bike test** - measures aerobic capacity with results normalized to body weight for fair comparison
- **Other energy system tests** - additional protocols based on client goals and training experience
- **Progress tracking** - visual graphs show improvements over time and inform program adjustments

💡 To learn more about how OPEX Body, Move and Work—Check out our help center article.

Metrics

Long-term progress tracking through standardized fitness tests provides objective evidence of your coaching effectiveness and helps clients see concrete improvements beyond subjective feelings. These tests also identify strength imbalances and weaknesses that need targeted attention in programming.

Track long-term progress with standardized fitness tests:

1. **Access Metrics** from the 📊 icon in the sidebar
2. **Select from resistance or energy system** categories based on client goals
3. **View the Structural Balance table** to identify strength imbalances across movement patterns
4. **Link prescribed exercises** to FMEs to automatically update the data when clients complete tests
5. **Use visual progress graphs** to demonstrate improvements and inform program adjustments
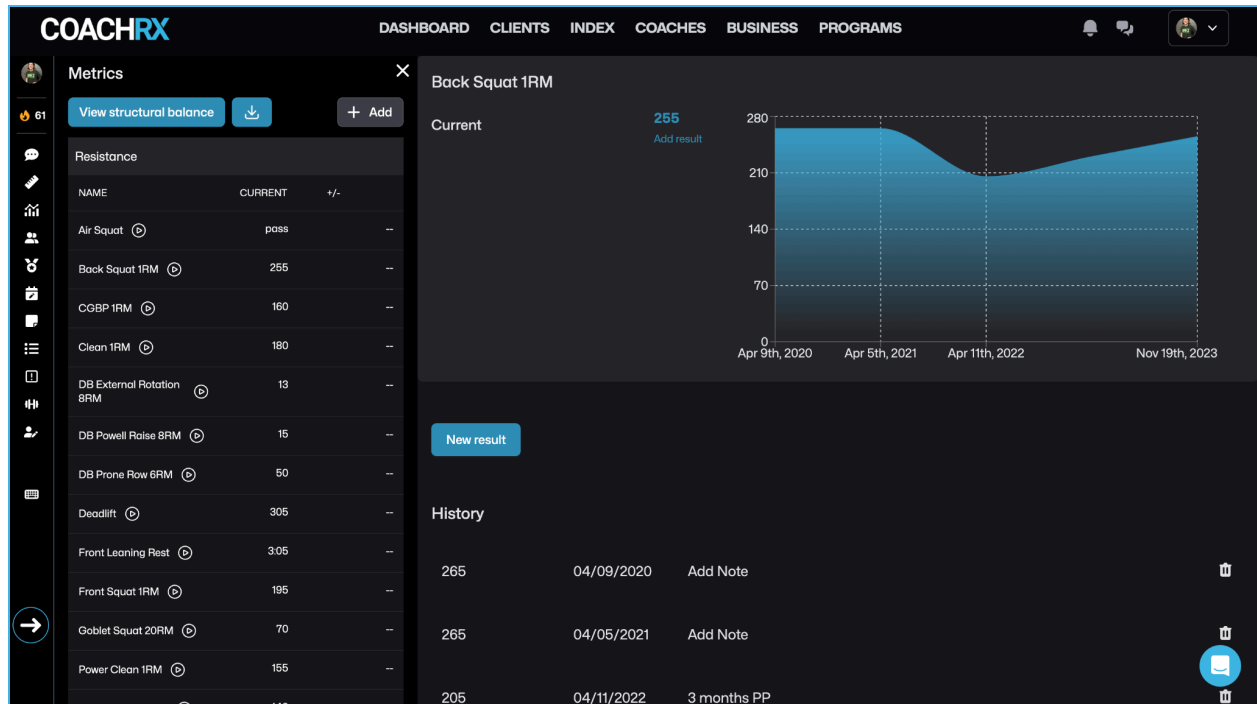
💡 This help center article is helpful in understanding the energy systems FMEs in CoachRx.

Client Schedule & Equipment

Accurate logistics information ensures your program designs are realistic and achievable for each client's unique situation. Nothing undermines a great program like prescribing exercises for equipment the client doesn't have or scheduling workouts on days they can't train.

Maintain accurate logistics information:

1. **Update the client's training schedule** to mark available training days and preferred training times
2. **Ensure equipment lists are complete** and current (clients can update these through their mobile app)
3. **Note any scheduling constraints**, travel patterns, or equipment limitations that affect programming
4. Keep emergency contact information and relevant medical information **updated**

Priorities

Priorities serve as your programming compass, ensuring every workout and lifestyle prescription moves the client toward addressing their most important needs. Without clear priorities, it's easy to get distracted by interesting exercises or lose focus on what will actually move the needle for each individual client.

Document key focus areas for each client:

1. **Click** the ⚠ icon in the sidebar
2. **Add specific, actionable priorities** (e.g., "improve squat motor control," "increase daily protein intake," "develop aerobic base")
3. **Update priorities** after consultations and assessments to reflect new insights
4. **Remove priorities** as they're successfully addressed to maintain focus on current needs
5. **Reference priorities** during every programming session to ensure alignment with client needs

Planning & Periodization

Structured planning transforms random workouts into purposeful progressions that build systematically toward client goals. This systematic approach ensures each workout fits into a larger plan, prevents plateaus, and demonstrates your professional approach to program design.

Create structured training progressions:

1. **Add a Long-Term Plan (macrocycle, typically 6-12 months)** - establishes the big picture vision and major training phases
2. **Create Short-Term Plans** (mesocycles, typically 4-8 weeks) within the long-term plan - focuses on specific adaptations and training blocks
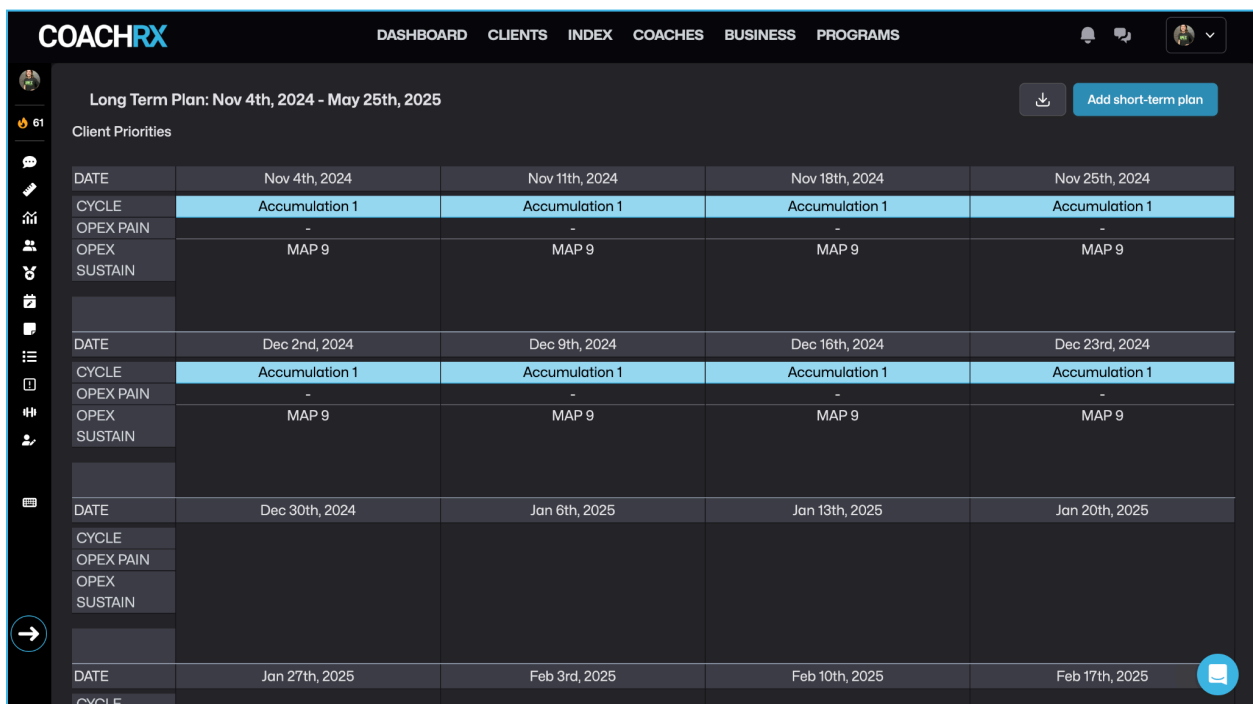3. **Define Daily Plans** (training splits) within each short-term plan - establishes the weekly training structure and movement patterns
4. **Set Cycle Priorities** specific to each short-term plan - ensures programming focus aligns with the current training phase

This hierarchical planning system ensures your daily programming decisions support long-term client success while providing clear structure for consistent, progressive program design.

COACHRX	DASHBOARD	CLIENTS	INDEX	COACHES	BUSINESS	PROGRAMS

Long Term Plan: Nov 4th, 2024 - May 25th, 2025
Client Priorities
Add short-term plan

DATE	Nov 4th, 2024	Nov 11th, 2024	Nov 18th, 2024	Nov 25th, 2024
CYCLE	Accumulation 1	Accumulation 1	Accumulation 1	Accumulation 1
OPEX PAIN	-	-	-	-
OPEX SUSTAIN	MAP 9	MAP 9	MAP 9	MAP 9

DATE	Dec 2nd, 2024	Dec 9th, 2024	Dec 16th, 2024	Dec 23rd, 2024
CYCLE	Accumulation 1	Accumulation 1	Accumulation 1	Accumulation 1
OPEX PAIN	-	-	-	-
OPEX SUSTAIN	MAP 9	MAP 9	MAP 9	MAP 9

DATE	Dec 30th, 2024	Jan 6th, 2025	Jan 13th, 2025	Jan 20th, 2025
CYCLE				
OPEX PAIN				
OPEX SUSTAIN				

DATE	Jan 27th, 2025	Feb 3rd, 2025	Feb 10th, 2025	Feb 17th, 2025
CYCLE				

💡 **For a detailed walkthrough of how to utilize the planning and periodization feature, check out our help center article.**

Pro Tip: After each assessment, immediately document 3-5 key priorities based on your findings. These priorities should guide your program design decisions and ensure you're addressing the client's most important needs first.

🎥 **Video:** 10 Minute Tip-Periodization Made Simple: From Macro to Daily Plans

Program
Design

Program Design

Efficient program design is at the heart of CoachRx and what transforms good coaches into exceptional ones. The platform offers intuitive tools to create personalized, effective training programs that reflect your coaching expertise while saving significant time through smart templating and workflow optimization. Rather than starting from scratch with every workout, CoachRx's program design interface builds on your previous work and systematic approach, allowing you to focus on the creative and individualized aspects of coaching while the platform handles the repetitive elements.

Calendar Views & Navigation

Your choice of calendar view dramatically impacts your programming efficiency and ability to see patterns in your client's training. Different views serve different purposes in the program design process, and mastering when to use each view will significantly improve your workflow and the quality of your progressions.

