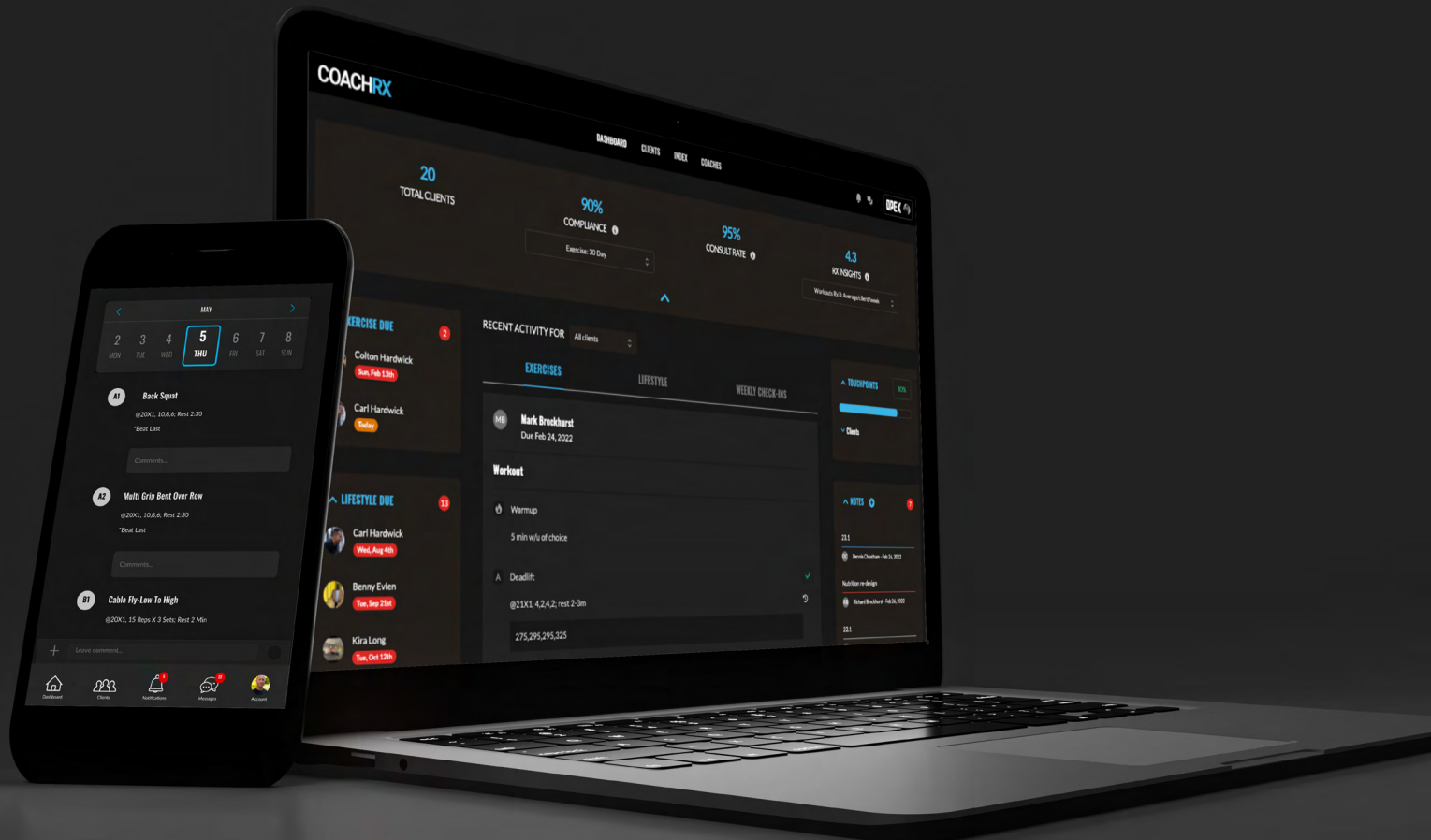# COACH**RX**
BY OPEX FITNESS

DESIGN BETTER WORKOUTS, FASTER WITH COACHRX

COACHING SOFTWARE TO INCREASE YOUR EFFICIENCY & SCALE YOUR BUSINESS

To grow a successful coaching business you need to balance both the art of coaching—delivering high quality programs, building relationships, and getting great results—with managing your client list, finances, marketing, and operations. Wearing multiple hats can make it feel like there's never enough hours in the day to get everything done, which is why efficient systems and a powerful software tool are essential if you want to continue to grow.

We built CoachRx to help with just that: so you can seamlessly manage both your clients' fitness AND the health of your coaching business in one place. In fact, we're so confident that our systems will change the future of your business, that we offer a **free 14 day trial** so you can experience the difference for yourself.

But before you start your trial, we want to make sure you're set up to really make the most of your 14 days. This quick guide will walk you through how to set up CoachRx most effectively, so you can hit the ground running! We'll walk you through the following steps:

YOUR COACHRX CHECKLIST

STEP ONE
☐ **COMPLETE YOUR COACH PROFILE**

STEP TWO
☐ **BUILD OUT YOUR INDEX**

STEP THREE
☐ **GET FAMILIAR WITH YOUR DASHBOARD**

STEP FOUR
☐ **ADD & VIEW YOUR CLIENTS**

STEP FIVE
☐ **ADD CLIENT DETAILS AND DATA**

STEP SIX
☐ **DESIGN AN EXERCISE PROGRAM**

STEP SEVEN
☐ **DESIGN A NUTRITION & LIFESTYLE PROGRAM**

STEP EIGHT
☐ **SET A CONSULTATION CADENCE**

STEP NINE
☐ **SET UP YOUR BUSINESS SUITE**

START YOUR FREE TRIAL AFTER REVIEWING THE STEPS IN THIS GUIDE SO YOU CAN TAKE ACTION IN YOUR VERY OWN COACHRX ACCOUNT.

WHEN READY, START YOUR FREE TRIAL

SETTING UP YOUR ACCOUNT

To maximize your efficiency in CoachRx, you have to ensure the system is personalized for you. In this section, we will break down your Coach Profile and Index to ensure you set them up to match your coaching style.

The **Coach Profile** allows you to add your coaching business details and update your notification settings to match your workflow.

Follow these steps to set up your profile:

☐ **Consultation Link**

This is where you will plug in your personal consultation link so clients can book their consultations. Although we recommend a monthly consultation with each client, it is up to you and your best practices to decide how often you perform these with your clients. This link will show in your client's mobile app, allowing for easy booking.

☐ **Organization**

In this section you will name your organization (your coaching business name), include your url, and decide how many touchpoints you require as a minimum per client. A touchpoint is counted each time a client is messaged or they receive a comment through an Rx. You can also add your organization photo and footer information that will display on contracts and waivers you send.

