
The Client Onboarding Kit

The 7-step system that stops new clients ghosting in week one.

A free playbook by BrixFit

Built for online and hybrid fitness coaches

brixfit.app



The first week decides more than the next three months

A new client has paid, but they have not yet built trust in your process. The first seven days must replace uncertainty with momentum.

01

Make them feel looked after

Respond in the hours after payment, when buyer doubt is highest. Confirm what happens next and when.

02

Collect what a safe plan needs

Gather goals, history, screening, schedule and food preferences before you programme.

03

Set the working agreement

Make check-ins, reply windows and client responsibilities explicit from day zero.

The retention principle

Speed creates confidence. Structure creates safety. A personal response creates connection.

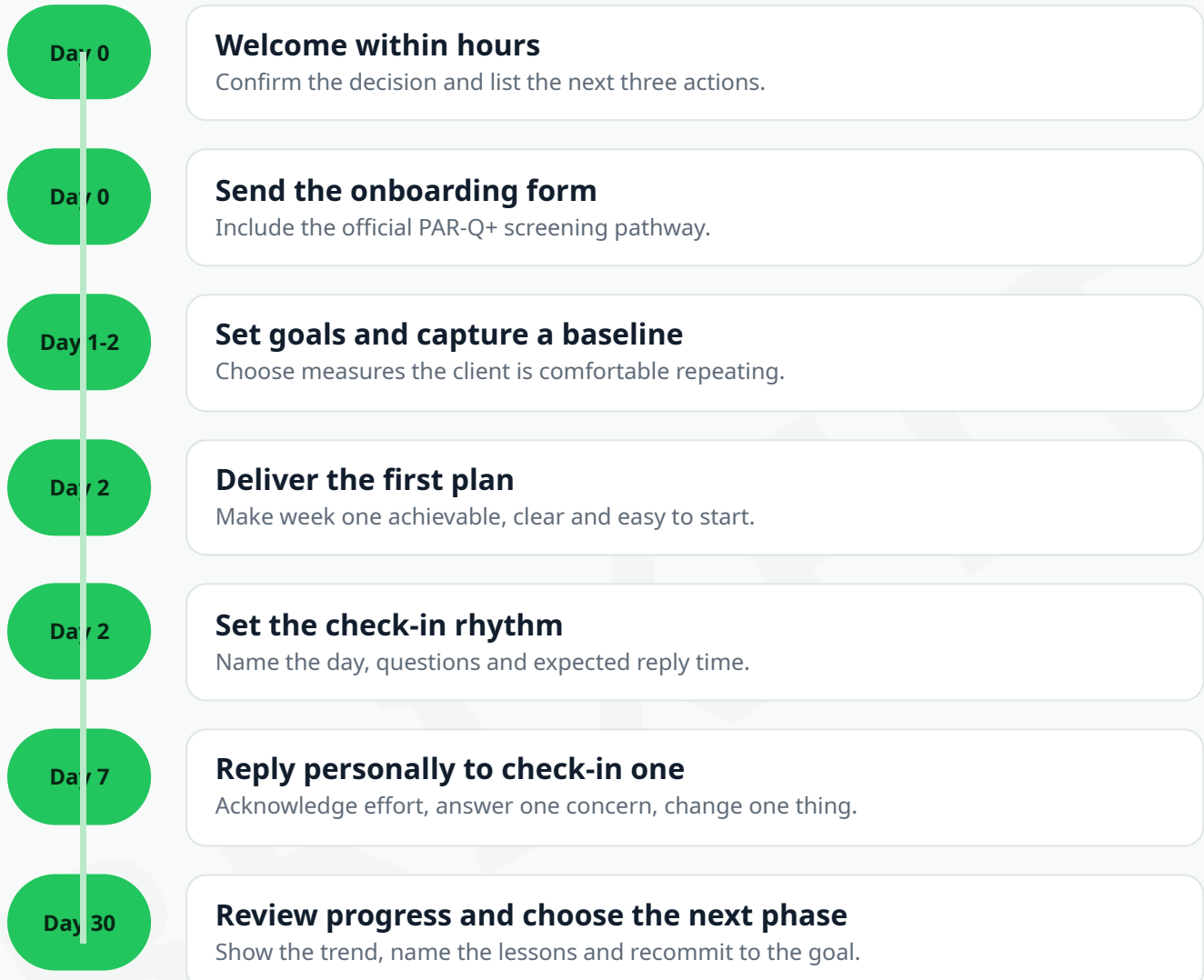
What the client should know by day 2

- ✓ What to do first
- ✓ Where their plan lives
- ✓ When you will check in
- ✓ How quickly you reply

What you should know by day 2

- ✓ Why the goal matters now
- ✓ What may limit safe training
- ✓ What fits their real schedule
- ✓ What previously broke adherence

Seven touchpoints turn a purchase into a coaching rhythm



Use the deadlines literally. “Soon” is not a client experience. “Within 48 hours” and “Monday afternoon” are.