Choose your preferred calendar view based on your current task:

- **Day view** - Perfect for focusing intensively on a single session design, especially when creating complex workouts or when you need to concentrate without visual distractions from other training days
- **Week view -** Ideal for seeing training patterns across a week, ensuring proper balance between training stress and recovery, and checking that movement patterns are distributed appropriately
- **Month view** - Essential for viewing progressions over time, ensuring systematic advancement, and maintaining perspective on how individual workouts fit into longer training cycles

Use keyboard shortcuts (accessible via ⌨) to navigate efficiently between views, add exercises, create supersets, and perform other common actions without taking your hands off the keyboard, a time-saver that becomes invaluable when programming for multiple clients.

Creating Workouts

Workout creation in CoachRx follows a systematic structure that ensures no important elements are forgotten while maintaining flexibility for your creative coaching approach. This standardized process helps you deliver consistent quality across all clients while building efficiency through repetition and muscle memory.

1. **Click the** 🏋 **icon** on your desired training day to begin creating a new workout
2. **Add a descriptive title for the session** (e.g., "Lower Body Strength - Week 2," "Aerobic Base Development," "Full Body Circuit") that helps both you and your client understand the session's purpose
3. **Include coach notes to provide context,** motivation, or specific instructions (e.g., "Focus on tempo today - quality over quantity," "This should feel challenging but sustainable," "If energy is low, reduce volume by 20%")
4. **Add a warmup from your pre-built library** or create a new one specific to the day's training focus - this preparation phase is crucial for performance and injury prevention
5. **Design the main workout** using either individual exercises (for strength/resistance training) or mixed modal pieces (for conditioning/circuit work), guided by your daily plan priorities
6. **Add a cooldown** if desired to help clients transition from training stress to recovery
7. **Save the workout and review it** from the client's perspective to ensure clarity and completeness
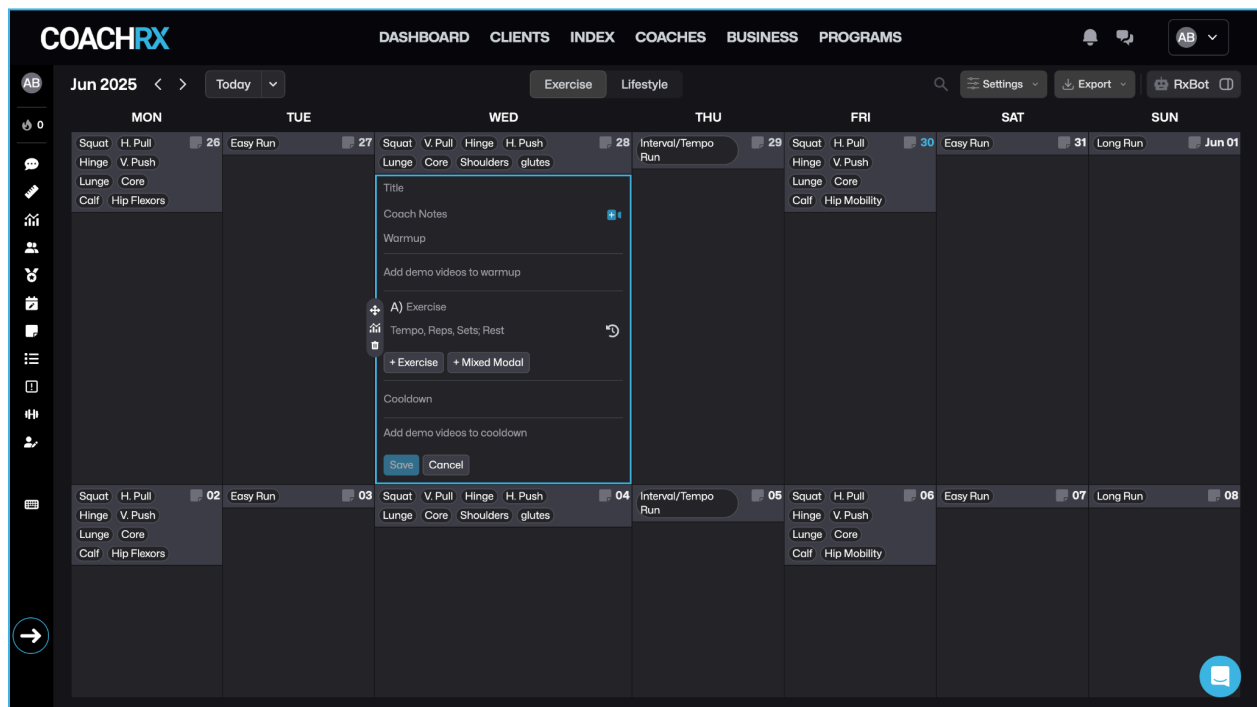
🤖 RxBot AI Assistance

For faster program creation, you can also leverage RxBot, CoachRx's AI coaching assistant, to generate complete workouts based on your client's data and training goals. Simply click the RxBot button in the calendar, specify your training parameters (days, duration, focus areas), and let the AI create a foundation that you can customize to your coaching style. This is particularly useful when you need to create programs quickly or want inspiration for new training approaches.
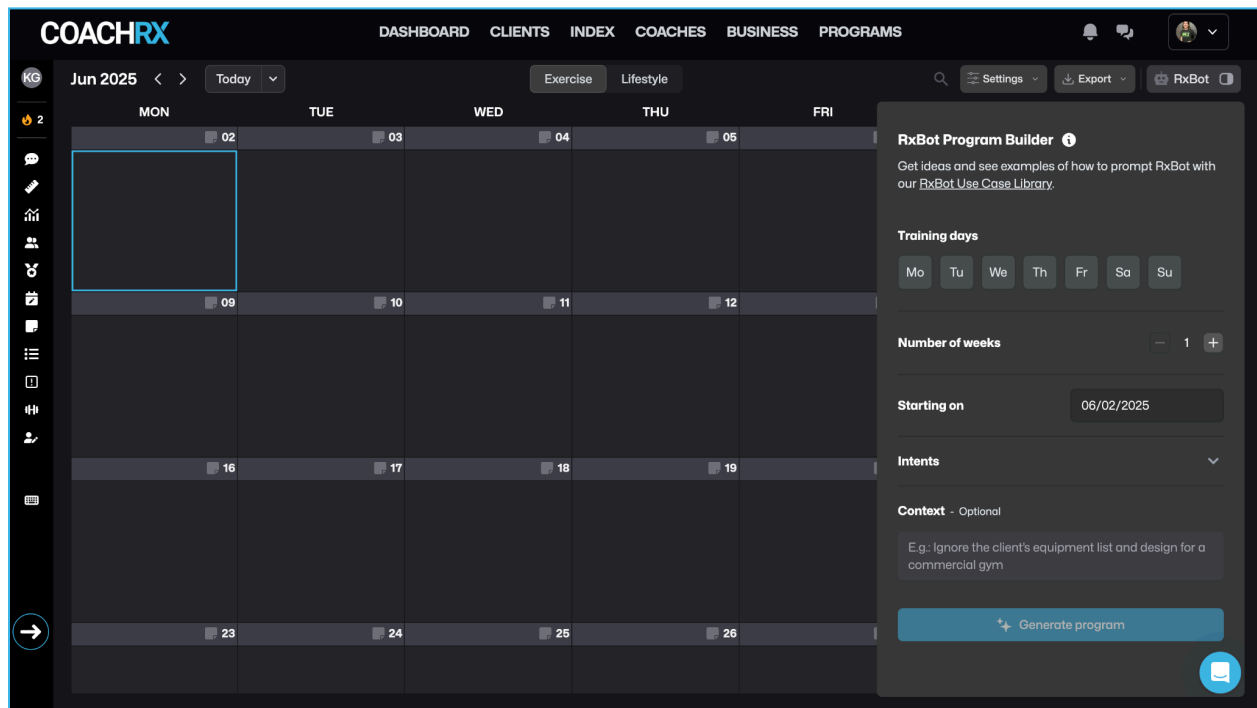
Exercise vs. Mixed Modal Programming

Understanding when to use exercises versus mixed modal pieces is crucial for effective program design and clear client communication.

Exercises are best for:

- Strength and resistance training programs
- Skill development and movement pattern work
- When you want to specify exact sets, reps, tempo, and rest periods
- Progressive overload tracking
- Superset, tri-set, or giant set configurations

Mixed Modal pieces are ideal for:

- Conditioning workouts and circuits
- Energy system training
- Time-based challenges (EMOM, AMRAP, for-time workouts)
- When the overall stimulus matters more than individual exercise progression

Program Design Best Practices

- Design in weekly blocks to maintain consistency and allow for systematic progression
- Reference your daily plans to stay focused on movement pattern priorities
- Use the copy/paste function for efficient progression from week to week
- Maintain a consistent naming convention for workouts to help clients understand their training structure
- Include context in coach notes to help clients understand the purpose behind each session
- Preview workouts from the client perspective to ensure instructions are clear and complete

This systematic approach to program design ensures every workout serves a purpose in your client's overall development while maintaining the efficiency needed to serve multiple clients at a high level.

💡 For a detailed walkthrough of how to navigate the client calendar, check out our help center article.

Program Templates & Live Programs

The Programs feature allows you to create template programs that can be used with multiple clients, sold through your storefront, or used as inspiration for your program design. CoachRx offers two types of programs to fit different coaching models and business needs.

Program Types:

Standard Programs - Programs not tied to specific calendar dates. These are designed to run for a set number of days and end when completed. Perfect for:

- Fixed-duration training blocks (e.g., "8-Week Strength Builder")
- Specialized programs with defined endpoints
- Programs where clients can start at any time

Live Programs - Programs tied to specific calendar dates where all assigned clients follow the same schedule. These are ongoing programs with no defined end date. Ideal for:

- Group fitness or "workout of the day" style programming
- Seasonal training programs
- Community-based coaching where clients train together

Creating Programs:

7. Navigate to **Index > Programs**
8. Click **"Add Program"**
9. **Enter program name and description**
10. **Choose** Standard or Live program type
11. **Design** your complete program
12. **Save** to make available for assignment or sale

Assigning Programs:

- **Standard Programs:** Choose a start date and decide whether to sync changes (updates to the program will apply to currently enrolled clients)
- **Live Programs:** Simply assign clients to the program - they'll automatically receive whatever you design on the live calendar

Using Programs in Your Business:

- **Client Assignment:** Assign programs directly to individual or multiple clients from their calendars
- **Storefront Sales:** Sell programs online through your CoachRx storefront for passive income
- **Efficiency Tool:** Use programs to deliver consistent, proven training protocols to multiple clients simultaneously

CoachRx Program Templates:

Access our library of expert-designed program templates created by top coaches to:

- Learn from proven program design principles
- See how experienced coaches structure progressions
- Use as inspiration for your own program development
- Study different approaches to strength, hypertrophy, and energy system development

Pro Tip: Design 7 days at a time using the Month view. This allows you to see the previous week's programming while creating progressions for the current week. Use the copy and paste feature to duplicate similar workouts, then modify variables (load, volume, etc.) to create appropriate progressions.

🎥 **Video:** Study Programs to Learn Program Design

Lifestyle & Nutrition Programming

Lifestyle & Nutrition Programming

CoachRx enables you to design comprehensive lifestyle and nutrition prescriptions alongside exercise programming, creating truly holistic coaching experiences that address the full spectrum of factors affecting client success. While many coaches focus exclusively on what happens during the one hour clients spend exercising, the reality is that the other 23 hours of the day often determine whether clients achieve their goals. This lifestyle programming approach recognizes that sustainable results come from systematically building better daily habits rather than relying solely on exercise to drive change.