If you're a solo coach-owner then these settings will only apply to you, but if you have other coaches working underneath you, these settings will also be applied to their account. Only admins can adjust organization settings if you are part of a team.
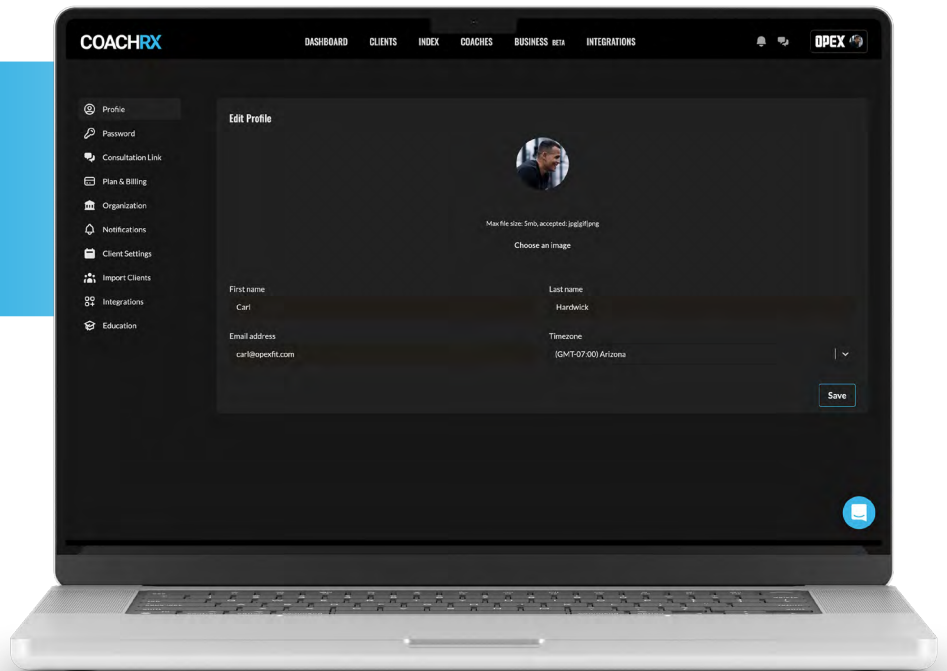
☐ **Notifications**

Personalize your notification preferences in this section to match your workflow. You can personalize what notifications you receive, as well as when you would like CoachRx to send you notifications.

☐ **Client Settings**

Although you can set organization touchpoint minimums in the organization section, a coach can set their own touchpoint goal here, but this cannot be lower than the organization minimum. In this section you can also adjust dashboard exercise due settings, as well as adjust how many days your clients can see their training days ahead of time.

☐ **Importing Clients from Other Platforms**

We have made it easier to bulk import clients from other systems. Simply download the provided CSV, watch the instructional video, fill in required fields as well as any non-required fields you desire, upload the CSV and CoachRx will run a background job and notify you via email once the job is complete. All invitation emails will automatically be sent to your clients to get them set up in the mobile app.

☐ **Integrations**

Expand the value of your coaching service and connect your CoachRx account with our available integrations, including video messaging through Loom, payments through Stripe, and blood biomarker testing through InsideTracker.

☐ **Education**

Here you'll find free LearnRx courses you can use to expand your coaching knowledge and improve your program design efficiency and quality.

COACHRX
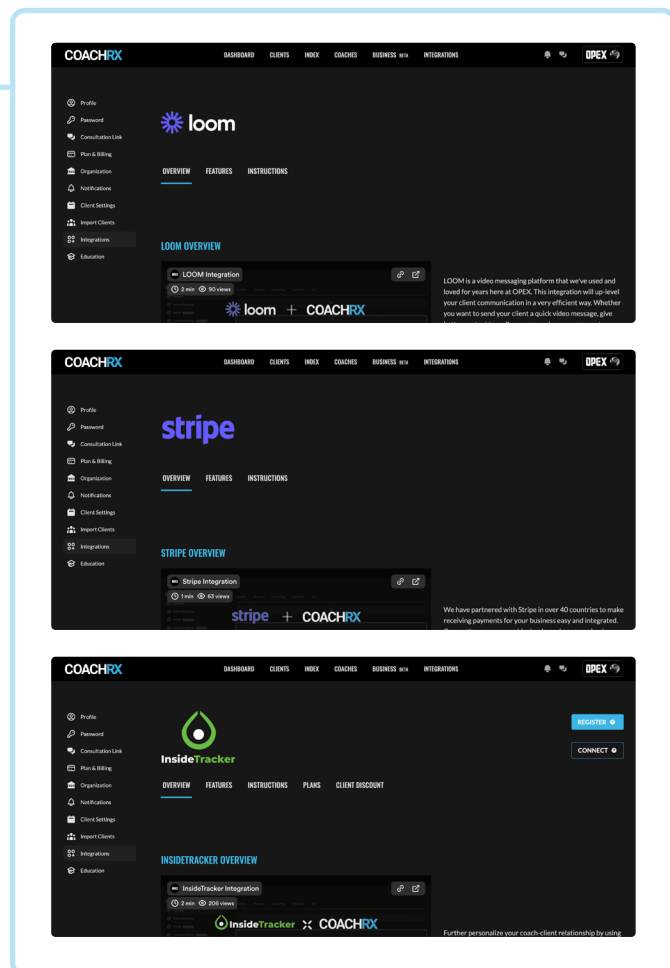
STEP TWO:
BUILD OUT YOUR INDEX

The Index is the hub of your coaching business and is where you can create and store important templates, programs, and library resources that can be assigned across your entire client list.
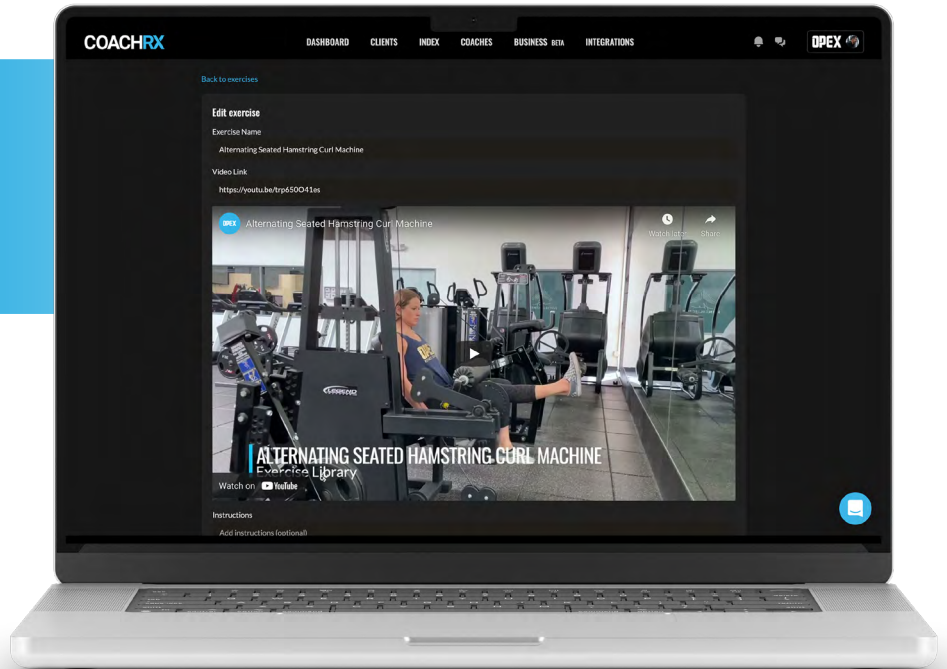
☐ Exercises

