

## Client Lead Worksheet:

Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Address: \_\_\_\_\_

Sourced via: \_\_\_\_\_ Database \_\_\_\_\_ Approach \_\_\_\_\_ Referral \_\_\_\_\_

Age: \_\_\_\_\_ Sex: \_\_\_\_\_ Job: \_\_\_\_\_ Income: \_\_\_\_\_

Motives: \_\_\_\_\_ Attendance: \_\_\_\_\_

Ph/Personal contact: Day \_\_\_\_\_ Date: \_\_\_\_\_ Time: \_\_\_\_\_

Current Situation (why joined/exercising and why now [PAIN], when joined, what is their current weight/fitness/health, what has/is happening, who have they seen, what are their previous experiences [PREFERENCES]?)

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Ideal Situation (what would they like “it” to be/what is their ideal [GOAL], when do they want that to happen by [TIMEFRAME], how have they established this, what’s been holding them back [BARRIERS]?)

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What are their needs as you see them/how can you achieve the above outcomes [BENEFITS AND FEATURES]?

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Session offer = 1 comp exercise plan      3 for \$\_\_\_\_\_      other \_\_\_\_\_      no offer

Why? \_\_\_\_\_

Key Adherence Factors (what must you do to keep them coming and working properly):

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