Accessing the Lifestyle Calendar

The dedicated lifestyle calendar provides a clean, organized view of your clients' habit-building journey, separate from their exercise programming but equally important to their success. This separation allows you to focus specifically on lifestyle interventions without the visual clutter of workout details, making it easier to track habit compliance and identify patterns in lifestyle behaviors.

1. **Open your client's calendar** and locate the tab navigation at the top
2. Click the **"Lifestyle" tab** (positioned next to "Exercise") to switch to the lifestyle-specific view
3. This dedicated view separates lifestyle prescriptions from exercise programming, allowing you to see patterns in habit compliance and lifestyle progression without distraction

Creating Lifestyle Prescriptions

Lifestyle prescriptions should be approached as systematic behavior change interventions, not casual suggestions. Each prescription represents an opportunity to build a specific habit that supports your client's broader goals. The key is starting small, being specific, and focusing on consistency over perfection.

1. **Click the** 🥦 on any date in the lifestyle calendar to begin creating a prescription
2. Select **"Add Lifestyle"** to open the prescription creation interface
3. **Choose a lifestyle type** from the available options (water intake, sleep, nutrition, movement, etc.) or create a custom category
4. **Set specific, measurable targets** with optional ranges to allow for real-life flexibility (e.g., 8-9 hours of sleep ±30 minutes, 80-100 oz of water daily)
5. **Schedule reminder notifications** at strategic times when clients are most likely to engage with the habit

6. Choose recurrence patterns based on the habit's nature (daily for hydration, specific days for meal prep, etc.)
7. Set the duration (up to 12 weeks) to allow sufficient time for habit formation while maintaining focus
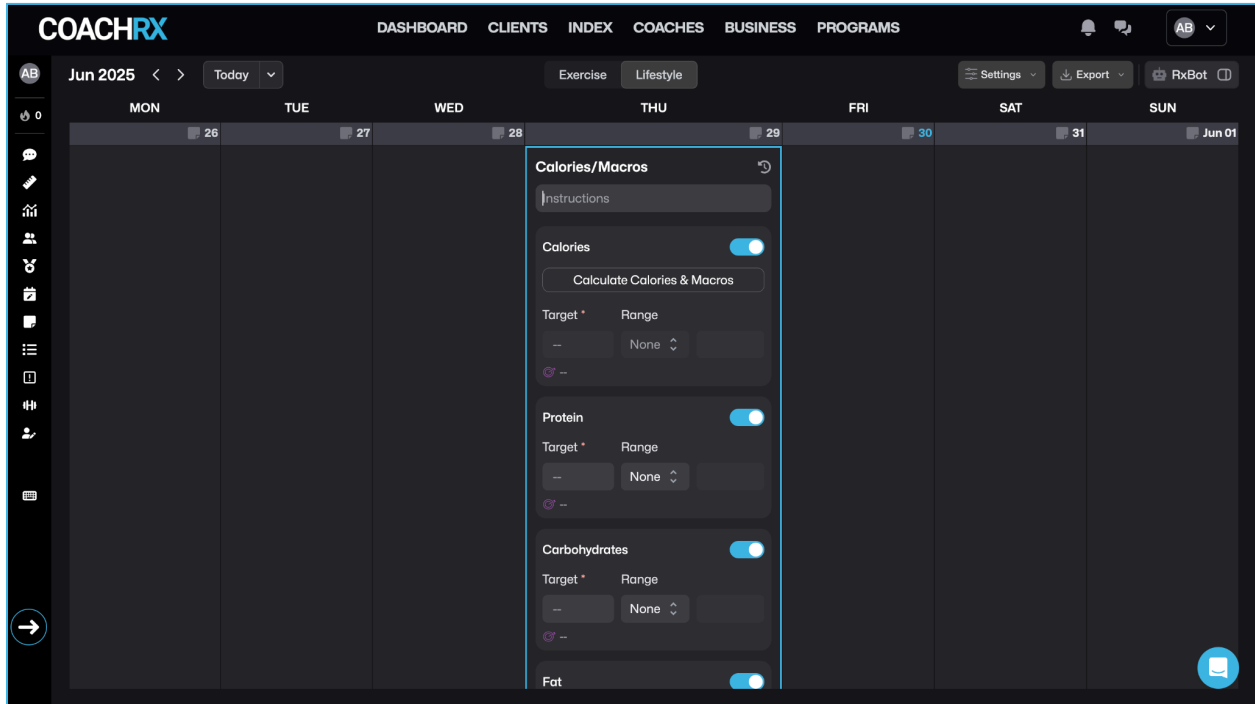
Types of Lifestyle Prescriptions

The versatility of lifestyle prescriptions allows you to address virtually any aspect of your client's daily routine that impacts their health and fitness outcomes. This comprehensive approach recognizes that lasting change comes from improving multiple lifestyle factors systematically.

CoachRx supports various lifestyle focuses:

- **Nutrition** - Macronutrient targets, meal timing, food quality focus, meal preparation habits, mindful eating practices
- **Hydration** - Daily water intake targets, timing of fluid consumption, electrolyte balance
- **Sleep** - Duration targets, quality metrics, sleep hygiene practices, bedtime routines
- **Movement** - Daily step goals, active time requirements, movement breaks, posture awareness
- **Recovery** - Meditation practice, stretching routines, stress management techniques, breathing exercises
- **Custom Categories** - Create your own lifestyle focuses based on individual client needs or your coaching specialty

Photo-Based Nutrition Tracking

Traditional nutrition tracking can be overwhelming and unsustainable for many clients. Photo-based tracking offers a middle ground that provides accountability and education without the burden of detailed calorie counting or macro tracking.

For simplified nutrition accountability:

1. **Create a lifestyle prescription** specifically for meal photo uploads with clear expectations
2. **Include specific instructions** such as "Upload photos of all meals with brief descriptions of ingredients and portion sizes"
3. **Set daily reminders** at appropriate times (e.g., evening reminder to upload the day's meals)
4. **Review uploaded photos** regularly to provide constructive feedback on food choices, portion sizes, and eating patterns
5. **Use photos as conversation starters** during consultations to discuss nutrition education and improvements

Progression & Monitoring

Lifestyle change is a gradual process that requires consistent monitoring and strategic progression. Unlike exercise progression, which often follows predictable patterns, lifestyle habits need more nuanced attention to individual circumstances and readiness for change.

1. **Review compliance** in the Activity Feed to spot patterns and identify clients who may need additional support
2. **Adjust prescriptions** based on client feedback - if a habit isn't sticking, consider making it smaller or changing the approach rather than abandoning it
3. **Discuss lifestyle adherence** during monthly consultations to understand barriers, celebrate successes, and plan next steps
4. **Graduate clients from one habit to the next** as they master each skill - avoid overwhelming them with too many simultaneous changes
5. **Track long-term trends** to demonstrate progress and maintain motivation during challenging periods

Pro Tip: Focus on prescribing behaviors (habits) rather than outcomes. For example, instead of prescribing "lose 2 pounds this week," prescribe "eat a protein source with breakfast daily." This approach gives clients direct control over their success and builds the foundation for sustainable long-term change. This systematic approach to lifestyle programming ensures that your clients develop the daily habits necessary to support their exercise efforts and achieve lasting transformation.

🎥 Video: Lifestyle-First Coaching Approach

💡 For more detailed instructions and troubleshooting, visit our Lifestyle Planning Help Center article.

Consultations & Check-ins

Consultations & Check-ins

Effective consultations are what transform transactional coaching relationships into transformational partnerships. These structured conversations provide the foundation for understanding your clients' true motivations, identifying potential obstacles before they derail progress, and maintaining the personal connection that keeps clients engaged long-term. CoachRx's consultation system ensures these crucial touchpoints are documented, trackable, and contribute meaningfully to your coaching effectiveness.

Initial Consultation

The initial consultation sets the tone for your entire coaching relationship and provides the foundation for all future program design decisions. This is your opportunity to move beyond surface-level goals and understand the deeper motivations, fears, and circumstances that will ultimately determine your client's success. Thorough documentation of this conversation becomes invaluable reference material throughout the coaching relationship.

Document your first client meeting:

Click the 👥 **icon** in the sidebar to access the consultation management system

1. **Select the "Initial" tab** to create your first comprehensive client record
2. **Record comprehensive notes** that capture both explicit information and your professional observations, including:
    - **Client goals and expectations** - both stated objectives and underlying motivations you uncover
    - **Training history** - previous experience, what worked, what didn't, and why they stopped
    - **Lifestyle factors -** work schedule, family obligations, stress levels, sleep patterns, travel frequency
    - **Potential obstacles** - anticipated challenges, past failure patterns, resource limitations
    - **Initial strategy and prioritie**s - your professional assessment of where to focus first
    - **Communication preferences** - how they like to receive feedback and how often they want contact

These notes remain permanently accessible for future reference, allowing you to maintain continuity and demonstrate your attention to detail months or years later.

Weekly Check-ins

Regular check-ins create a systematic feedback loop that keeps you informed about your clients' experiences between formal consultations. Rather than waiting for clients to proactively communicate problems or successes, weekly check-ins provide structured opportunities to gather data about training satisfaction, lifestyle compliance, energy levels, and emerging concerns before they become significant issues.

Establish regular client feedback:

1. From the Consultation section, **click the "Weekly" tab** to set up automated check-in systems
2. **Select a check-in template** from your Index that aligns with your coaching priorities and information needs
3. **Choose** which day of the week to **send the check-in** based on your workflow and client preferences (many coaches prefer Sunday for weekly reflection)
4. **Toggle the feature** on (blue) to activate the automated system
5. **Save your settings** to begin the weekly check-in cycle

Clients will receive their check-in form in the app on the specified day, with gentle reminders if they forget to complete it. Their responses appear in your *Activity Feed* where you can review patterns, identify concerning trends, and provide timely support through comments or direct messages.

Monthly Consultations

Monthly consultations serve as comprehensive progress reviews and relationship maintenance sessions. These deeper conversations allow you to assess program effectiveness, adjust strategies based on results and feedback, celebrate achievements, and address any emerging challenges. Regular monthly touchpoints also demonstrate your ongoing investment in the client's success.

Schedule regular progress reviews:

1. **Access the "Monthly" tab** in the Consultation section to manage your consultation schedule
2. **Create a new consultation** entry for each scheduled meeting to maintain organized records
3. **Record detailed notes** during your conversation including progress observations, program adjustments, goal refinements, and action items
4. **Export notes** to the client if desired to reinforce key takeaways and demonstrate your thorough approach
5. **Schedule the next consultation** to maintain consistent cadence and accountability

The system tracks when your last consultation occurred, helping you maintain a consistent monthly rhythm and ensuring no client goes too long without meaningful contact.

Custom Client Reports

Professional progress reports serve multiple purposes: they provide clients with tangible evidence of their progress, demonstrate the value of your coaching services, and create powerful marketing tools when shared (with permission) as success stories. These comprehensive reports also help clients see the big picture of their journey during challenging periods when day-to-day progress feels slow.