Your exercise library is shared across your coaching business. You can add a new exercise from this screen or right in your calendar, and these videos will appear when you program an exercise. OPEX has provided thousands of preloaded, high quality exercises to get you started.

☐ Lifestyle

The ability to prescribe lifestyle Rx's is another feature that sets CoachRx apart from other coaching platforms. This library feature is where you will store lifestyle types that can be programmed from your client's calendar. We have included OPEX Basic Lifestyle Guidelines as lifestyle types to get you started, but you can add prescriptions to these or add your own types and prescriptions.

☐ Warmups & Cooldowns

The warmups and cooldowns library is where you can add commonly used sets that can be programmed for all your clients. You can create these here or in the exercise calendar.

COACHRX

☐ **FME Sets**

FME stands for Fitness Monitoring Exercises. As well as the FMEs provided, you can create custom and commonly used 1RMs, energy systems, and other tests as sets and assign them to clients from this page.

☐ **Programs**

Use these sections to create commonly used exercise programs that you can assign to multiple clients. This is an especially beneficial feature if you offer group or templated programs as a part of your coaching business. As well as standard programs that can be assigned to begin at any date, you can program live programs if you want to take multiple clients through the same program on the same dates.

> ***Pro Tip:*** *Access 20 free program templates written by top fitness coaches inside the Programs Index. Use these for creative inspiration or assign them to your clients and adjust them as needed.* **Click here to access these free programs.**

☐ **Weekly Check-In Template**s

Assigning weekly check-ins will help you streamline communication and feedback between you and your clients. The weekly check-in can be assigned to each client from the Consultation tab in the calendar view. We have provided a default check-in template that you can use, but you can also create personalized check-ins.

☐ **Intake Forms**

To prepare for a better initial consultation or to better understand where incoming clients sit, an intake form is in each client's app under their Account. We have provided a default intake form, but you can also personalize this intake form to work for your coaching practice.

☐ **Documents**

You can upload documents that your clients can access at any time through the app. You can add educational material, commonly asked questions, your client SOP document, and other beneficial documents for your clients in this section.

MANAGING YOUR CLIENTS

<div style="background:#4db8e8;">

STEP THREE:
GET FAMILIAR WITH YOUR DASHBOARD

</div>

Your Dashboard will be your most frequently visited page in CoachRx. This page is set up with program design review and communication efficiency in mind, and we encourage you to click around and get familiar with how it flows.

> **Pro Tip:** *Let's take a moment to discuss the notifications and messages page. First, an efficient coach is a proactive one. It is very easy to reload and check notifications and messages whenever you pull up CoachRx. Resist the temptation! Instead, we recommend planning your communication. Block out time in your calendar for when you review results, message clients, and clear notifications.*
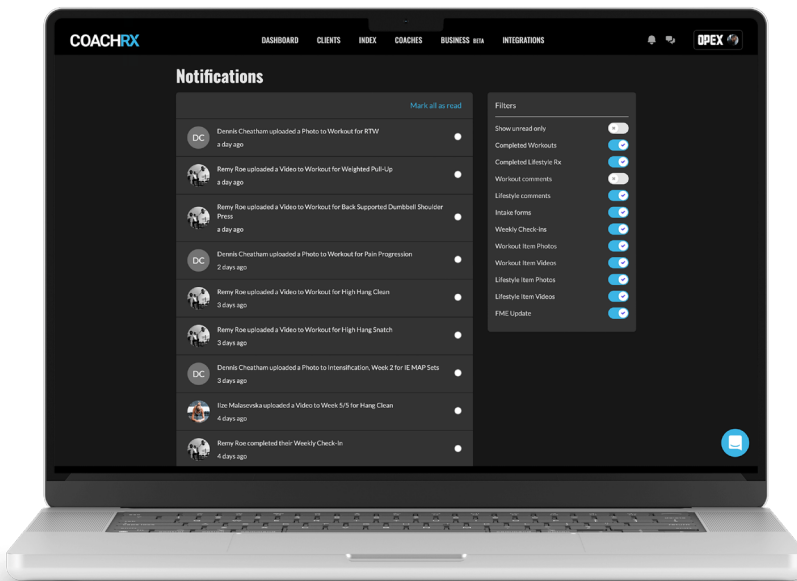
☐ Notifications

When viewing notifications, you can either have a quick look by pressing the bell icon or you can visit your notifications center by clicking "see all" to review and action on your notifications. Adjust the filters section to turn filters on/off to sort notifications to your liking.

☐ Messages

This experience is very similar to notifications. You can quickly view your **messages** when you click the message icon, or you can click "see all" to go to your messages center to review and take action on all messages.

