

First impressions matter. As a personal trainer, your initial assessment session sets the tone for your client relationship. Our Free Assessment Template is designed to help you deliver a professional, results-driven experience that immediately builds trust and positions you as an expert. Whether you're onboarding a new client or reconnecting with an existing one, this tool will help you impress and retain them from the start.

What's Included in the Template

Client Information Sheet

A structured form to gather essential details like health history, fitness goals, and lifestyle habits—showing your client you care about their individual journey.

Goal-Setting Framework


A simple yet effective system to identify and prioritise your client's goals, from weight loss to strength building.


Fitness Assessment Checklist


A step-by-step guide to evaluate your client's current fitness level, covering flexibility, strength, endurance, and posture.

How to Use the Template

Save it to your device once opened. 

Print it out or use it digitally during your first session. 

Walk your client through each section with confidence, showing them you have a proven system in place. 

Use the data collected to craft a plan tailored specifically to their needs and goals. 

Why It Works

Clients feel valued and understood right from the start. 🤝

You will be organised, knowledgeable, and invested in their success. 🧠

It streamlines your onboarding process, saving you time and effort. ⌚

Take Your Personal Training Business to the Next Level

Struggling to grow your client base and keep them around? It's time to change the game. Our **Onboarding & Retaining Clients Course** is your all-in-one guide to mastering the skills they don't teach you in PT qualifications.

Here's what you'll get:

- ✅ A Proven Onboarding System: Impress clients from day one with a seamless process that builds trust and loyalty.
- ✅ Retention Strategies That Work: Learn how to keep clients committed for a minimum of 3 months (or more!) to secure consistent income.
- ✅ Social Media Marketing Hacks: Discover powerful tips to market your services online, attract your ideal clients, and stand out in a crowded industry.

🌟 **Currently on SALE—Don't Miss Out!** 🌟

Whether you're a new trainer or looking to grow your business in 2025, this course will give you the tools to thrive. Stop winging it and start building the business you deserve.

📧 **Download now and turn your passion into a profitable career!**

The
Inspo.
Academy
Learn. Lead. Inspire.

Client Assessment Form

Section 1: General Information

1. Full Name:

2. Age:

3. Gender:

4. Contact Information:

-Phone Number:

-Email:

5. Emergency Contact Information:

-Name:

-Phone Number:

Section 2: Health and Injury History

1. Do you have any current or past injuries?

2. Do you have any chronic conditions or concerns?

3. Are you currently taking any medications? (Please list):

4. Have you had any surgeries or medical treatments in the past? (Please list):

Section 3: Fitness Goals

1. What are your primary fitness goals? (e.g weight loss, muscle gain, improved endurance, etc):

2. What is your timeline for achieving these goals?

3. How committed are you to achieving these goals on a scale of 1 - 10?

4. What obstacles are in your way which could potentially stop you from reaching your goals?

Section 4: Current Fitness Level

1. How many days per week do you currently train?
2. What types of exercise do you currently participate in? (e.g cardio, strength training, yoga, etc):
3. What is your current fitness routine or schedule like?
4. How would you rate your overall fitness level on a scale of 1 - 10?
5. Are there any exercises you prefer, or any you dislike?

Section 5: Lifestyle and Preferences

1. What is your typical daily routine like? (e.g., work schedule, family, hobbies, etc.):
2. Do you prefer morning, afternoon, or evening workouts?
3. How much time can you dedicate to exercise each day?
4. What is your preferred workout style or type? (e.g HIIT, yoga, strength training, etc):
5. Do you follow any specific diet or nutrition plan?

Section 6: Additional Information

1. Is there any additional information you would like to share with your coach?