Create professional progress reports:

1. From various sections (Assessment, Consultation, Fitness Monitoring, etc.), **click the "Export" button** to access report generation
2. **Select which data to include** based on the report's purpose:
   - **Workout calendar** - showing program progression and consistency
   - **Consultation notes** - highlighting key insights and strategic decisions
   - **Assessment data** - demonstrating objective improvements in movement and fitness
   - **Lifestyle compliance** - showing habit formation and behavior change success
   - **Structural balance tables** - illustrating strength improvements and imbalance corrections
3. **Enter the email address(es) to receive the report** (client, family members, or referral sources)
4. **Send the branded PDF report** that reinforces your professional image and coaching value
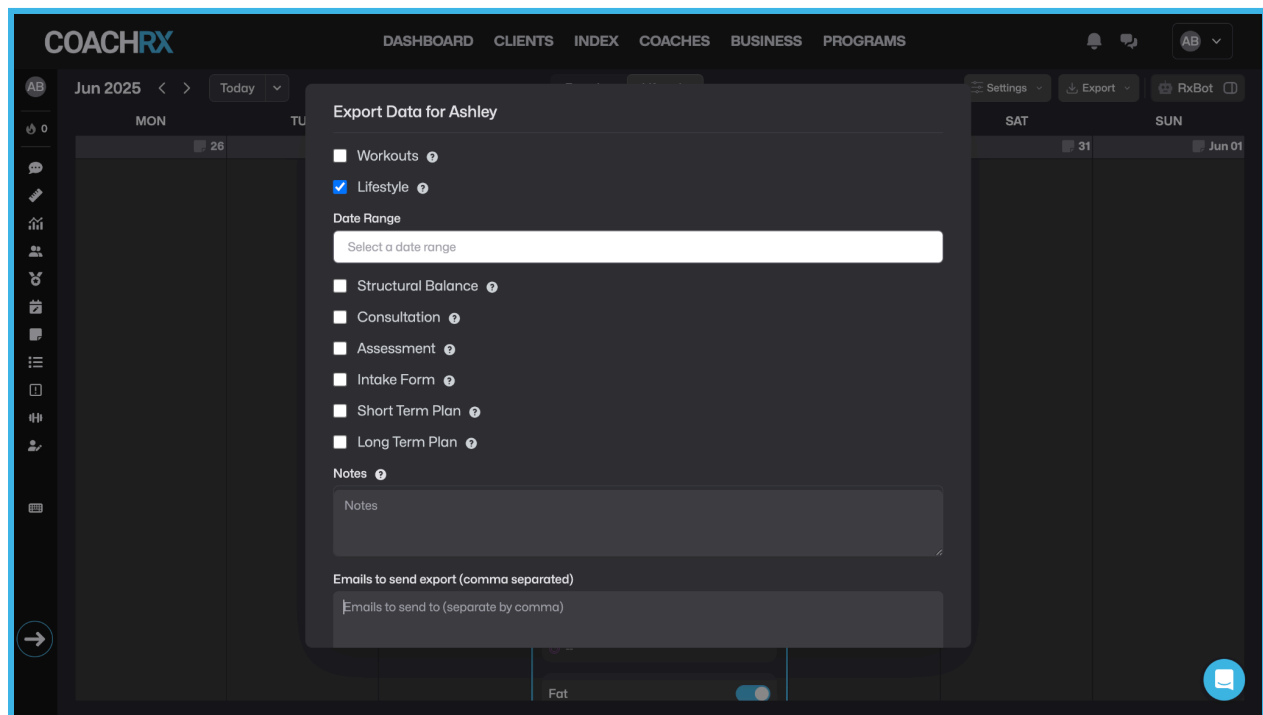
These reports provide clients with tangible evidence of their progress and your professional coaching value, while also serving as powerful tools for client retention and referral generation.

💡 **For a detailed walkthrough of how to utilize custom client reports, check out our help center article.**

Pro Tip: After each weekly check-in, respond with a brief video message using the Loom integration. This personal touch takes only 1-2 minutes of your time but significantly enhances the client experience and builds stronger coaching relationships.
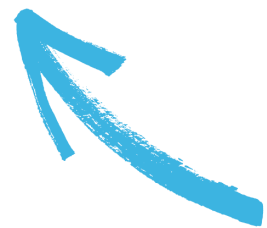
🎥 **Video: How to Structure your First Consultation**

💡 **For consultation templates check out our Education and Resources Page**
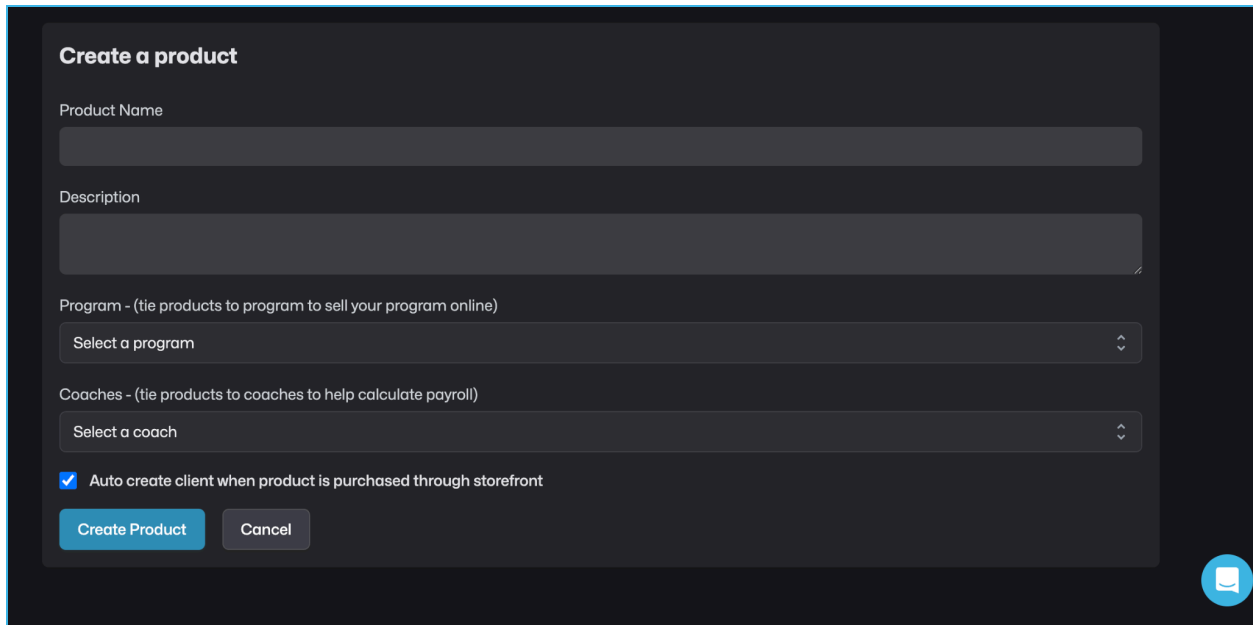
Business
Suite

Business Suite

CoachRx's Business Suite provides comprehensive tools to manage the financial and operational aspects of your coaching business, all within the same platform you use for program design. This integrated approach eliminates the need for multiple software subscriptions, reduces administrative complexity, and creates a seamless experience for both you and your clients. Rather than juggling separate systems for payments, client management, and program delivery, the Business Suite ensures all aspects of your business work together harmoniously.

Payments

Professional payment processing is essential for any serious coaching business. CoachRx's payment system, powered by Stripe, handles everything from one-time program purchases to complex subscription billing, while maintaining PCI compliance and providing detailed financial reporting. This system transforms payment collection from a potential friction point into a smooth, professional experience that builds client confidence in your services.

Process payments directly within CoachRx:

1. **Connect your Stripe account in the Business Suite** to enable secure payment processing with industry-leading fraud protection
2. **Create products and pricing plans** that reflect your service offerings, from individual sessions to comprehensive coaching packages
3. **Set up one-time payments for program purchases or recurring subscriptions** for ongoing coaching relationships
4. **Manage customer billing information** including payment methods, billing addresses, and subscription details
5. **Track payment history and upcoming charges** to maintain accurate financial records and proactively address payment issues

Storefronts & Sales Pages

Your online presence is often the first impression potential clients have of your business. CoachRx's storefront feature allows you to create professional, conversion-optimized sales pages without needing separate website hosting or e-commerce platforms. These storefronts integrate seamlessly with your payment processing and client management systems, creating a smooth customer journey from discovery to purchase to program delivery.

Create professional online storefronts:

1. **Build organization and/or coach-specific storefronts** to represent your brand or highlight individual coaches within your business
2. **Customize with images, videos, and compelling copy** that communicates your unique value proposition and coaching philosophy
3. **Add product offerings** with detailed descriptions that clearly explain what clients receive and why they should choose your services
4. **Integrate testimonials and FAQs** to address common concerns and build social proof
5. **Publish your storefront with a unique UR**L that can be shared across all marketing channels
6. **Share on social media** or **embed on your website** to drive traffic and convert prospects into paying clients
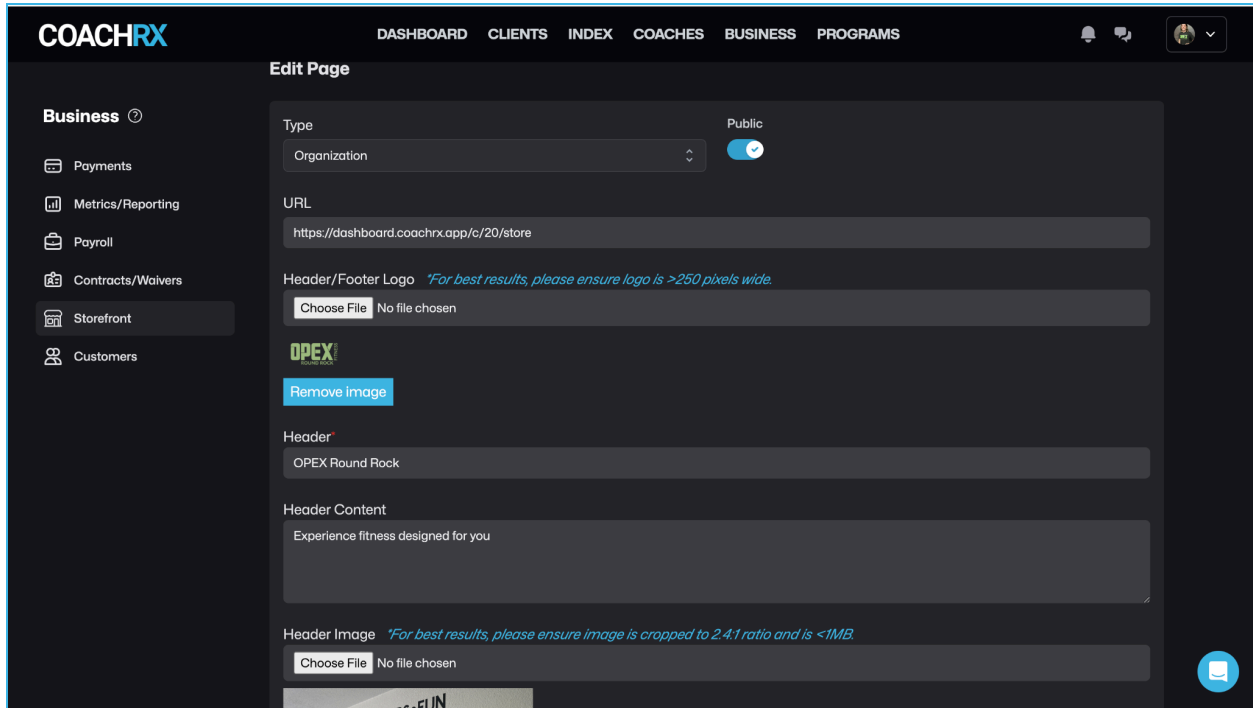
The storefront automatically creates client accounts upon purchase, eliminating manual onboarding steps and ensuring immediate access to your coaching programs.

