

**FITNESS
ASSESSMENTS
FOR NEW CLIENTS**

OPEX

THE IMPORTANCE OF AN INITIAL ASSESSMENT

Fitness coaches commonly struggle to efficiently and effectively assess their clients. Many skip the assessment altogether, leaving them feeling like they're guessing how to create an ideal program for each individual. To help, we've developed a smart and straightforward assessment approach to ensure you understand your clients' essential data and can translate it into a quality fitness program design.

There are three main reasons to conduct an assessment:

- ➔ Firstly, it provides a starting point for working with a new client, showing you what areas to prioritize and what is within their current capabilities.
- ➔ Secondly, it gives you data points to track results. Clients expect results, and coaches and clients feel empowered as they monitor progress in their body composition (where appropriate), movement abilities, and work capacity.
- ➔ Thirdly, it starts the coach-client relationship with trust and professionalism. A polished initial assessment is a great way to demonstrate your coaching expertise and build rapport with your new client.

In this guide, you will learn the basics of **The OPEX Assessment** and how to transition from the assessment to designing an individualized exercise program. This approach has helped thousands of coaches worldwide and is taught in-depth in our coaching development course, The [OPEX Coaching Certificate Program \(CCP\)](#).

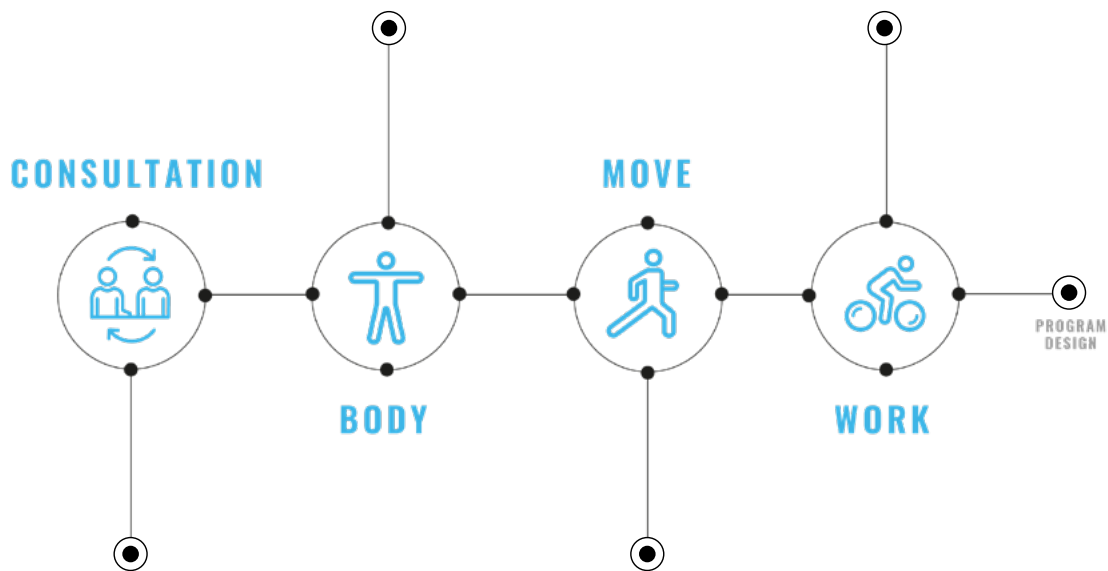
THE OPEX ASSESSMENT

The OPEX Assessment is a systematic approach to gathering assessment data.

This comprehensive client assessment begins with an initial client consultation—a quality conversation—and proceeds to body composition evaluation, movement limitations, and work capacity, so that you finish with a full client “picture” of data to help you design the perfect fitness program.

The **second step** of the assessment is a body composition assessment. During this part of the assessment the coach gathers information about the client's body composition which will be used as metrics to track progress.

The **fourth step** of the assessment measures the client's work capacity. The data collected here will give the coach a better understanding of how the client responds to energy system work, an idea of their essence, and will give them guidelines for what to include in their daily workout program.



