

01 / MAKE THE FIRST IMPRESSION CLEAR

Trial-to-Membership Communication Checklist

A practical business-communication worksheet for gym owners, personal trainers, fitness studios and community organisers. Use it before commissioning more content or campaigns.

- ☐ **Explain the training experience.**
Describe the audience, format, level and support in plain language. Clarify what your business actually offers instead of relying on broad motivational slogans.
- ☐ **Keep identity consistent.**
Check the business name, location, class presentation, website and member-facing material. Decide what should remain consistent and what should vary by programme.
- ☐ **Verify practical information.**
Assign an owner for contact details, opening times, class format, fees, terms and real availability. Do not let an old promotion become the current offer by accident.
- ☐ **Use evidence with permission.**
Verify qualifications and the source of published claims. Obtain permission for actual member stories or photos. Illustrations are not real members or client results.
- ☐ **Choose an appropriate next step.**
Decide whether a visitor should read programme information, request a trial or discuss coaching fit. The requested action should match the information available.

For each checkpoint: Ready / Needs work / Not applicable.

This is a business-planning worksheet, not exercise, health or medical advice. It does not predict membership growth or personal fitness outcomes.

02 / DESIGN THE CORRECT HANDOFF

Connect interest to a real conversation.

A gym trial, a studio class and a personal-training programme are different experiences. Identify the appropriate route rather than forcing every business into the same membership form.

- ☐ **For gyms and studios.**
Explain the actual introduction or trial format, what the person needs to know and how to contact the business through its real scheduling process.
- ☐ **For personal trainers.**
Explain the coaching approach and engagement scope. Use a programme-fit conversation; the trainer remains responsible for suitability and programme delivery.
- ☐ **Test the full route.**
Check the page, mobile layout, form errors, wrong-location requests and unavailable sessions. Ensure a request does not display an unverified booking confirmation.
- ☐ **Name the response owner.**
Decide who receives the enquiry, what context is needed and how an unanswered or unsuitable request is handled. Document a realistic internal response process.
- ☐ **Keep stages separate.**
An enquiry, scheduled introduction, attended trial and confirmed membership are different events. Count only the stage supported by actual records.

For each checkpoint: Ready / Needs work / Not applicable.

The fitness business owns availability, scheduling, member acceptance and service delivery. The agency scope covers agreed branding, communication and handoff design.

03 / ONBOARDING, FEEDBACK & CONTINUITY

Build trust through responsible follow-through.

Trust comes from clear expectations and an experience that has an owner. Design useful communication without inventing member results or public endorsements.

- ☐ **Make onboarding practical.**
Explain the next administrative steps, contact person and agreed member information. Keep staff-approved service details current across the relevant channels.
- ☐ **Request genuine feedback.**
Use a neutral invitation. Do not invent reviewers, quotes, ratings or positive-only feedback. A real concern needs an operational owner, not just a polished reply.
- ☐ **Keep sensitive information private.**
Do not publish health details, personal measurements, private messages or identifiable records in marketing examples. Use an approved private route for sensitive concerns.
- ☐ **Follow up for the agreed purpose.**
Document permission where needed and provide a clear way to stop promotional messages. Keep rebooking, class updates and renewal communication relevant.
- ☐ **Review recurring issues.**
Record the theme, responsible person and next action. Distinguish a communication gap from a service issue that the fitness business must address.

For each checkpoint: Ready / Needs work / Not applicable.

Real testimonials and case studies need accurate attribution, permission and supporting evidence. Never use a fabricated transformation, member count or revenue result.

04 / PRIORITIES, OWNERSHIP & MEASUREMENT

Turn the review into a defined engagement.

Start with the smallest useful scope. A clear brand with plenty of enquiries may need better follow-up—not a rebrand or another advertising channel.

- ☐ **Choose one starting problem.**
Select identity clarity, programme presentation, trial enquiry handling, feedback response or member communication. Explain why it is the first priority.
- ☐ **Specify the actual deliverables.**
List locations, programmes, pages, formats, asset quantities, revision rounds, approvals and responsibility for the final business action.
- ☐ **Separate the budget lines.**
State professional fees, media spend, subscriptions, message usage, photography, printing and any specialist review. Do not imply unlimited work.
- ☐ **Review with real evidence.**
Define each measure, source, review period and responsible person. Separate delivered agency work from attended sessions, memberships, cancellations and renewals.

Priority	Owner	Review date
1.		
2.		
3.		

No package guarantees conversions, memberships, retention or revenue. Use actual records and disclose attribution gaps when reviewing business outcomes.