💡 For more detailed instructions and troubleshooting, visit our Creating Your Storefront Help Center article.

Metrics & Reporting

Data-driven business decisions lead to sustainable growth and improved profitability. CoachRx's comprehensive reporting system provides the insights you need to understand your business performance, identify trends, and make informed decisions about pricing, marketing, and service delivery. These metrics help you move beyond guessing about what's working to making strategic decisions based on concrete data.

Access business insights:

1. **View gross and net revenue** to understand your true profitability and business growth trajectory

2. **Track monthly recurring revenue (MRR)** to monitor subscription business health and predict future income
3. **Monitor total subscriptions and growth trends** to identify patterns in client acquisition and retention
4. **Analyze average price point per subscription** to optimize your pricing strategy and service offerings
5. **Track new and churned clients** to understand your retention rates and identify areas for improvement
6. **Manage invoices and payment status** to maintain healthy cash flow and address payment issues proactively

These insights enable you to make strategic decisions about your business growth, pricing adjustments, and service improvements based on real performance data.

💡 For more detailed instructions and troubleshooting, visit our Metrics and Reporting Help Center article.

Contracts & Waivers

Legal protection and clear agreements are essential for any fitness business. CoachRx's contract and waiver system streamlines the process of creating, sending, and storing legal documents while ensuring clients can easily review and sign important agreements. This professional approach protects your business while demonstrating your attention to detail and commitment to proper procedures.

Create and manage legal documents:

1. **Design contract and waiver templates** that reflect your business policies and legal requirements
2. **Send to clients with a few clicks** directly from their profile, eliminating manual document management
3. **Clients receive secure links** to review and digitally sign documents from any device
4. **Completed documents are stored within CoachRx** for easy access and organization
5. **Access records anytime** from the dashboard to verify compliance and retrieve signed agreements when needed
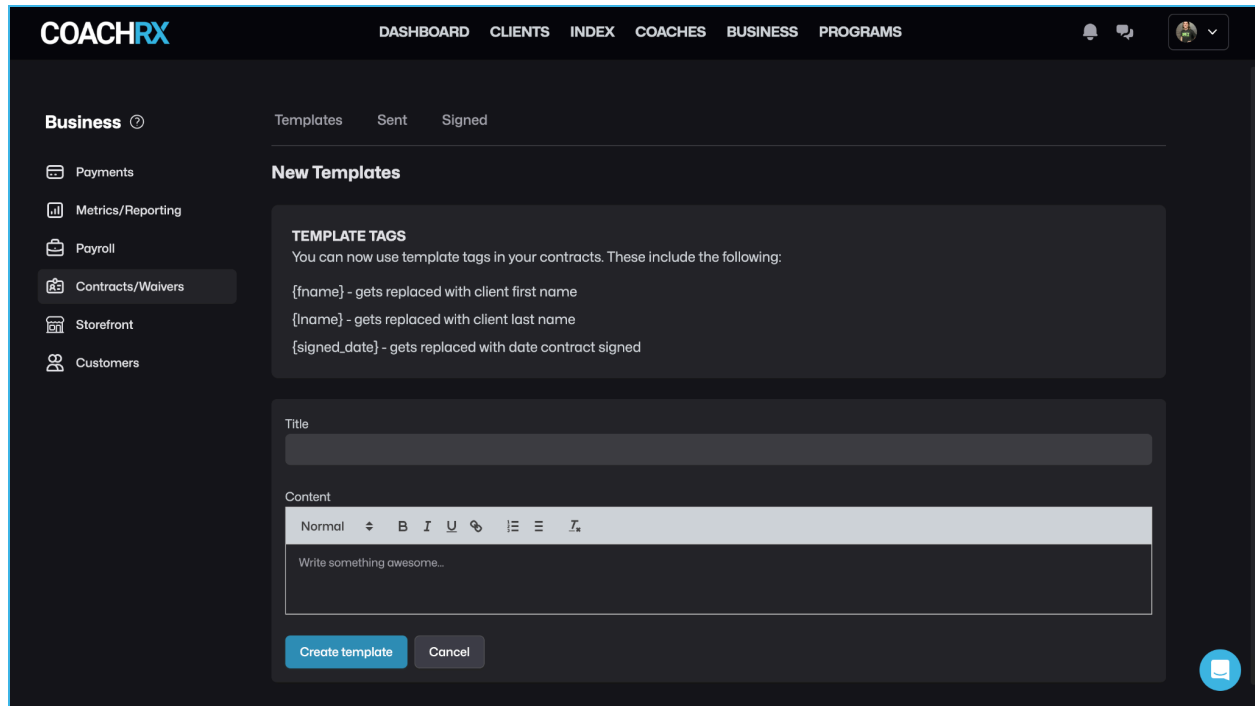
The system maintains a complete audit trail of document delivery, viewing, and signature completion, providing legal protection and professional documentation.

💡 For more detailed instructions and troubleshooting, visit our Contracts and Waivers Help Center article.

✅ For contract and waiver templates check out our Education and Resources Page.

Payroll

For businesses with multiple coaches, managing compensation can become complex and time-consuming. CoachRx's payroll system automates commission calculations, tracks coach earnings, and provides detailed reporting for tax purposes. This feature eliminates manual spreadsheet tracking and ensures accurate, timely compensation for your team.

For multi-coach businesses:

1. **Set commission structures** (by coach, client, or product) to align compensation with your business model and performance incentives
2. **Track coach earnings automatically** based on client payments and commission rates
3. **Run payroll for specific date ranges** with detailed breakdowns of earnings and deductions
4. **Add additional compensation items** as needed for bonuses, adjustments, or one-time payments
5. **Export reports for accounting purposes** to maintain accurate financial records and tax compliance
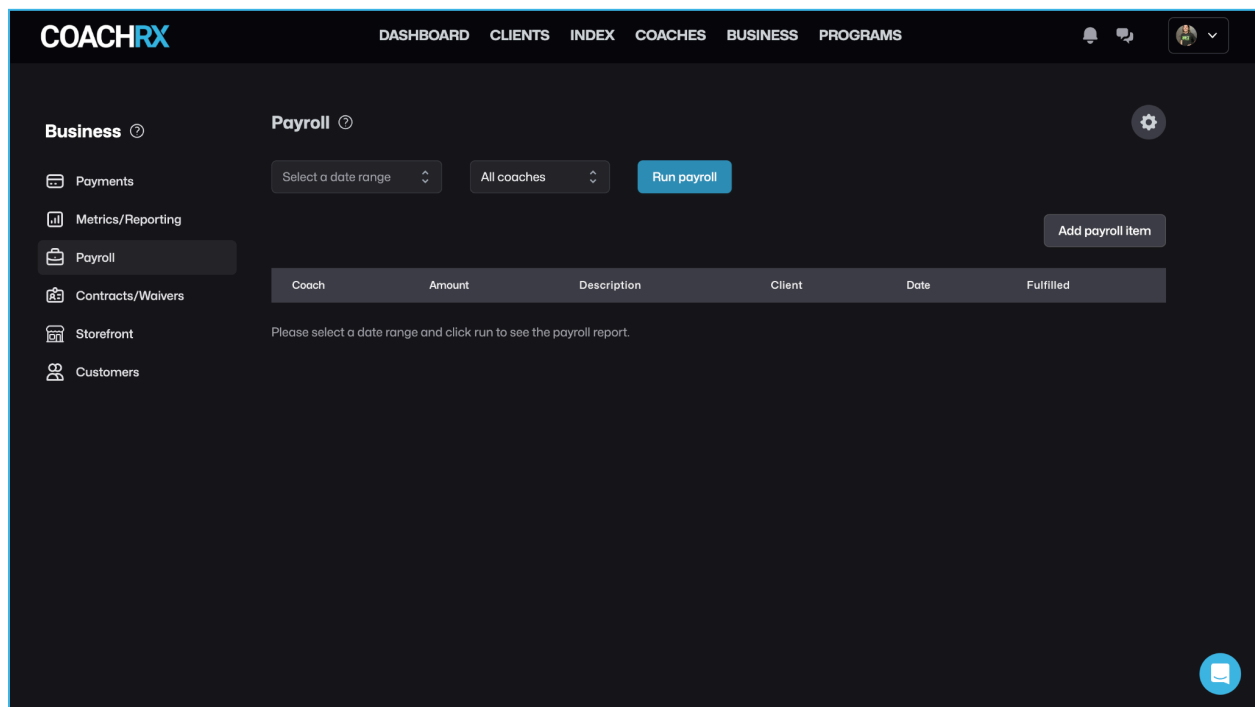
This system provides a checks and balance to ensure your coaches are compensated accurately and on time while providing the documentation needed for proper business accounting.

💡 For more detailed instructions and troubleshooting, visit our payroll Help Center article.

Client Management

Centralized client information creates efficiency and ensures nothing falls through the cracks. CoachRx's client management system consolidates all client data, from payment history to program participation, into a single, easily accessible location. This comprehensive view enables better client service and more informed business decisions.

Maintain comprehensive client records:

1. **View all client information in one place** including contact details, service history, and payment status
2. **Update payment methods and billing details** without requiring client involvement in most cases
3. **See subscription status and history** to understand client lifetime value and retention patterns
4. **Manage upcoming and past invoices** to maintain accurate billing and resolve payment issues promptly

This integrated approach ensures you have complete visibility into each client relationship, enabling proactive service and strategic business decisions based on comprehensive client data.

> **Pro Tip:** Set up at least one sales page for each of your coaching services. Even if you primarily sell through word-of-mouth, having professional sales pages gives you a link to share with potential clients and presents your offerings in a polished, credible format.

📹 **Video**: Create High Converting Program Sales Pages.

CoachRx User Manual

Quick Start Guide

Table of Contents

Adding Clients

Adding Clients

For coaches who need to get up and running quickly, the Quick Start path focuses on the essential functions to begin working with clients immediately. This streamlined approach recognizes that sometimes you can't wait for perfect system setup - perhaps you have clients ready to start training, you're in a busy season, or you simply want to test CoachRx's core functionality before investing time in comprehensive configuration. The Quick Start path gets you operational within minutes while preserving the option to implement more advanced features later as your schedule allows.

Adding Individual Clients

The client addition process is intentionally simple and fast, designed to get your clients into the system and ready to receive programs with minimal setup time. This approach prioritizes speed over comprehensive data collection, allowing you to capture essential information immediately while gathering additional details organically through the coaching relationship.