Messages can also be sent from the client calendar, making it easy for you to communicate with your client while looking at their profile and program.
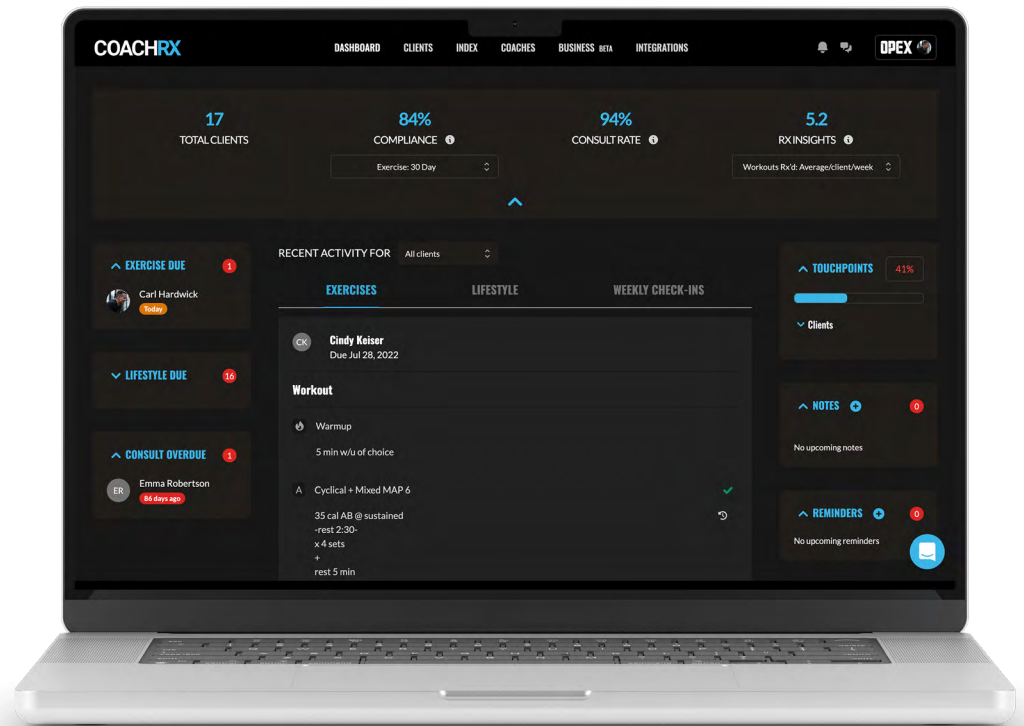
COACHRX

There are 4 major sections in the Dashboard that we want you to get familiar with:

1. Metrics

2. Priorities

3. Communication

4. Activity Feed

☐ Metrics

Here you will find your personalized coach metrics. You will find your total clients and your exercise, lifestyle, and total compliance with the ability to view all-time, 90, 30, and 7-day trends. You will also find your consult rate across all clients. This is the percentage of clients that have had a consultation within the last 60 days. You can also find Rx insights, which gives you a look into:

- Exercise Programs Rx'd-all-time
- Exercise Programs Rx'd, average per week
- Workouts Rx'd-all-time
- Workouts Rx'd-this week
- Workouts Rx'd-average per client per week
- Lifestyle Programs Rx'd-all-time
- Lifestyle Programs Rx'd-this week

You can utilize these metrics to improve your efficiency. You can look at your compliance to understand if you are overprescribing, consult rate to understand how connected you are to your clients, and your Rx insights to give you an objective look at your design habits.

COACHRX

☐ **Priorities**

This section highlights due exercise and lifestyle programs, so you never forget to program for a client. It also highlights overdue consults.

☐ **Communication**

Communication is key in coaching. Being proactive is important when creating an efficient communication strategy. In this section, you will see the percentage of clients that you've had your goal touchpoints for the week with, along with any upcoming notes and reminders. It is one thing to view this information, but you can also take action on this screen as well. You can add touchpoints by commenting on training & lifestyle Rx's and adding notes and reminders.

☐ **Activity Feed**

Last, but not least, you have your activity feed. This feed is a great efficiency tool for your review sessions. You can view and comment on exercise, lifestyle, and weekly check-ins from this feed.

When used effectively the Dashboard can create great efficiency in your day-to-day coaching practice. Two important takeaways are:

➡ *Being proactive with communication by internationally having design and communication time in your calendar*

➡ *Using the metrics section as a tool to assess your coaching practice*

The second most visited screen you will experience is your **Clients** section. This page has a reminder of overall coaching metrics, client-specific metrics, and tags. How you use this page will set you up for program design efficiency.
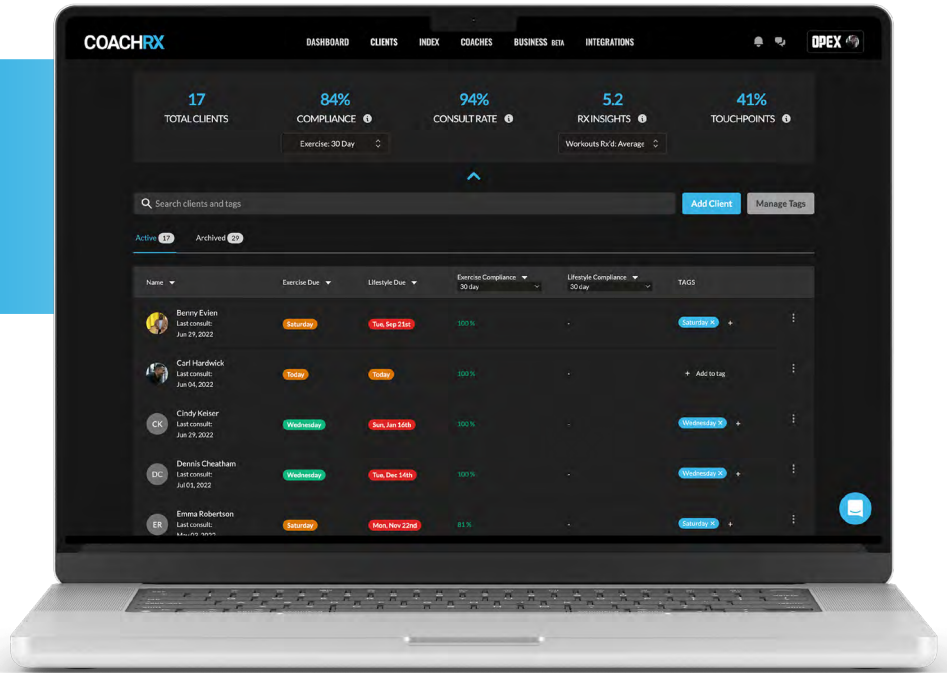
☐ Adding Your First Client

Adding clients to CoachRx is easy! Simply click the "Add Client" button from this page, fill in a few details, and the client will be added to your list as "Pending". They will receive an email to download the CoachRx client app and create their account, where they can fill out their intake form and equipment lists. You can also add coach commission types and rates here if you want to take advantage of the payroll feature.

☐ Organizing Your Clients with Tags

We highly recommend using the tag feature on this page. It is easy to fall into the habit of simply going from top to bottom on your client list until you design all exercise and lifestyle programs, but this means that the client that starts with the latter part of the alphabet will get the worst designs. Instead, we recommend sorting your clients by tags using days of the week you design.