The **first step** in the assessment process is the consultation, a 60-minute conversation with the client in a private setting, off of the gym floor. The coach's main goals during the consultation is to get to know the client, understand where they sit in ability, experience, behaviors, and nutrition, and identify their goals.

The **third step** of the assessment is a movement assessment. Here the coach will analyze the client's basic motor function and movement ability. This allows the coach to understand what physical limitations their client may have and how to safely program around or to improve those limitations.

Learn how to use the data from the assessment to design a personalized exercise program for your clients with this [6-month coaching course](#).

LEARN MORE

OPEX ASSESSMENT: THE CONSULTATION

The **consultation** is an opportunity for you to get to know your new client better and figure out their values and beliefs. This is done through a 60-minute conversation with the client in a private setting, off of the gym floor. Here are four critical things to focus on during the consultation.

- 1 Gather background information by asking questions. This includes a health history form and asking about a client's fitness background. Their answers will help determine the starting point for their exercise program.
- 2 Understand current behaviors, exercise, and nutrition. It is important to understand where a client is today in order to build a plan in each specific area.
- 3 Set goals. Work with your client to set clear and attainable goals, as these will be the metrics for tracking progress.
- 4 Plan to reconsult. A client's goals and lifestyle can change monthly or not at all for years at a time. It is important to meet on a monthly basis to reassess goals, reflect on progress, and adjust the program as needed.

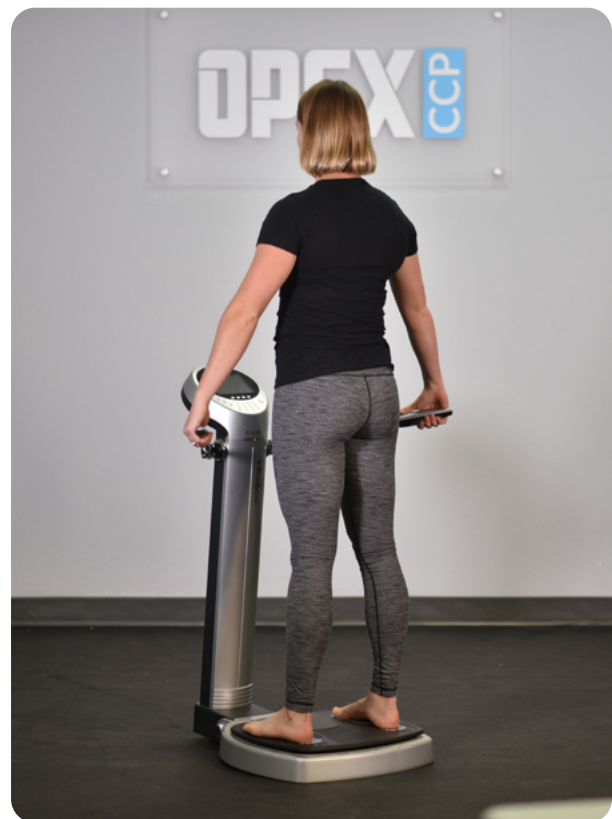
OPEX BODY

The **OPEX Body** assessment is an analysis of the client's height, weight, lean body, fat mass, basal metabolic rate, and other health biomarkers. This body composition knowledge allows you to create better training programs and easily monitor progress on goals like losing body fat or gaining lean body mass.

OPEX Coaches conduct Body assessments using an **InBody machine** to get the most accurate view of body composition balance. The InBody provides a detailed analysis of the client's body composition and measures the following data points.

RESULTS FROM THE INBODY INCLUDE:

- Weight
- Lean Body Mass (LBM)
- Body Fat Mass
- Basal Metabolic Rate
- Intracellular Water
- Extracellular Water
- Segmental Lean Mass Analysis



OPEX MOVE

In the **OPEX Move** assessment, you will take your client through a variety of movements. The goal of this assessment is to establish what the client can and cannot do in terms of movement. This information will directly inform what movements are within the client's abilities and can be included in their exercise program. Below are the eight movements included in the OPEX Move assessment.