The fastest way to get started with a new client:

1. From the Clients tab, click **"Add Client"** to access the streamlined client creation form
2. **Enter the client's name and email address** - these are the only required fields to get started
3. **Leave commission settings** at default for now (you can adjust later if you decide to use the payroll features)
4. Click **"Create"** to immediately add the client to your roster

The system will automatically send an invitation email to your client with step-by-step instructions to download the CoachRx app and set up their account. This automated process eliminates the need for you to manually guide each client through the setup process, saving time and ensuring consistency.

Basic Client Organization

While a comprehensive tagging and organizational system can significantly improve efficiency, you can start with minimal organization and expand your system as needed. The key is getting clients into the platform and programs delivered rather than spending hours on perfect organization that can be refined later.

While a comprehensive tagging system can wait, use these basic organization techniques:

1. **Use the search function** to quickly find specific clients without scrolling through long lists
2. **Sort clients by name or recently added** to easily locate new clients or find someone alphabetically
3. **Create a simple "Priority" tag for clients** who need immediate attention or have urgent deadlines
4. **Consider basic groupings** like "New Clients" or "Current Programs" to help with daily workflow

Remember that you can always expand your organizational system later as your client base grows and you become more familiar with CoachRx's full capabilities.

Client Communication Basics

Clear communication expectations prevent confusion and ensure clients know how to reach you and receive their programs. Since you're starting quickly, focus on establishing the essential communication channels rather than comprehensive onboarding documentation that can be refined over time.

Establish clear communication channels:

1. **Let clients know you'll be using CoachRx for all program delivery** to set clear expectations about where they'll find their workouts and how they'll communicate with you
2. **Instruct them to download the mobile app** when they receive the invitation email, emphasizing that this is their primary access point for programs and communication
3. **Explain that they can message you directly through the app** for questions, concerns, or program feedback, eliminating confusion about communication channels

4. **Set expectations for your response times** (e.g., "I'll respond to messages within 24 hours during weekdays") to manage client expectations and establish professional boundaries

   Pro Tip: Send a short welcome message to each new client after they accept their invitation. This personal touch helps bridge the gap between sign-up and their first program delivery.

📹 **Video**: Can you Onboard your clients in 10 minutes or Less

Essential Client Data

While the comprehensive approach includes detailed assessment protocols, the Quick Start path focuses on collecting only the most essential client data to begin effective programming. This streamlined assessment process recognizes that perfect data collection shouldn't prevent you from starting to help your clients. You can always gather more detailed information over time, but having basic parameters allows you to create safe, effective programs immediately while building the coaching relationship that makes comprehensive assessment more valuable.

Minimum Viable Assessment

The concept of "minimum viable assessment" borrows from startup methodology - gathering just enough information to create a functional program while avoiding analysis paralysis. This approach prioritizes getting clients moving safely over perfect data collection, recognizing that you'll learn more about your clients through their responses to initial programming than through extensive upfront testing.

Gather these key data points before designing your first program:

1. Basic Body Metrics - These fundamental measurements provide the baseline information needed for safe exercise prescription and realistic goal setting, without requiring specialized equipment or extensive testing protocols.

- **Current weight** - for bodyweight exercise scaling and general health context
- **Height -** for movement assessment and equipment setup considerations
- **Age** - to inform exercise selection and recovery expectations
- **Training experience level** - crucial for determining appropriate program complexity and progression rates

2. **Equipment Access -** Understanding available resources prevents the frustration of prescribing exercises clients can't perform and ensures your programs are immediately actionable rather than aspirational.

- **Have clients update their equipment list in the app** - they can do this themselves, saving you time while ensuring accuracy
- **Identify primary training location** (home, gym, commercial facility, outdoor space) to understand the training environment
- **Note any equipment limitations** that might require creative programming solutions or alternative exercise selections

3. **Training Schedule Realistic scheduling is often more important than perfect programming -** a good program that fits the client's life will always outperform a perfect program they can't consistently follow.

- **Set client's available training days** in their profile to avoid scheduling conflicts
- **Note preferred training times** if relevant to your coaching style or their consistency
- **Understand weekly frequency constraints** - how many days they can realistically commit to training

4. Core Movement Screening - While comprehensive movement assessment is valuable, a basic screening can identify red flags and obvious limitations that need immediate attention or modification in programming.

- **Note any pain points or movement limitations** that require immediate program modifications
- **Identify obvious mobility restrictions** that will affect exercise selection
- **Document** previous injuries and any ongoing rehabilitation needs or movement restrictions

Setting Initial Priorities

Effective programming requires focus, but initial priorities don't need to be exhaustively detailed. Start with broad, achievable priorities that can be refined as you learn more about your client's responses and preferences through the coaching process.

Create a simple framework for your first program:

1. **Click the ⚠ icon** in the sidebar to access the priority management system
2. **Add 2-3 primary focus areas** to maintain focus without overwhelming complexity
3. **Keep priorities broad initially** with clear, actionable focus points such as:
   - "Build consistency with 3x/week training"
   - "Develop basic strength in fundamental movements"
   - "Improve movement quality and confidence"
   - "Establish sustainable workout routine"
4. **Refine and expand priorities** after observing initial client response over 2-4 weeks of programming

Creating a Simple Training Split

Your initial training split should prioritize simplicity and sustainability over optimization. A simple, consistent structure that clients can follow reliably will produce better results than a complex program that confuses or overwhelms them.

Establish a basic structure without detailed periodization:

1. **Consider the client's available training days** and create a realistic weekly structure
2. **Create a simple training split** that makes sense for their experience level:
   - **Full body** (ideal for 2-3 training days, beginners, or time-constrained clients)
   - **Upper/Lower** (works well for 3-4 training days, intermediate experience)
   - **Push/Pull/Legs** (better for 3-6 training days, more experienced clients)
3. **Assign a general focus to each training day** to maintain structure and balance
4. **Start with a 2-week program** to allow for quick adjustments based on client feedback and response

   Pro Tip: For new clients, prioritize learning their response to training over complex programming. A simple but consistent approach in the first few weeks provides valuable data that will inform your more detailed programming later.

📹 Video: How Coaching Assessments Build Trust and Results

Quick Program Design

Quick Program Design

The *Quick Start* approach to program design focuses on essential functionality to get effective workouts to your clients as quickly as possible. This streamlined process eliminates the complexity of advanced programming features while maintaining the core functionality needed to deliver professional, effective training programs. The goal is to get your clients moving with well-structured workouts immediately, rather than spending hours perfecting program design systems that can be refined later.

Basic Calendar Navigation

Efficient calendar navigation is fundamental to quick program design. Mastering these basic functions will significantly speed up your workout creation process and help you visualize client training patterns without getting lost in complex interface features.

Master these essential calendar functions:

1. **Select your preferred view** (Day, Week, or Month) based on your current programming task:
   - **Day view** for focused, detailed workout creation
   - **Week view** for seeing training balance and patterns
   - **Month view** for understanding longer-term progression
2. **Use the date picker** to navigate quickly to specific dates without endless scrolling
3. **Learn these basic keyboard shortcuts** to dramatically speed up your workflow:
   - **Arrow keys**: Navigate between days without using your mouse
   - **Shift+Arrow**: Jump between weeks for faster navigation
   - **Enter**: Add workout to selected day instantly
   - **Tab**: Move between input fields efficiently

These navigation skills become second nature quickly and will save significant time as your client roster grows.

Creating Simple Workouts

The workout creation process should be straightforward and repeatable, focusing on clear communication with your clients rather than complex programming features. This systematic approach ensures consistency in your program delivery while minimizing the time spent on each workout design.

Follow this streamlined workout creation process:

1. **Click the** ⚏ **icon** on your desired training day to begin workout creation
2. **Add a descriptive title** that clearly communicates the session's purpose (e.g., "Full Body Strength - Week 1," "Upper Body Push Focus," "Conditioning Circuit")
3. **Include brief coach notes** explaining the session focus, intensity guidelines, or key coaching points (e.g., "Focus on form over speed today," "Should feel challenging but sustainable")
4. **Skip custom warmups initially** - use simple instructions in coach notes like "5-10 minute general warmup" until you build your warmup library
5. **Add exercises** one by one using the "+Exercise" button, building the workout systematically
6. **Type exercise names** directly or select from the extensive pre-loaded library for instant video demonstrations
7. **Include reps, sets, tempo, and rest** in the description field using a consistent format (e.g., "3 sets x 8 reps, 2 sec down, rest 90 sec")
8. **Use the** ⟲ **icon** to pair complementary exercises when appropriate for time efficiency
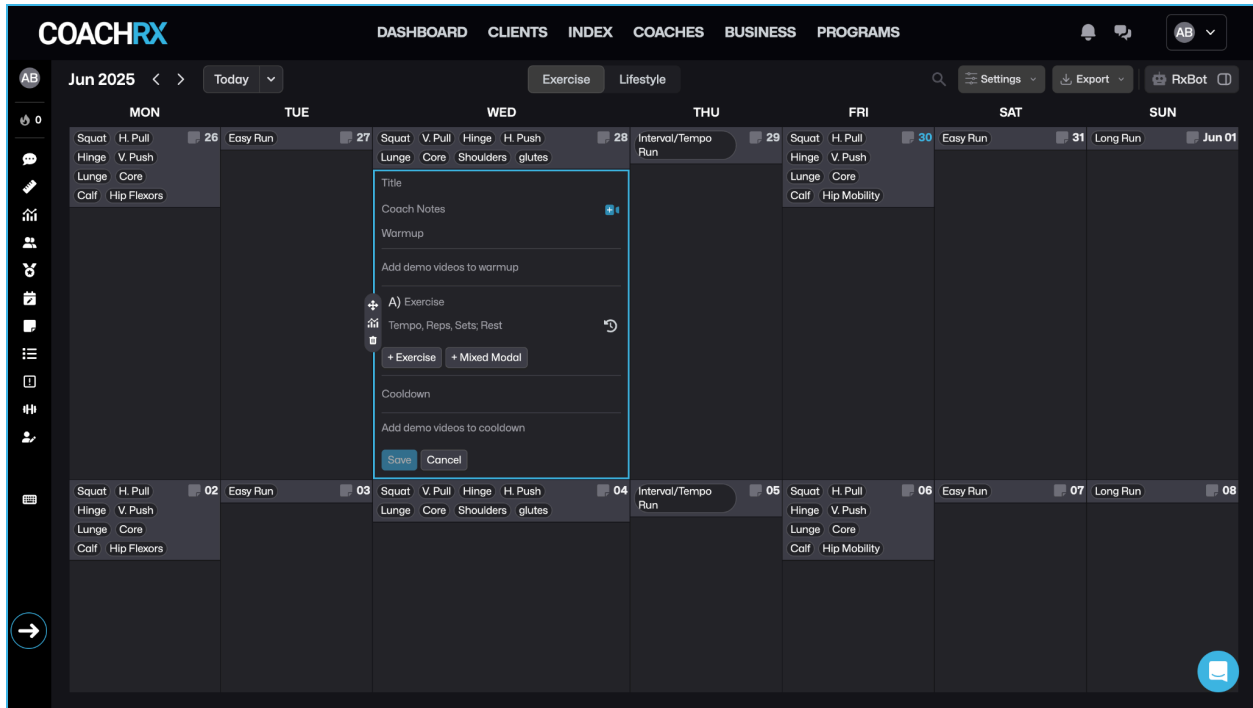
Exercise Demonstration

Clear exercise instruction prevents confusion and reduces the need for follow-up questions, allowing clients to train confidently and safely. Prioritizing exercise clarity over perfect programming complexity ensures better client compliance and results.

