SIX STEPS TO ENHANCE

PROGRAM DESIGN EFFICIENCY

OPEX

Introduction

To grow your coaching business, you have to simultaneously acquire new clients, while continuing to deliver an exceptional service to your existing ones.

Striking this balance is a challenge, but it's essential to achieve for your coaching career to thrive.

If you don't have efficiencies in place from day one, you will eventually find yourself working unmanageable hours and under-delivering to your clients. A subpar service means a low retention rate, forcing you to work even hard to acquire more new clients, and leaving you no time to do what you love the most—coaching.

However, by implementing the right program design systems you can scale your coaching business and continue to deliver your clients the personalized service and results they deserve.

The following pages outline the six steps you must have in place to design individualized programs more efficiently. You will learn the intricate balance of **efficiency** and **effectiveness,** so that you can grow your coaching business to its full potential.

Six Steps to **Program Design Efficiency**

1 Step 1: Use a Client Intake Form

The first step when you sign up a new client is ***to send and review an intake form***.

What is it?

The client intake is the first chance you will have to gather information about your client. It should be sent to the client before the assessment and consultation takes place.

This form will give you insight into how much experience the client has with exercise and their current behaviors. By sending the intake prior to your first consultation, you will be better prepared to guide the conversation and can identify behavioral red flags to ask further questions on.

From the Intake form you should gather:

- A brief fitness background and reason for hiring a coach.
- Basic information about their current exercise, nutrition, and lifestyle behaviors.
- Any prior health or medical conditions.

Download a **sample intake form** that you can use with your clients.

DOWNLOAD FORM

2 Step 2: The Initial Consultation

During the intake process you should also ***schedule an initial consultation*** with your new client. This will give you further background information on the client and help you set goals for the future.

What is it?

The consultation is an opportunity for you to get to know the client better and figure out their values and beliefs. The initial consultation should not be overlooked as this is a chance to make a good first impression and start your coach/client relationship off right. This is done through a 60-minute conversation with the client in a private setting, off of the gym floor.

There are three critical things you should focus on during the consultation:

Gathering background information. This includes reviewing the client intake form and asking questions on exercise history and priorities.

Understanding current behaviors, exercise, and nutrition. It is important to understand where a client is today to build a plan in each specific area. Have the client walk you through their normal day and ask questions about the *Basic Lifestyle Guidelines.*

Setting Goals. Work with the client to understand their reasons for hiring a coach and help them set clear and attainable goals. These will be metrics for tracking progress.

You should leave the initial consultation with four concrete things:

- Background information on their prior exercise, nutrition, and behavior experiences.
- The client's goals
- An understanding of what their average day looks like and their current behaviors.
- A set time to reconsult or clear expectations on when and how to schedule the next consultation.

Keeping detailed notes on the initial consultation is a must. Relying on memory alone is a recipe for forgetting important client information and breaking their trust. That's why coaches going through the **OPEX Coaching Certificate Program** (CCP) use *Coach RX*, a client management and program design platform.

Watch this video to see how an OPEX coach stores client consultation data in *Coach RX*.

3 Step 3: Conduct an Assessment

Before you begin to prescribe an exercise program it is essential to ***conduct a thorough assessment.*** This will give you information about the client and a starting point for their program. We use the three-part OPEX Assessment.

What is it?

The ***OPEX Body, Move, and Work assessment*** is a systematic approach to gathering information directly from the client.

This comprehensive client assessment evaluates **body composition, movement limitations,** and **work capacity.**

The ***OPEX Body assessment*** is an analysis of the client's height, weight, lean body, fat mass, basal metabolic rate, and other health biomarkers.

The ***OPEX Move assessment*** involves taking the 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.

The ***OPEX Work assessment*** is an initial test of the client's work capacity. It is important to test work capacity as it gives you insight into what the client is capable of and what you should prioritize in their training program.

CONSULTATION → BODY → MOVE → WORK

When you are finished you will have a full picture of client data to help you design a personalized fitness program.

You should take away from the assessment:

- Client capabilities
- Training plan priorities (see step 4)
- Guidance on exercise selection

Conducting an assessment is only beneficial if you track the data collected. Keeping records of your client's **OPEX Body, Move, and Work** scores will help you monitor their progress from day one.

Watch this video to see how we collate client assessment data in *Coach RX*.

The process of assessment does not end after the initial intake. You should continue to assess the client's progress over time using ***Fitness Monitoring Exercises*** (FME). These check-ins will look at data such as ***structural balance*** and ***Energy System Training***, giving you insight into the client's progress over time and shifting priorities.

Watch this video to see how we track FME data in *Coach RX*.

4 Step 4: Define Priorities

Now that you have a clear understanding of the client's starting point, it is time to ***define priorities***. The priorities will guide your program design.

What is it?

Defining priorities is the first step in transitioning from assessing to designing a program. This begins with analyzing the assessment and deciding what is most important to focus on first within the program.

For example, in the consultation, you may have identified that improving sleep quality and protein intake are nutrition and behavior priorities. From the **OPEX Move assessment**, improving anterior core strength and scapular stability may be a priority, while the **OPEX Body assessment** may have revealed that decreasing body fat is a priority. Finally, the **OPEX Work assessment** may have highlighted that developing the aerobic energy system is a priority.

