Virtual Personal Training Toolkit:

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| **Action** | **Instructions** | **Links/Resources** |
| Communicating with/”onboarding” with trainers | **Email your trainers.**  Once you have an onboarding meeting set up, be sure to cover these items (see table below for more information on each item):   * Virtual Training Best practices * Confirming a current draft/number of sessions with director * Modes of virtual delivery * Tracking sessions * Payroll | * Virtual training best practices * Email draft:   Trainers,  We are ready to begin allowing our clients to train virtually, if they chose. We have several best practices and guidelines we will all need to follow for virtual training. If you are interested in doing virtual sessions please let me know. You will need to be on our team call on (insert day/time you plan to onboard trainers). Only trainers who have gone through this onboarding will be allowed to train clients virtually.  Please note, clients do not have to train virtually. If they decide not to use this option right now, we will roll over and honor un-used sessions when the Y is able to open again. If they decide to train virtually, the sessions will count as a real session against their package.  In addition, please continue to forward any questions about holds or cancels to me. Please let me know if you have any questions.  Thank you,  (Your name) |
| Communicating with members | **Email all clients.** | * Email draft:   **We hope you have been enjoying our Facebook workouts from home!** We are excited to announce that we are now able to provide virtual training sessions, allowing you to keep training one on one while our buildings are closed. Virtual sessions will count as a used session, and we have several technology options to allow the session to happen. Your trainer will be in touch to confirm the best option before your first virtual session. The virtual training is just one more way we are working to keep you active during this time.  If you would like to move forward with this virtual training option, please let me know. If you have any questions or concerns about your training plans, please let me know. We look forward to resuming our regular training operations as soon as possible!  Thank you,  (Your name) |
| Confirming current draft | Double check that clients have a current draft in place (not on hold, not cancelled) before giving a trainer the ok to train virtually. | If you do not know how to do this, reach out to Cam |
| Modes of virtual delivery | * Facetime calls on your phone * Marco Polo: A "walkie talkie" app that allows you to send videos to friends. It records and stores video messages between you and anyone connected to you through it. You can also chat back and forth in real time while recording videos. This would be great for PT because both the trainer and client can provide immediate feedback, ask questions, etc. Marco Polo is also great for groups. This could work well for semi private training. * WhatsApp: Uses your phone's cellular or Wi-Fi connection to facilitate messaging and voice calling to nearly anyone on the planet. The app lets you make calls, and send and receive messages, documents, photos, and videos. A lot of people use WhatsApp strictly for video chatting with friends/family that may have different types of devices. I think this is a really good alternative for PTs. * Houseparty: A social networking service that enables video chatting through mobile and desktop apps. Users receive a notification when friends are online and available to video chat. The purpose of HouseParty is to allow group video chatting. “Hosts” can lock a group so that no one else can enter or request certain users to join a group. This may be ideal for semi private PT or SGT. | * <https://www.marcopolo.me/download/> * <https://www.whatsapp.com/download> * <https://houseparty.com/> |
| Tracking sessions | * Go over the tracking sheet with your trainers, use to cross reference current drafts and payroll. * Trainer should send an email to their client after the virtual session including:   + A written recap of the workout for the day.  This should be the expectation as we want to present them with a written program so that they can work on this throughout the week.   + Encouragement to the client.   + Confirmation of the appointment.   + An email response requested as the clients e-signature.   + Once a confirmation email come through, every e-signature email must be sent to director for tracking and payroll purposes. | * Tracking sheet * Email draft:   Hi \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_,  Here is a recap of what we did today during our virtual session:   * Straight-leg raises * Set 1 with base leg bent-knee (foot at opposite knee) x 10 ea   + Set 2with base leg bent knee (foot at opposite mid-calf) x 10 ea   + Set 3 with base leg straight. Make sure toes point up x 10 ea * Bridges with walk out x 2 sets   + Small steps out and back in   + Keep hips engaged and control “dip”   + Keep pelvis tucked at all times   Great job! Please respond to this email with your electronic signature to acknowledge that we “met” today from 2:30-3 PM, that you agree to this can be counted as one session of Personal Training by the YMCA and that you loved every moment of it!!  Thanks, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, and have a great day! |
| Payroll | * Ensure you have a process in place for getting time and processing payroll in time and correctly for sessions delivered. * Remember, if we are paying the trainer for a session, we are using a paid session for that member. |  |

As a reminder, here is the script to use if you get inquiries about cancels or holds:

* If after explaining this, the client requests to cancel or hold their draft:
  + Did you know that we offer the option to place your training on hold? *Wait for a response.*
  + You can hold your training plan and no payment will be taken during this time. When the designated hold period expires, we will automatically begin deducting the monthly training fees from your account and you can return to your training. *Wait for response. Our training policy states that a client may place their account on hold for up to three months. Please do not lead with the three month option, instead, lead with a hold option and let the conversation unfold.*
  + Member: Yes, the hold option will work for me. What do I need to do?
  + Staff: Great, let me take care of this for you. (Complete the spreadsheet with information needed, including when the hold should be extended to).
* If no:
  + Member: No, I think I would just like to cancel at this time but thank you for the information.
  + Staff: Happy to help. We will miss you and hope to see you back in the Y in the future. We will check in with you to see if anything has changed; let me verify your information.
    - Complete spreadsheet, and get information to your membership team.
    - If they ask for a refund (do not lead or offer this without being asked), it will be pro-rated from the cancel date, and their March missed sessions will not be rolled over.

**Please be customer service friendly, smile and accommodating to requests during this time.**