Ensure clients understand proper form:

1. **Search for exercises** in the pre-loaded library whenever possible - CoachRx includes 1800+ professional exercise videos

2. For custom exercises, **add a YouTube or Vimeo link** by clicking the ▣◀ icon to provide visual demonstration

This approach ensures clients have the visual guidance they need to perform exercises correctly without requiring extensive written explanations.

Time-Saving Features

Even in the Quick Start approach, leveraging these efficiency features can dramatically reduce the time spent on program design while maintaining quality and consistency across your client programs.

Even in the Quick Start approach, use these efficiency boosters:

1. **Copy & Paste Functionality:**
   - **Use checkboxes** to select similar workouts from previous weeks
   - **Copy** successful workout structures and **paste** to new dates
   - **Modify details** rather than starting from scratch each time
2. **Exercise Search Function:**
   - **Type exercise names** to quickly find them in the extensive pre-loaded library
   - **Use partial names** to see related exercise variations
   - **Bookmark** frequently used exercises for even faster access
3. **Default Templates:**
   - **Browse the Programs section** for pre-built templates created by experienced coaches
   - **Assign complete programs** to clients who fit common training goals
   - **Use templates** as starting points for customization rather than building from scratch

Pro Tip: For your first few weeks of programming, focus on exercise selection and basic progression principles rather than complex workout structures. As you become more familiar with the platform, you can gradually introduce more sophisticated programming techniques.

📹 Video: A 3 Step System for Program Design

Quick Start Guide

Basic Lifestyle Programming

Basic Lifestyle Programming

While comprehensive lifestyle coaching is a cornerstone of the full CoachRx experience, the Quick Start path focuses on implementing simple but effective lifestyle habits that complement your exercise programming. This streamlined approach recognizes that lasting fitness results depend on what clients do during the 23 hours they're not exercising, but avoids overwhelming new clients with complex behavior change protocols. By focusing on a few foundational habits, you can create meaningful lifestyle improvements that support training results without requiring extensive coaching time or client overwhelm.

Simple Lifestyle Prescriptions

The key to successful lifestyle coaching in the Quick Start approach is selecting habits that are both impactful and achievable. Rather than attempting comprehensive lifestyle overhauls, focus on fundamental behaviors that support training recovery, energy levels, and overall health. These basic prescriptions create momentum and confidence that can be built upon as the coaching relationship develops.

Start with these fundamental lifestyle elements:

1. Access the Lifestyle Calendar - The dedicated lifestyle view keeps habit tracking separate from exercise programming, allowing you to focus specifically on behavior change without visual clutter from workout details.

- Open your client's calendar and locate the tab navigation
- Click the "Lifestyle" tab at the top to switch to the lifestyle-specific calendar view

2. **Create Basic Habits -** Focus on prescriptions that directly support training performance and recovery, using the platform's pre-loaded options to save time while ensuring evidence-based habit selection.

- **Click the �•⚫ icon** on any date to begin creating a lifestyle prescription
- Select **"Add Lifestyle"** to access the prescription creation interface
- **Choose from pre-loaded basic lifestyle types** that have been proven effective across diverse client populations

3. Focus on Foundational Habits - These four habit categories provide the biggest impact with the least complexity, addressing the fundamental lifestyle factors that most directly affect training results and energy levels.

- **Hydration targets (daily water intake)** - supports performance, recovery, and energy levels
- **Sleep duration (hours per night)** - critical for recovery, hormone regulation, and consistency
- **Basic protein goals (servings per day)** - supports muscle recovery and body composition goals
- **Daily movement (step counts or active minutes)** - complements formal training with general activity
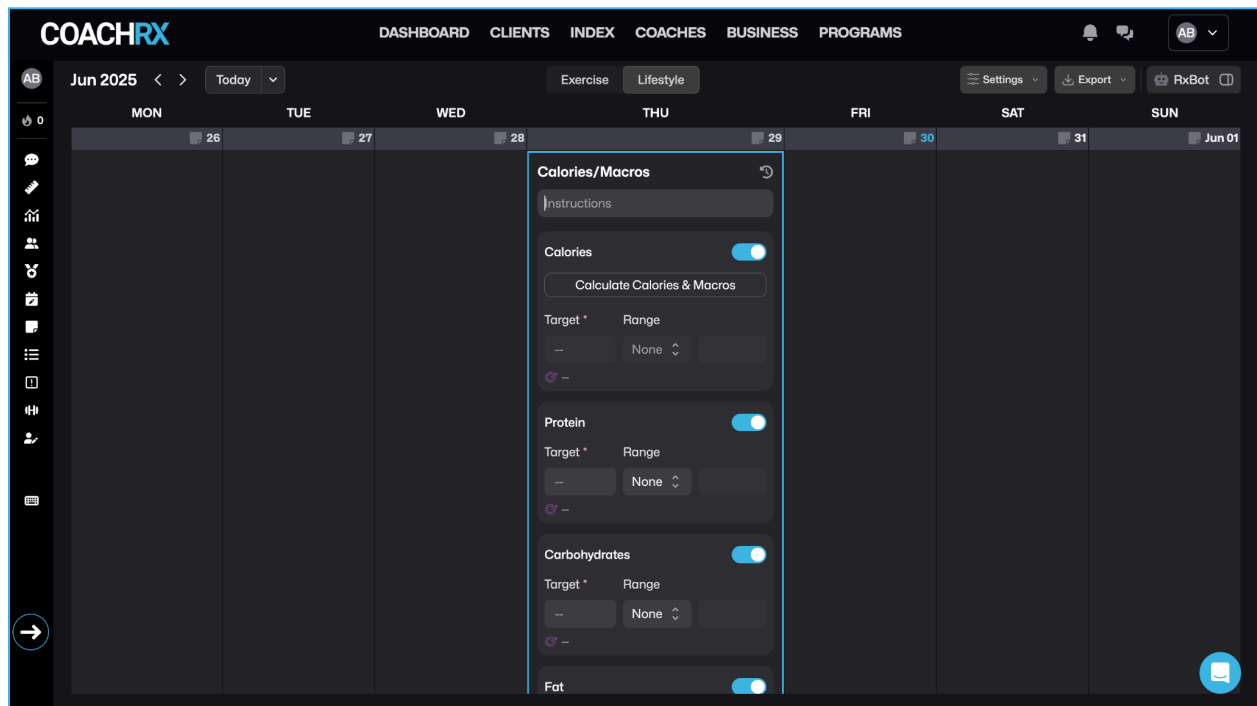
Setting Up Notifications

Consistent habit execution requires strategic reminders that work with clients' daily routines rather than against them. Well-timed notifications can make the difference between habit formation and habit abandonment.

Help clients stay consistent with reminders:

1. **Select appropriate reminder times** (usually evening for reflection-based habits, morning for action-based habits)
2. **Enable daily notifications** for each habit to create consistent cues for behavior

3. **Set duration for 4 weeks initially** - long enough for habit formation without feeling overwhelming
4. **Use simple ranges to allow flexibility (**e.g., 7-8 hours of sleep, 80-100 oz water) that accommodate real-life variability

This approach recognizes that perfectionism often derails habit formation, while flexible targets encourage consistency over rigid compliance.

Basic Compliance Monitoring

Effective lifestyle coaching requires monitoring client adherence without creating administrative burden for you or compliance anxiety for clients. The goal is to identify patterns and provide timely support rather than micromanaging daily behaviors.

Track client adherence with minimal effort:

1. **Check the Activity Feed** for daily updates to quickly scan client compliance across your roster
2. **Note overall compliance percentages** on the Dashboard to identify clients who may need additional support
3. **Message clients who fall below 50% compliance** with encouraging check-ins rather than criticism
4. **Celebrate consistent adherence** with simple encouragement - even emoji reactions can provide meaningful positive reinforcement

Quick Start Lifestyle Benefits

This simplified approach offers several advantages:

- **Low barrier to entry -** clients aren't overwhelmed by complex lifestyle overhauls
- **High impact habits** - focuses on behaviors that most directly support training results
- **Manageable coaching load** - minimal time investment while providing meaningful lifestyle support
- **Foundation for expansion -** successful basic habits create confidence for more advanced lifestyle coaching

Common Quick Start Lifestyle Combinations

Consider these effective starter combinations based on client priorities:

For Energy and Performance:

- 7-8 hours sleep nightly
- 64-80 oz water daily
- 10,000 steps daily

For Recovery and Body Composition:

- Protein at every meal
- 7-9 hours sleep nightly
- 2-3 servings vegetables daily

For Consistency and Momentum:

- 20 minutes daily movement
- Hydration target
- Consistent bedtime routine

Pro Tip: Focus on prescribing behaviors (habits) rather than outcomes. For example, instead of prescribing "lose 2 pounds this week," prescribe "eat a protein source with breakfast daily." This approach gives clients direct control over their success and builds the foundation for sustainable long-term change. This systematic approach to lifestyle programming ensures that your clients develop the daily habits necessary to support their exercise efforts and achieve lasting transformation.

🎥 **Video:** Lifestyle-First Coaching Approach

Advanced Features Overview

Advanced Features Overview

While you're focusing on getting started quickly, it's helpful to be aware of some key advanced features you can explore later as your comfort with the platform grows and your business needs evolve. These powerful tools can dramatically enhance your coaching efficiency and client experience, but they're not necessary for immediate success. Think of this as a preview of what's possible as you scale your coaching business and seek ways to provide even more value to your clients.
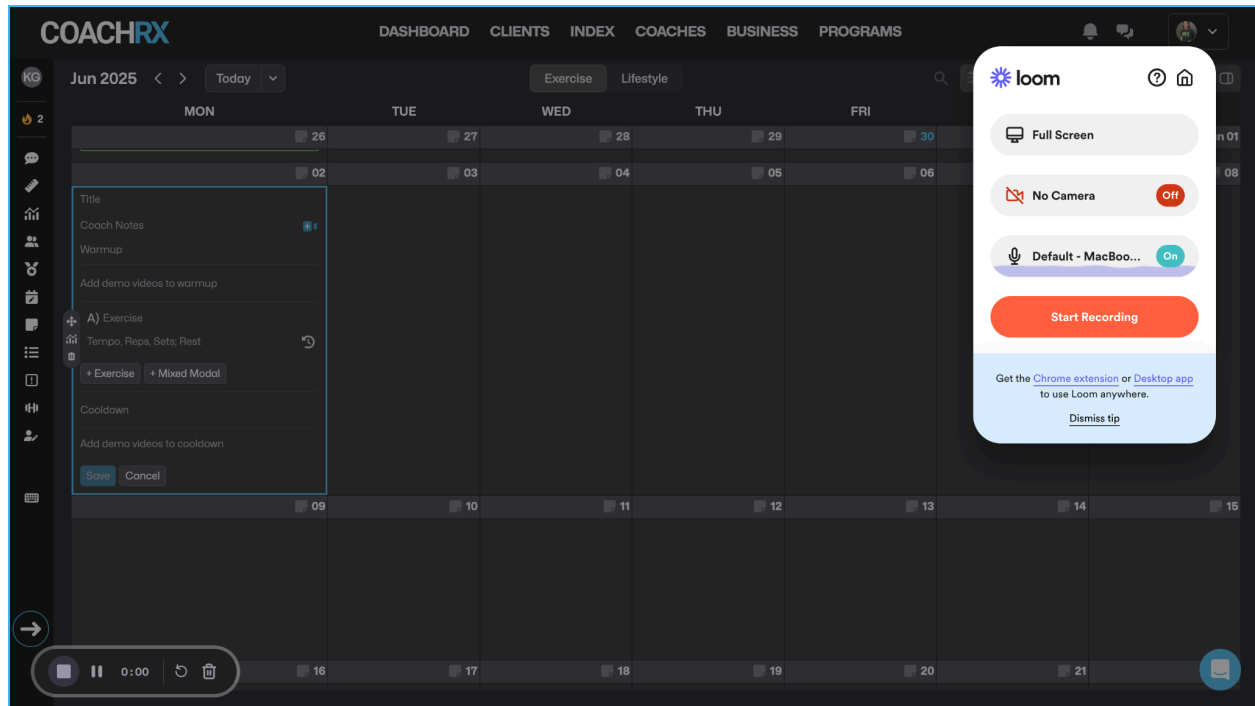
Integrations