MOVE ASSESSMENTS

Scratch Test



Squat



Toe Touch



Lunge



Active Straight Leg Raise



Side Plank



Reverse Plank



Front Plank



The information gained during an assessment is only useful when you know what to do with it. Learn the standards for the movement assessment and how the information gathered dictates exercise selection in the [OPEX Coaching Certificate Program \(CCP\)](#).

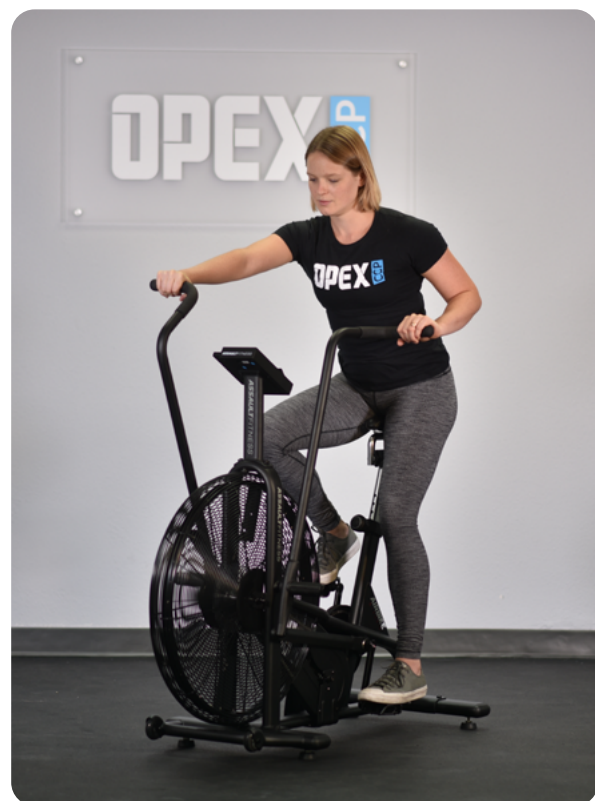
[LEARN MORE](#)

OPEX WORK

In the **OPEX Work** assessment you will test your client's work capacity. It is important to test work capacity as it provides insight into what the client is capable of and what to prioritize in their training program.

The work capacity test we use is the **10-minute AirBike for maximum calories**.

In this test a client goes at the fastest pace they can sustain for 10 minutes on the AirBike. The goal is to accumulate as many calories as possible during the 10 minutes. This assessment gives great insights into the client's ability to do work over a 10 minute time frame relative to their bodyweight, aerobic ability, ability to pace and sustain work, their response to energy system work, and whether they are more powerful or enduring in essence.



HOW TO TAKE THE DATA FROM THE ASSESSMENT AND TRANSITION INTO PROGRAM DESIGN

After collecting data from the initial consultation, and the OPEX Body, Move, and Work assessments, it's time to design the initial training program. In the Coaching Certificate Program (CCP) we dive into the nuts and bolts of program design and long-term planning, covering everything you need to write a personalized exercise program. Learn more [here](#).

→ **Prioritize**

First, you must define clear priorities for the training program, derived from the client's goals and what the assessment has uncovered.

→ **Plan**

Second, you will align the client's schedule and resources with a training plan, including days in the gym, rest days, and duration of sessions.

→ **Periodize**

Finally, you will use periodization to define a long-term training plan for the client, blocking out different training phases, including accumulation, intensification, deloading, pre-competition and competition.

A PRACTICAL APPLICATION OF THE OPEX ASSESSMENT MODEL

While a deep understanding of theory is important, fitness coaching requires a practical application. In this section, you will see the results from the assessment of a client avatar, and how those results will influence the program.