When tagging your clients by days of the week consider:
- Logistics for your clients:
    - When is the best day of the week for them to receive a new design?
- Logistics for you:
  - What 'type' of clients do you want to design for on what day?
    - *For example, 4 days per week clients on Monday. Clients with aerobic-biased goals on Wednesday.*
  - How many clients do you want to design for each day?
    - *For example, 5 clients on Monday because you are at your freshest or 10 clients Friday because you have more time.*

STEP FIVE:
ADD CLIENT DETAILS
& DATA

The calendar view is where you can access and manage each client's details and data, along with delivering their program design. Simply click on the client's name from the Clients screen to access this.
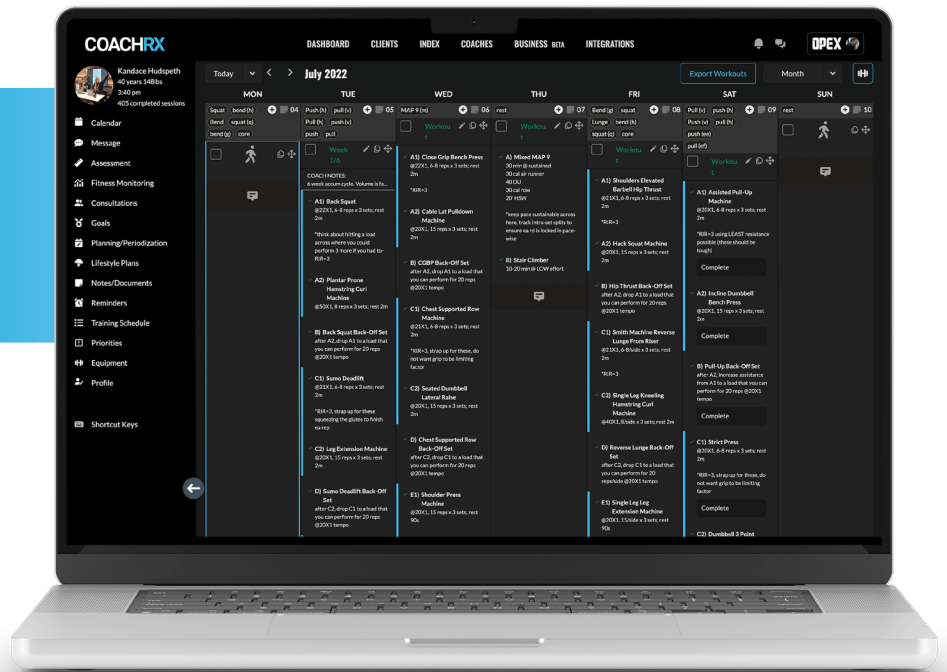
The following sidebar sections are important to keep updated so you have easy access to relevant details when programming:

☐ **Assessment**

In this section, you will include your client's **assessment data** for quick reference. We recommend using the OPEX Body, Move, and Work screen, taught in the **OPEX Coaching Certificate Program (CCP)**.

☐ **Fitness Monitoring Exercises (FMEs)**

You will also have easy access to your client's FMEs and structural balance insights, and can link these to exercises prescribed in the calendar so the data updates automatically. You can also add your own FMEs from here or the Index.

You can view and analyze their FMEs and their scores in various

COACH**RX**
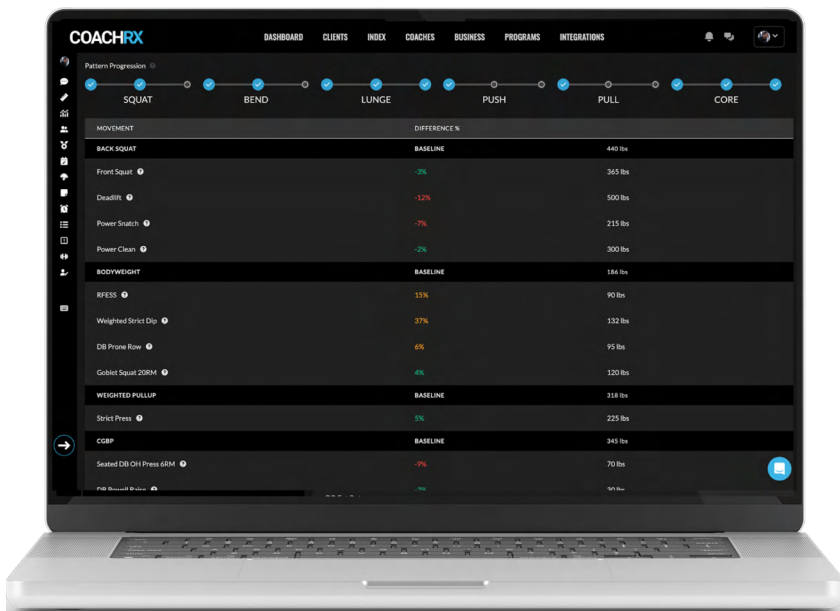
categories such as motor control, strength endurance, maximum contraction standards, and view a structural balance table. The color-coded indicators, including red for underperformance, green for within range, and amber for exceeding standards, offer a quick visual reference for identifying areas of focus.

☐ **Training Schedule**

Update your client's training schedule to understand on/off days for easy planning.

☐ **Equipment**

Ensure every new client updates their equipment list for quick reference when designing training programs. They can update and add new equipment lists through the client app.
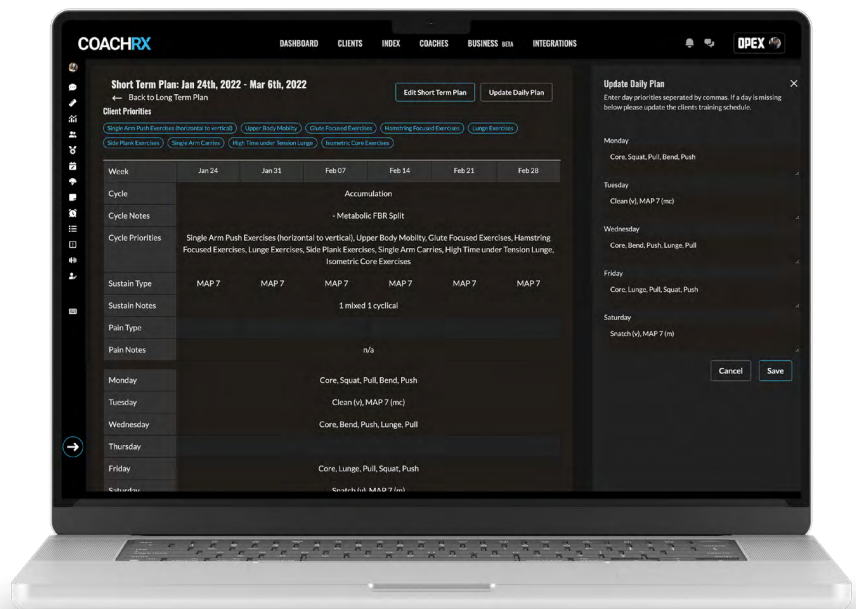
☐ **Priorities**

Priorities ensure you are staying on track with what your client needs based on their assessment and goals. Examples of priorities are "fat loss", "lunge motor control", or "squat max strength".