Remove uncertainty with one clear welcome

Personalise the name and check-in day. Keep the sequence and boundary.

COPY AND PASTE

"Welcome aboard, [Name]! Really glad to be working with you. Here is what happens next: 1) Fill in your onboarding form today - it takes about 10 minutes. 2) I will send your first workout and nutrition plan within 48 hours of receiving it. 3) Your first check-in is next [Day]. I reply to messages between 9 am and 7 pm, Monday to Saturday. Any questions before then, just ask."

Send it within hours

Do not wait until the next day. A fast welcome confirms that the purchase activated a real process.

Use numbered next steps

A client should not need to search old messages or guess what comes first.

Name your reply window

Boundaries feel professional when they are explained before the first urgent message.

Ask for one action

The immediate task is simple: complete the form today. Momentum starts with completion.

Before you press send

☐ Name inserted ☐ Correct check-in day ☐ Form link tested ☐ Reply hours accurate

Ask what changes the plan

Group questions into short sections so the form feels purposeful, not like paperwork.

1 Basics

- ☐ Full name and preferred name
- ☐ Age
- ☐ Height and current weight
- ☐ Time zone
- ☐ Preferred contact method
- ☐ Occupation and typical work hours

2 Goals

- ☐ What is your main goal, in your own words?
- ☐ Why does it matter now?
- ☐ What would success look like in 12 weeks?
- ☐ Is there a deadline or important date?
- ☐ What have you tried before?
- ☐ How ready are you, from 1 to 10?

3 Training history

- ☐ What activity or training do you do now?
- ☐ What training experience do you have?
- ☐ Equipment: full gym / home / bodyweight
- ☐ Which days can you realistically train?
- ☐ What times usually work?
- ☐ What tends to interrupt your routine?

Coach filter

If an answer will not change your plan, communication or risk decision, consider removing the question.

Form experience

- ✓ Give a 10-minute estimate
- ✓ Use progress indicators
- ✓ Allow save-and-return if possible
- ✓ Explain why sensitive fields matter

Screen first, then personalise around real life

4 Health screening

- ☐ Complete the current official PAR-Q+ _____
- ☐ Current injuries or pain _____
- ☐ Past injuries or surgeries _____
- ☐ Medical conditions and medications _____
- ☐ Pregnancy or postpartum status _____
- ☐ Anything a doctor told you to avoid _____

Safety gate: Use the official, current PAR-Q+ rather than copying an old or modified form. If screening raises a concern, pause programming and obtain appropriate medical or qualified-professional clearance first. Stay within your scope as a coach.

5 Nutrition and lifestyle

- ☐ Diet: vegetarian / eggetarian / non-veg / vegan / Jain / other _____
- ☐ Foods loved, disliked or avoided _____
- ☐ Who usually cooks at home? _____
- ☐ How often are meals eaten outside? _____
- ☐ Sleep hours and quality _____
- ☐ Stress level, alcohol and smoking _____

6 Expectations

- ☐ What have you tried before, and why did it fail? _____
- ☐ How do you prefer to be coached: detailed explanation or direct instructions? _____
- ☐ What support would make follow-through easier? _____

Official screening resource: eparmedx.com. This playbook is an operational coaching aid, not medical advice.

Capture a baseline, then deliver an easy first win

Baseline capture checklist

- ✓ Weekly-average bodyweight, if the client is comfortable
- ✓ Waist, hips, chest and arm measurements
- ✓ Front, side and back photos
- ✓ Consistent lighting, distance and clothing
- ✓ One or two performance markers: push-ups, plank or a comfortable walk test

Consent matters: Explain that photos and measurements are private, used only for progress tracking, and optional.

The two-week simplicity rule

- ✓ Choose workouts they can finish on a busy week
- ✓ Build nutrition around foods they already eat
- ✓ Offer simple meal substitutions
- ✓ Focus on only one or two habits
- ✓ Explain how to ask for help

Deliver within 48 hours of receiving the completed form.

FIRST-PLAN DELIVERY MESSAGE

"Your plan is ready! Start with Monday's workout. For nutrition, focus on just two things this week: hit your protein target and keep your step count above 7,000. Everything else is a bonus. Message me if anything feels unclear."