CoachRx's integration ecosystem extends the platform's capabilities by connecting with specialized tools that enhance specific aspects of your coaching practice. These integrations eliminate the need for separate software subscriptions while creating seamless workflows that improve both your efficiency and your clients' experience.

CoachRx connects with several powerful third-party tools:

1. **Loom Integration:** Personalized Video Communication Video communication transforms the coaching relationship by adding a personal touch that text-based communication simply cannot match. This integration is particularly powerful for remote coaching, exercise feedback, and building stronger client relationships.

- **Record quick video messages** for personalized feedback directly within CoachRx
- **Provide exercise form corrections** by recording your screen while reviewing client workout videos
- **Create motivational check-ins** that feel more personal than text messages
- **Explain complex programming concepts** with visual demonstrations
- **Build stronger relationships t**hrough face-to-face communication even when physically distant

2. Stripe Integration: Professional Payment Processing The Stripe integration transforms CoachRx from a program delivery platform into a complete business management system, handling everything from simple payment collection to complex subscription management.

- **Process payments directly within CoachRx** without redirecting clients to external systems
- **Manage subscription billing automatically** including renewals, failed payments, and upgrades
- **Create professional invoices** with your branding and automated delivery
- **Access detailed financial reporting** for business growth analysis
- **Handle complex pricing structures** including trial periods, discounts, and multiple service tiers

🤖 RxBot - AI Coaching Assistant

RxBot represents the cutting edge of coaching technology, combining artificial intelligence with OPEX coaching principles to dramatically accelerate your program design process. This feature is particularly valuable for coaches managing large client rosters who want to maintain personalized programming without sacrificing efficiency.

When you're ready to speed up your program design:

1. **Access RxBot (🤖) from your client's calendar** by clicking the RxBot button during program creation
2. **Select training days and program duration** based on your client's schedule and current training phase
3. **Choose training intents and provide context** including strength goals, energy system focus, and any specific client considerations
4. **Review and customize the AI-generated program** to align with your coaching philosophy and client-specific needs
5. **Assign directly to your client's calendar** with one click, or save as a template for future use

RxBot's Unique Advantages:

- **Built on OPEX principles** - ensures programs align with proven coaching methodologies
- **Integrates client data** - uses assessment results, goals, and equipment to personalize recommendations
- **Explains its reasoning -** provides educational insights about why specific exercises and progressions were chosen
- **Saves significant time** - reduces program design time from hours to minutes
- **Maintains coaching quality** - serves as an intelligent assistant rather than replacement for your expertise
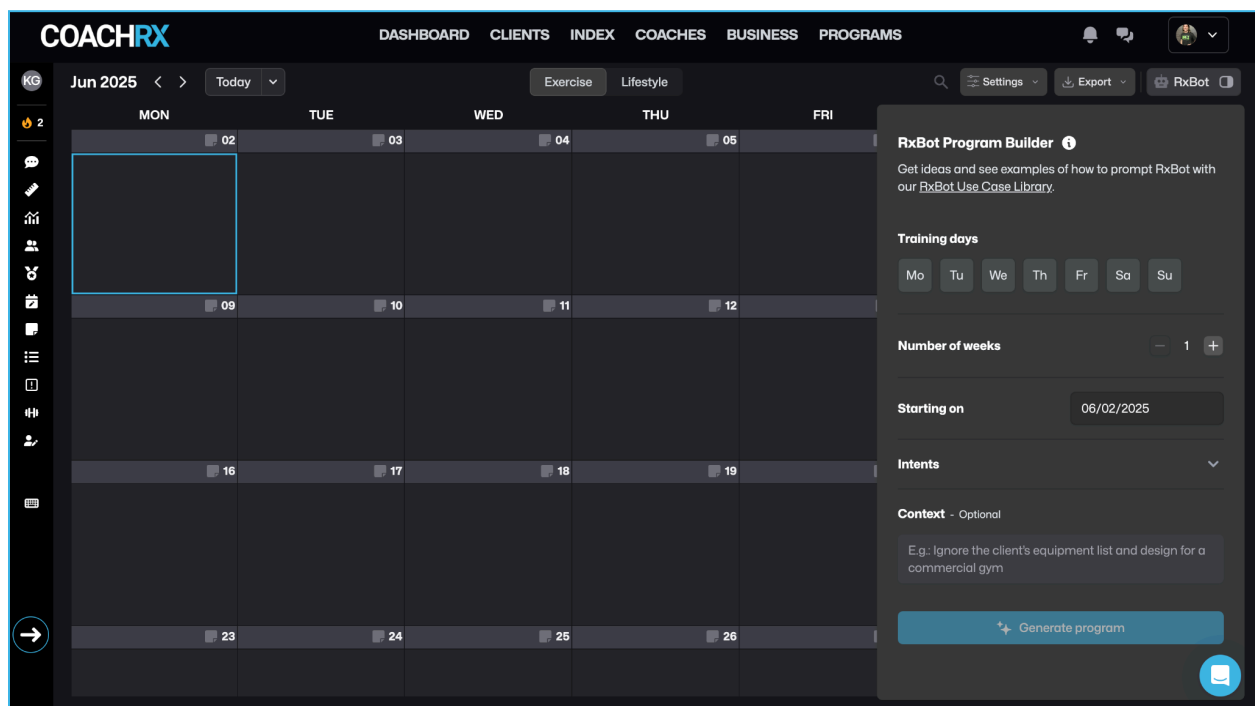
Mobile App Experience

Understanding your clients' mobile app experience helps you optimize your coaching approach and set appropriate expectations for client engagement. The mobile app is where your clients spend most of their time interacting with your programming, so familiarity with its features enhances your ability to guide client success.

Understanding what your clients see in their app:

1. Workout Access and Tracking

- **Complete workout interface** with exercise videos, rep counts, and progress tracking
- **Timer functions** for rest periods and timed exercises
- **Weight and rep logging** with automatic progression suggestions
- **Workout history** showing completed sessions and personal records

2. Communication and Notifications

- **Direct messaging** with you for questions and feedback
- **Smart notifications** for scheduled workouts and lifestyle reminders
- **Activity updates** that keep you informed of their progress automatically
- **Consultation scheduling** if you've enabled booking features

3. Progress Tracking and Motivation

- **Upload videos** for form feedback and coaching review
- **View progress metrics** over time with visual graphs and charts
- **Track lifestyle habits** with simple check-in systems
- **Access educational resources** you've uploaded to their document library

4. Lifestyle Integration

- **Lifestyle prescription tracking** with customizable reminder systems
- **Photo uploads** for nutrition accountability
- **Habit streak tracking** for motivation and consistency
- **Weekly check-in forms** for comprehensive feedback

    Pro Tip: As you become more comfortable with the platform, start exploring these advanced features one at a time. Each can significantly enhance your coaching efficiency once mastered.

Video: CoachRx Client Experience Demo

Quick Start Guide

Transitioning to Comprehensive Setup

Transitioning to Comprehensive Setup

Once you're comfortable with the basics, you can gradually implement more comprehensive features to create a complete coaching system.

Phase 1: Enhance Your Client Management

1. Implement a Complete Tagging System
   - **Create tags** for programming days, client goals, and experience levels
   - **Apply tags** systematically to your entire client list
   - **Begin batching clients** for more efficient programming

2. Expand Client Assessment
   - **Complete full *OPEX Body, Move,* and *Work* assessments**
   - **Add detailed priorities** based on findings
   - **Update client priorities** after reviewing assessment data

Phase 2: Build Your Resource Library

1. Develop Your Exercise Library
   - **Add custom exercises** with video demonstrations
   - **Categorize** by movement patterns
   - **Create exercise progressions** for different levels

2. Create Workout Templates
   - **Build** standard warmup sequences
   - **Design** cooldown protocols
   - **Develop template workouts** for common goals

3. Establish Lifestyle Types
   - **Customize lifestyle prescriptions** beyond basics
   - **Create educational materials** for each habit
   - **Develop progression systems** for habit mastery

Phase 3: Implement Business Systems

1. Set Up Payment Processing
    - **Connect** Stripe account
    - **Create** products and pricing plans
    - **Set up** recurring subscriptions

2. Develop Legal Documents
    - **Create** contract and waiver templates
    - **Send** to existing clients
    - **Implement** in new client onboarding

3. Create a Storefront
    - **Build** your coaching services page
    - **Add** product offerings
    - **Launch** public sales pages

Phase 4: Optimize Programming Systems

1. Implement Periodization Structures
    - **Create long-term plans** for all clients
    - **Develop** detailed short-term plans
    - **Establish c**onsistent daily plans

2. Enhance Client Communication
    - **Set up** weekly check-ins
    - **Establish** monthly consultation schedules
    - **Create** custom client reports

3. Leverage Advanced Features
    - **Explore RxBot** for program design assistance
    - **Implement** integrations with third-party tools
    - **Customize** advanced metrics tracking

Pro Tip: Don't try to implement everything at once. Choose one element from each phase to focus on each week. Gradual, consistent implementation will lead to better long-term systems than trying to overhaul everything simultaneously.

Conclusion

Conclusion

The **_Quick Start_** approach to CoachRx allows you to begin working with clients immediately while setting the foundation for a more comprehensive system in the future. By focusing on essential features first, you can become comfortable with the platform while delivering effective coaching from day one.

Remember that mastering CoachRx is a journey. Start with the basics outlined in this guide, then gradually implement more advanced features as you grow more familiar with the platform. Over time, you'll develop a coaching workflow that allows you to maximize client results while maintaining a healthy work-life balance.

For additional support:

- Access the **Help Center** at help.coachrx.app
- Watch **tutorial videos** at tutorials.coachrx.app
- Contact **support** at support@coachrx.app

Thank you for choosing CoachRx as your coaching platform!