All of these priorities must be recorded in a way that you can reference easily every time you sit down to program for your clients. Priorities will make sure you always select progressions that are appropriate for each client, relative to their goals and function.

Your defined priorities should include:

- Exercise priorities, including *resistance* and *Energy System Training*
- Behavior priorities
- Nutrition priorities

Watch this video to see how we track priorities based on **assessment** and **consultation** data in *Coach RX*.

5 Step 5: Create a Plan

Step five is ***creating a plan*** to help your client work on their priorities and reach their goals.

What is it?

Planning is the act of creating a road map for the client. In this phase, you and the client must decide exactly what it will take for them to reach their goals. Planning can include but is not limited to the days needed to train, the nutrition needed, what equipment they will need, and lifestyle components.

Planning is conducted considering the following:

- **The client's goals**
- **The assessment**
- **The client's training schedule**
- **The priorities within the design**
- **Your ability**

When you have finished planning you should have:

- The framework of a training program
- How many days a week they will train
- Where they will train
- The resources your client's have to train with
- How you will help the client reach their goals

Whether you have five clients or 50, failing to plan will lead to procrastination and wasted time. **Planning is an essential step to keep your program designs on track from week to week.**

Watch how we organize a client's starting point, priorities, resources, and goals into a clear road map using *Coach RX*.

6 Step 6: Periodize the Program

The sixth step to enhance your efficiency is ***periodization***. This is when you put pen to paper (or fingers to keyboard) and lay out a long-term training plan.

What is it?

Periodization is the act of building out training blocks that fit within the long-term training plan. When you periodize, you plan in ***blocks of time*** relative to the client's goals, abilities, and training schedule.

By thinking ahead and having a long-term plan in place, you'll remove the guesswork from your program design and will always have a clear understanding of the characteristics and focus of each training cycle.

Phases of training include:

- **Accumulation** - The main focus of this phase is building volume, skills, and technical ability.
- **Intensification** - Decreasing the volume of training and increasing intensity.
- **Pre-Competition** - Simulating the structure of competition.
- **Competition** - The act of competing.
- **Deload** - Time taken off post-competition specifically for recovery.

The person's **goals, function, training age, and assessment** dictate how much, if any, of the above phases are appropriate.

When you finish periodizing you should have:

- The focus for each phase of training
- How long each phase of training will last
- Benchmarks for determining if it was successful, including scheduled FMEs

Watch this video to see how we lay out long-term periodization in *Coach RX*.

Find the Balance Between Efficiency and Effectiveness

To seamlessly put all six steps of program design efficiency into practice takes experience and education.

The OPEX Coaching Certificate Program (CCP) provides just that.

Taught by industry leaders, CCP is the most comprehensive online coaching education and mentorship program. This course teaches you how to effectively and efficiently design long-term training programs for any client, so that you can grow your coaching business. You'll stop wasting your time, under-delivering, and churning clients, and start programming with confidence.

On top of learning a scalable system of coaching, all CCP Coaches get access to our brand new tool, *Coach RX*.

Download the CCP Curriculum Guide to learn more. DOWNLOAD

OPEX

OPEX

Client
Intake Form

ABOUT YOU

Name: *Age:*

Why do you want a fitness coach?

EXERCISE

How long have you consistently exercised?

- [ ] No consistent exercise
- [ ] 1-2 years
- [ ] 3-5 years
- [ ] 5+ years

If you currently exercise, how many days per week?

- [ ] 1-2
- [ ] 3-4
- [ ] 5+

BEHAVIOR

How many uninterrupted hours of sleep do you get per night?

- [ ] Under 5
- [ ] 5-6
- [ ] 7-8
- [ ] 8+

What time do you wake up? *What time do you go to sleep?*

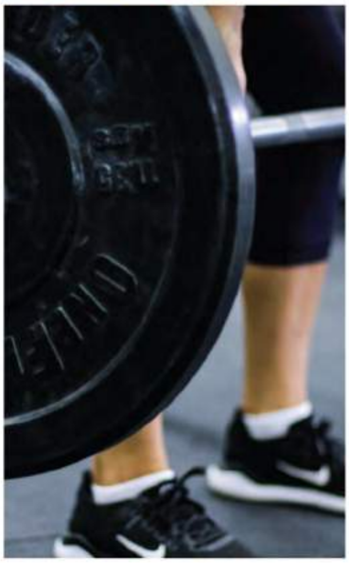
Are you currently or have you ever followed a nutrition program? If so, what worked, what did not and why?

How much water, in ounces, do you drink per day?

**Please log 3 days of food, fluids and supplements in MyFitnessPal and send those to your coach prior to your initial consultation.*

OPEX

BASIC LIFESTYLE GUIDELINES



- There are 24 hours in a day; apply work and rest appropriately
- You will one day die; get over it and get living
- Water; 1/2 of someone's body weight in ounces per day is the recommended intake
- Regulate circadian rhythms; go to bed and wake up at the same time every day
- The earth spins, and the sun and moon correlate with our energy patterns; we need sun exposure and to sleep with the moon
- Moving blood and proper digestion are essential daily routines
- Recovery; blood flow facilitates recovery and healing faster so be sure to move every day
- Digestion; food is a 36-60-hour investment, aided by sitting down while you eat and chewing your food well