☐ **Planning/Periodization**

This is where you will build your client's long-term, short-term, and daily plans:

1. Add a **long-term plan**, aka a macrocycle. We recommend building these based on the calendar year for general population clients, and competition seasons for athlete clients.

2. Add **short-term plans**, aka mesocycles. You can build out short term plans for the entire macrocycle, or to keep things simple just start with one for now!

3. Add the **daily plan**, aka a training split, to

each short-term plan. The days displayed will align with the client's schedule. The daily plan is displayed on the calendar at the top of each training day as a reminder of the daily priorities for each client. Use commas to separate daily priorities to separate tags in the calendar. Your client will also see these tags in their app to help them understand what they are working on day-to-day.

Pro Tip: You can easily toggle to your client's short term plan from the calendar for a quick view by using the shortcut keys (see the icon on sidebar) or the dropdown menu on the top right of the calendar. You can also export workouts into a TXT file using the Export Workouts button.

START YOUR FREE TRIAL AND INPUT YOUR CLIENT DATA IN COACHRX

☐ Notes/Documents

Add relevant notes and attach important documents to your clients' profiles. You can create and share notes to track progress, record observations, or provide additional guidance. Additionally, you can upload documents that are accessible to clients, making it convenient to share resources, training materials, or educational materials.

☐ Reminders

Stay on top of important tasks and events. The client calendar provides a visual representation of your clients' training schedule, with white cells indicating available training days and gray cells representing rest days. By setting up reminders, you can ensure that both you and your clients are aware of upcoming consultations, assessments, or other critical events.

COACHRX

☐ Client Profile

The client profile section offers comprehensive details about your clients, including their demographic information, location, time zone, visibility settings, and preferences. The completed intake form is saved to the client profile for future reference.

Progress pictures are also displayed here as an effective way to visually track your clients' transformation and progress. The CoachRx mobile app provides a dedicated space for clients to upload progress pictures, allowing you to monitor their development and make informed adjustments to their training plans.

Billing information and history can also be accessed within the client profile. This includes details of past transactions, invoices, and payment records. Having this information readily available ensures transparency and allows for seamless billing and financial management.

To recap, we recommend:

➡️ *Assessing your clients and keeping those sections updated to always have an eye on where they are.*

➡️ *Keeping logistics like equipment list and schedule updated for quick reference during design.*

➡️ *Using planning and periodization to have a plan for each client and daily plans filled as an in-calendar reminder for daily priorities.*

COACHRX

PROGRAM DESIGN EFFICIENCY

Program design efficiency. These have been buzz words for the last few years, but for good reason, as many coaches struggle on this front. In this section, we will discuss best practices in CoachRx that can increase your exercise programming efficiencies. Remember, you must personalize the system to meet your productivity needs and systems.

STEP SIX:
DESIGN AN EXERCISE PROGRAM

Now it's time to put pen to paper...or in this case, fingers to keyboard!
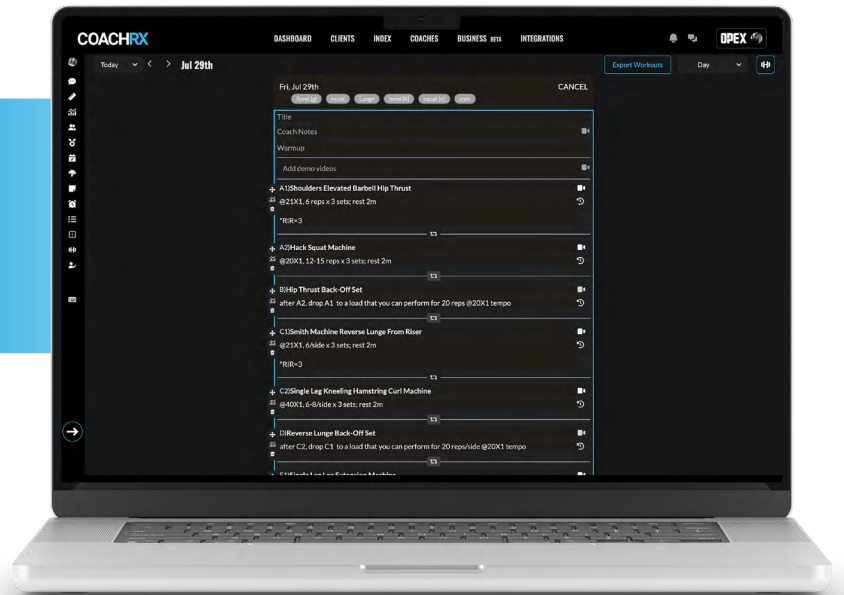
Designing Your First Workout

☐ Click the dumbbell icon to add a new workout

☐ **Title** the training day. This keeps you on track week-to-week, as well as keeps your client looped in on where they are in their training cycle.

☐ Add **Coach Notes** to give context to your client regarding their program. You can also add a video here to save time and offer a personal touch using the **LOOM integration**.

☐ Add a **Warmup**, either entering the name of an existing warmup from your Index or creating a new warmup. We highly recommend saving each warmup you create and having a sensible naming convention so you do not have to recreate the wheel each session.

☐ If you use the **Daily Plan** feature, your daily priorities are conveniently located at the top of each daily cell as a quick reminder and to keep you on track week-to-week.

☐ Add a new **Exercise** or **Mixed Modal** piece, guided by the Daily Plan.

☐ For Exercises, use the exercise box to save time not having to fully type out exercises that are already in your exercise library. Add tempo, reps, sets, and rest to the description box. Join exercises using the superset icon and drag to reorder as needed.

☐ For Mixed Modal pieces, write the description of the piece and then add any necessary demo videos you want the client to see.

☐ Add a **Cooldown** if desired. Just like warmups, it is recommended to save these to your Index.

What About Template or Group Programs?
If you offer templates or group programs you can use CoachRx to deliver programs to multiple clients from the Programs feature in the Index. This includes the ability to offer standard programs that can be assigned to begin at any date, along with live programs that multiple clients can follow on the same dates. Check out this **Programs article** *for more tips.*

Plus, you can find 10 free program templates written by top fitness coaches in the Programs Index. **Click here** to access them for program design inspiration for energy systems training, skill development, and strength progression.

Program Design Pro Tips:

As a rule of thumb, we recommend designing seven days at a time. This allows you to review the previous week's design and give feedback in a timely manner, adjust any progressions that did not go according to plan, and create consistency in your coaching practice.

It is up to you what view you choose to design in: **Day, Week, or Month view**. If you are starting a new progression that is not connected to the last progression, programming in the Day or Week view may be okay if you prefer a less busy screen. For continued progressions we recommend the Month view, so you can reference the previous week.

If you are continuing a progression, we recommend using the mass **copy & paste** feature to avoid having to rewrite each session. Once you have copied and pasted, or have started your new week from scratch, it's time to get to work.