GEORGIA'S ASSESSMENT SUMMARY



INITIAL CONSULTATION:

- **Chronological Age:** 29 years old
- **Training Age:** 10 years of resistance training and aerobic activity, averages 3x in the gym and 5x BJJ
- **Goals:** Increase strength to support competitive BJJ while managing recovery
- **Sleep/Energy:** Georgia sleeps 7-8 hours per night with a typical bedtime of 9:00pm and a wake up time of 5am. It often takes her 1 hour to fall asleep after late night training and eating dinner at 8:30pm and on these days she wakes up with low energy.
- **Food Log Insights (3 day averages):**
 - **Calories:** 2330
 - **Protein:** 150g
 - **Carbohydrate:** 275g
 - **Fat:** 70g
 - **Water:** 80oz

OPEX BODY RESULTS

- **Height:** 5'7"
- **Weight:** 140.9lbs
- **Body fat:** 15.8%
- **Lean Body Mass:** 118.6lbs
- **Basal Metabolic Rate:** 1532kcal

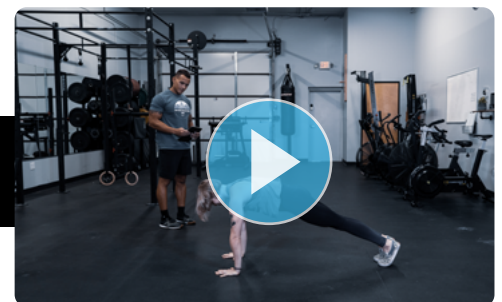
OPEX MOVE NOTICINGS

- **Squat:** Uncomfortable with pattern, neck and torso lean forward, very wide stance.
- **Scratch:** Lacking a small amount of external rotation on left and internal rotation on right
- **ASLR:** Feet turn out at the top
- **Side Plank:** Weak right side, strong left side
- **Front Plank:** Lack of core muscle endurance

OPEX WORK RESULTS

- 10-Minute max calories on AirBike: **125 calories**

[Click here](#) to watch Georgia's Squat Assessment and her coach Carl's analysis of the movement noticings and program design considerations.



TRANSITIONING FROM ASSESSMENT TO DESIGN

Considering all assessment results, there are initial priorities that will need to be addressed relative to exercise, nutrition, and lifestyle.

→ Exercise

Planning:

- Full Body Resistance 3 days/week on lower intensity BJJ days
- MAP 10 (easy aerobic work) as active recovery on rest days

Priorities:

- Improve core muscle endurance with regular exposure to front and side planks
- Volume and intensity with the **squat pattern** will be controlled, with exercise selection and tempo used to encourage tall posture and exploring a more narrow stance
- Bias single arm pushing due to imbalance on scratch and exposure unloaded bilateral pushing at full range of motion

→ Lifestyle and Nutrition

- Shift bedtime to 9:30pm and wake up time to 6am to allow 30 minutes of additional time to unwind before bed and more opportunity for sleep.
- Prioritize high nutrient-density, slower to chew and digest meats and non-starchy vegetables at breakfast and lunch.
- Incorporate a post-workout shake after training.
- Keep dinner small and prioritize softer, slow-cooked proteins and lower-fiber carbohydrates for easy digestion before bed.

CONCLUSION

The **OPEX Assessment** is the first step you'll take when you onboard a new client, but the real magic is in what happens next.

Expert fitness coaches use the data they collect to build a personalized exercise program, write weekly, monthly, and yearly training plans, and manage recovery outside of the gym with nutrition and lifestyle programs.

To offer this valuable service you need an education that prepares you with both the theory and science of program design, along with hands-on experience implementing coaching systems to a diverse array of clients.

Enter our flagship course, the **OPEX Coaching Certificate Program (CCP)**, the gold standard of education for individualized coaching and program design. CCP was developed and is taught by James FitzGerald, a 25-year coaching veteran, who has educated more than 10,000 coaches worldwide.

Our education not only bridges the gap between the classroom and the gym floor, but also gives you the opportunity to develop your own coaching flair under the mentorship of James himself.

Spots are going quickly and our next cohort won't be open until the next quarter, so act now and apply to speak to a coaching advisor today and see if **The OPEX Coaching Certificate Program (CCP)** is right for you.

APPLY NOW