Before delivery

☐ Workouts fit schedule ☐ Food fits household ☐ Instructions are clear ☐ First action is obvious

Teach the check-in rhythm before you need it

CHECK-IN SETUP MESSAGE

"Quick note on check-ins: every [Day] morning you will get a short check-in covering weight, workouts, nutrition, sleep, energy and your biggest win. It takes about three minutes. I review them [Day/time] and reply with any changes for the week."

Name one specific action they completed.



Respond to the concern behind their words.



Show that check-in data changes the plan.

Example first reply

"You got both workouts done during a difficult work week - that is the win. The evening hunger makes sense because lunch is light. Add one protein serving at lunch this week; keep everything else the same. Your knee note is important: skip the painful movement and message me before the next session."

SAME-DAY MISSED CHECK-IN NUDGE

"Hey [Name], I did not see your check-in come through today. No judgement - send me a quick update when you can, even if the week was messy. Your honest version is more useful than a perfect one."

Keep the nudge light. Early silence is a signal to reconnect, not a reason to lecture.

Make progress visible before choosing the next phase

The review is not a sales call disguised as coaching. It is a clear look at what changed, what worked and what the next block requires.

☐

Compare baseline with now

Review the weight trend, measurements, photos and one or two performance markers.

☐

Ask what felt easiest and hardest

Look for the habits and friction points that shaped adherence.

☐

Choose only one or two changes

Preserve what is working. Make the next phase easier to execute, not more complicated.

☐

Restate the original goal

Connect the next month to the outcome that mattered at sign-up.

☐

Ask for a testimonial when earned

Use a simple prompt: "What has changed for you, and what part of the process helped most?"

☐

Discuss continuing without pressure

If the current package is short, show the next milestone and explain what continued coaching would cover.

Close the meeting with a written next step

"For the next four weeks we are keeping your two training days, adding one 20-minute walk and moving protein to breakfast. I will update the plan today. Your next review is [date]."

Day-by-day execution planner

Print this page for every new client, or recreate it as tasks in your coaching system.

Day	Action	Done
Day 0	Send the personalised welcome message within hours of payment.	☐
Day 0	Send the onboarding form and official PAR-Q+ link; confirm reply hours.	☐
Day 1	Review answers; flag missing information or any health-screen concern.	☐
Day 1-2	Agree on two or three goals; capture measurements, photos and performance markers.	☐
Day 2	Deliver the first workout and nutrition plan with a short walkthrough.	☐
Day 2	Send the check-in rhythm message; schedule day-7 and day-30 reminders.	☐
Day 3	Confirm the first session or first plan action was completed without confusion.	☐
Day 7	Review check-in; reply the same day with one acknowledgement and one adjustment.	☐
Day 7	If missed, send the light nudge before the day ends.	☐
Day 14	Check whether the first plan still feels achievable; simplify if needed.	☐
Day 21	Collect the next progress markers and note the strongest adherence pattern.	☐
Day 30	Run the review, document the next phase and schedule the next milestone.	☐

Client: _____ Start date: _____ Coach: _____

Five onboarding mistakes that quietly create ghosting

- 1 Silence after payment**
The fix: send a named welcome within hours, with three numbered next steps.

- 2 An unstructured form**
The fix: group only decision-changing questions into six short sections.

- 3 Skipping health screening**
The fix: use the current official PAR-Q+ pathway and pause for appropriate clearance when concerns appear.

- 4 An over-ambitious first plan**
The fix: programme for a busy week. Early completion beats theoretical perfection.

- 5 No check-in rhythm**
The fix: name the day, questions and response time before the first week ends.

The standard to keep

Every new client should know what happens next, when it happens and how to ask for help.

Run this entire kit in BrixFit

Keep the experience personal while the operating steps stay organised in one place.

Forms and conversion

Send onboarding forms from the app and convert an existing lead into a client.

Custom check-ins

Create daily or weekly forms that match your coaching method.

Week-one tasks

Assign one-time or repeating tasks so the next action stays visible.

Review reminders

Schedule day-7 and day-30 follow-ups before the client leaves onboarding.

Welcome resources

Share a guide or resource with one client, everyone, or a programme group.

Progress in context

Keep photos, measurements and progress graphs on the client profile for review.

Coach more. Admin less.

Start free

brixfit.app

Explore features

brixfit.app/features

Book a walkthrough

See BrixFit in your setup

Playbook source: "Free Fitness Client Onboarding Template + Checklist," BrixFit. Health-screening reference: official PAR-Q+ resources at eparmedx.com. Product capabilities referenced from brixfit.app/features. Always adapt the process to your professional scope and local requirements.