Lastly, if you have to take your hands away from the keyboard for each action you take in design, this can greatly increase the time it takes you to write a program. **Shortcut keys** are designed to avoid this time suck. Get used to using these to speed up your design.

NUTRITION & LIFESTYLE PROGRAMMING

As well as creating personalized exercise programs, CoachRx also enables you to design custom nutrition and lifestyle programs for your clients, so you can offer them an all-in-one coaching service.

**STEP SEVEN:
DESIGN A LIFESTYLE
PROGRAM**

Designing lifestyle plans is not meant to be a week-to-week effort on your part. Look at designing lifestyle plans as creating great habits with your clients. Do not get this confused as a "set it and forget it" task in CoachRx. Rather, set it, check in on it weekly, and refine at each monthly consultation.
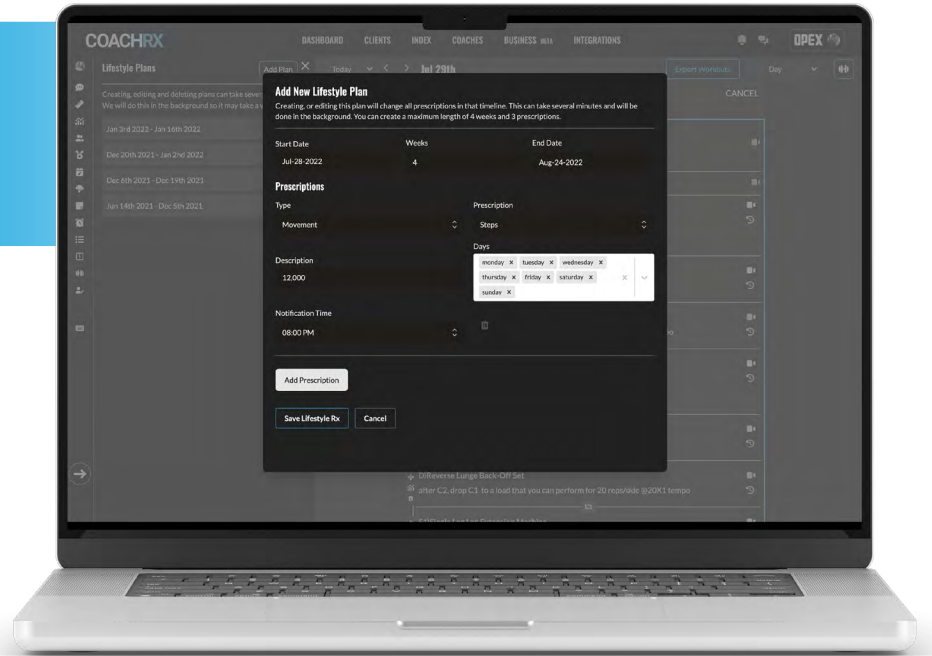
Designing Your First Lifestyle Plan

- ☐ Ensure you have the lifestyle type set in your Index

- ☐ Click the lifestyle icon in the sidebar from the client's calendar

- ☐ Click Add Plan

- ☐ Create the start date and length of plan in weeks.

- ☐ Add the prescription, type, description, and notification preference. Repeat if there are multiple prescriptions.

- ☐ Save Rx

You can also set one-off lifestyle Rx's from the calendar. These are for those truly one-off instances you may encounter, e.g., drink 3/4 of your bodyweight in ounces Saturday prior to your cross country flight.

BUILDING RELATIONSHIPS WITH CONSULTATIONS

Efficiencies begin with having context and being on the same page. Consulting with your clients on a monthly basis and having frequent check-ins helps with this context. The **consultation feature** allows you to implement and track these important connection points.

**STEP EIGHT:
SET A CONSULTATION CADENCE**

☐ **Initial**

The initial consultation is a great opportunity to ask great questions and start the coach-client relationship off on the right foot...a personalized one. These consult notes will always live in your client's consultation tab in case you ever need to reference them in the future.

☐ **Weekly**

You can assign your clients a weekly check-in from this section. When active, this check-in will be sent to your client's app on the day you select. You can personalize these check-ins from the Index to ensure you are getting the frequent feedback you need from each client.

☐ **Monthly**

You can create consultations from the monthly tab and record notes from the conversation. The app also lets you and your client know the last time you had a consultation. As a reminder, you can add your consultation link to your account, so clients can access this to book through the CoachRx client app.

> *FYI: Private consultation notes are not shared with your clients and are for your eyes only. Client-facing notes can be sent out in a custom client report.*

COACHRX
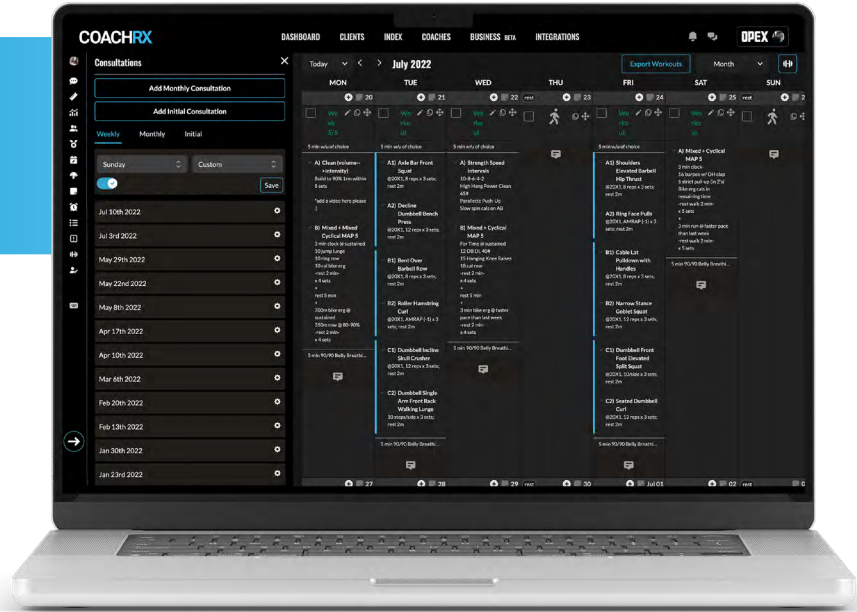
☐ **Custom Client Reports**

This feature allows you to export branded custom client reports to your clients, including the Intake Form, Consultation Notes, Assessment Data, Structural Balance Table, Long & Short Term Plans, Workouts, and Lifestyle. The ability to export branded client reports adds a level of professionalism to your service offering. This will help you to stand out from other coaches and increase your value proposition.

Two ways to implement this feature:
1. **Onboarding**: As part of your onboarding process, use it as an opportunity to connect your client to the process by giving insights into their consult notes, assessment results, what training will look like over the next year, and their first cycle.

2. **Monthly**: Send monthly consultation notes to keep your clients connected to the plan, highlight wins and losses from the previous month, and what you agreed to focus on for the upcoming month.

START YOUR FREE TRIAL AND SCHEDULE YOUR FIRST CONSULTATION IN COACHRX

MANAGING & GROWING YOUR BUSINESS

For maximum efficiency we've built CoachRx to allow you to manage your clients and your business through one platform. Rather than using multiple services, we recommend you take advantage of the Business Suite in CoachRx. Not only will this help you save money and time on multiple tools, it also makes for a more professional and polished experience for your clients.

**STEP NINE:
SET UP YOUR
BUSINESS SUITE**

Now you're up and running with your coaching systems, it's time to turn your attention to the business side.
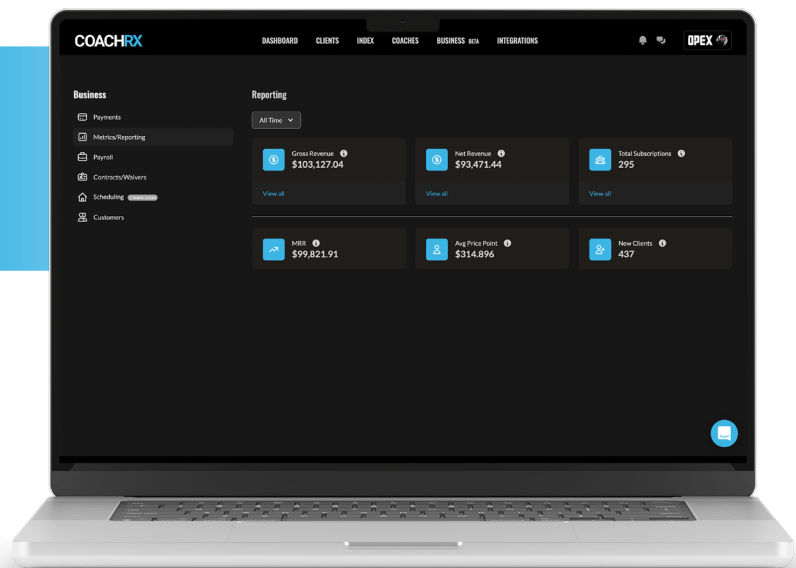
COACHRX

☐ **Payments**

Thanks to a seamless integration with Stripe you can process both one-off and subscription-based **payments** inside of CoachRx. Create your CoachRx Stripe account, add products and subscriptions, add clients to the pricing plans, and start collecting payments. It's as simple as that!

☐ **Storefront & Sales Pages**

You can build custom Sales Pages for all of your coaching services and a Storefront to display them inside the Business Suite. This feature removes the need to pay for and manage a clunky website and clients can purchase your services online.

Storefronts can be created for both organizations and as an individual coach and feature key information including product offerings, testimonials, videos & images, FAQs, bios, and contact information.

☐ **Metrics and Reporting**

If you've set up payments in CoachRx then you can start to access the following metrics and reporting:
- Gross Revenue
- Net Revenue
- Total Subscriptions
- Monthly Recurring Revenue
- Average Price Point per Subscription
- New Clients
- Open and Past Due Invoices

☐ **Payroll**

If you have coaches working underneath your organization and use Payments, then you can use the **payroll** feature to pay out your team, including different commission structures and one-off payments.

☐ **Contracts and Waivers**

Here you can create **contract and waiver templates** to send to your clients when you onboard them. They will receive an email to be able to complete the contract or waiver, and then a copy will be stored inside in-platform for easy record.

☐ **Customers**

Use this view to manage your customer list, update billing information, and see subscriptions and invoice items for each customer in your organization.

START YOUR FREE TRIAL AND BEGIN TAKING PAYMENTS IN COACHRX

TAKE ACTION AND EXPERIENCE COACHRX FOR FREE

We've packed a crash course in CoachRx into this guide and we're confident that you're now ready to make the most of your free 14-day trial. As coaches we know that the best way to get better at something is through practice and repetition, which is why it's time to implement everything you've just learned.

CoachRx is packed with features that will enhance the efficiency of your program design and refine the professionalism of your coaching business, so you can build a thriving coaching business. And we only just scratched the surface of what's inside in this guide! Whether you coach your clients online, in-person, or use a hybrid model, CoachRx is the all-in-one coaching tool you've always needed.

START YOUR 14 DAY FREE TRIAL IN COACHRX AND EXPERIENCE THE ULTIMATE FITNESS COACHING SOFTWARE FOR YOURSELF.

START YOUR FREE TRIAL

COACHRX FREE TRIAL CHECKLIST

We couldn't pack all of the incredible CoachRx features into this one cheat sheet, but if you follow these steps you'll hit the ground running when you **start your free 14-day trial.**

STEP ONE:
COMPLETE YOUR COACH PROFILE

Add your Consultation Link
Update Organization details
Customize your Notifications
Adjust Client Settings
Import Clients
Connect Integrations

STEP TWO:
BUILD OUT YOUR INDEX

Customize, add your own, or use what we've provided for:
Exercises
Lifestyle
Warmups & Cooldowns
FME Sets
Programs
Weekly Check-In Templates
Intake Forms
Documents

STEP THREE:
GET FAMILIAR WITH YOUR DASHBOARD

Explore the following sections:
Notifications and Messages
Metrics
Priorities
Activity Feed

COACHRX

STEP FOUR:
ADD & VIEW YOUR CLIENTS

Add your first client from the Clients page

Organize your clients with Tags

STEP FIVE:
ADD CLIENT DETAILS & DATA

Update each client's sidebar from the Calendar with:

Assessment details

FME data

Schedule for training sessions

Equipment lists

Priorities

Periodization/Planning

STEP SIX:
DESIGN AN EXERCISE PROGRAM

Use the Calendar view to design your first workout:

Add a Title

Add Coach Notes

Add a Warmup

Add Exercises & Mixed Modal pieces

Add a Cooldown

STEP SEVEN:
DESIGN A NUTRITION & LIFESTYLE PROGRAM

Add a Lifestyle plan from the Calendar

COACHRX

STEP EIGHT:
SET A CONSULTATION CADENCE

Conduct an Initial Consultation

Schedule Weekly Check-Ins

Schedule & conduct Monthly Consultations

STEP NINE:
SET UP YOUR BUSINESS SUITE

Set up the Payments integration

Build Sales Pages & Storefront

Utilize Metrics & Reporting

Use the Payroll feature

Send Contracts & Waivers

Manage your Customer List

CoachRx is your all-in-one coaching software to increase the fitness of your clients and the health of your business. **Start your free 14-day trial now** and experience all of these features and more.

START YOUR FREE TRIAL

COACHRX