Name of Business

Intake Questionnaire

Please Discuss The Following With All New Clients At Your First meeting

- **Why did you respond to our advertisement?**
  - a) What were you curious about?
  - b) What do you think we do?
  - c) Why would you be interested in that?
  - d) Ideally, what would you like us to do for you?
  - e) Why is that important?
  - f) How would it change your life?
- **Let me start out by giving you our definition of fitness.**
  - a) Experiencing abundant physical health.
  - b) Absence of pain, discomfort, illness, and disease.
  - c) Experiencing vitality and high energy, sufficient to enable one to do what one wants.
  - d) Looking attractive and fit, proud of one's appearance.
  - e) Capable of living a long, healthy life.
  - f) Able to participate in sports and active recreational activities.
  - g) Having a healthy emotional and mental outlook fostered by the foundation of feeling good.

    Do you agree with this definition?

    Is there anything you would add or delete?
- **What is the current state of your fitness?**
  - a) On a scale of 0-10 with 0 being barely alive and 10 being totally fit, how do you rate your fitness?
  - b) What illnesses or medical conditions do you have?
  - c) How is your energy level?
  - d) How would you rate the quality of your nutritional intake?
  - e) Do you feel refreshed and energized after sleep?
  - f) Is your sex life fulfilling? *(Don't ask this of clients of the opposite sex as it may be misconstrued.)*
  - g) What areas of your personal fitness would you like to improve?
  - h) What specific thing would you like to change? What else?

    What else?
  - i) If you could improve or change all these things, what would it mean to you?
  - j) How would it impact your feelings of self worth?
  - k) Do you think you deserve to be fulfilled in this area of your life?
- **What is your current fitness program?**
  - a) Exercises:
  - b) Nutrition and supplementation:
  - c) What do you know about how to improve your conditioning?
- **How well is your current fitness program working for you?**
  - a) Why isn't it working?
  - b) Are you willing to make some changes?
  - c) Do you care enough about your own well-being to make it a priority?
- **Aside from financial cost, is there anything that would stop you from embarking on a fitness program?**

  (Overcome all non-cost objections before proceeding.)
- **If you had everything you wanted in life except for good health, would that be satisfactory?**
  - a) How much do you pay for medical insurance?
  - b) How much do you pay for doctor bills?
  - c) Given the expensive cost of health care after one gets sick, doesn't it make sense to you to spend a little money to prevent health problems?
  - d) How much is your health worth?
- **If there were an affordable program that could give you everything you want in the way of health and fitness, would you do it?**

  When?_____ *(If they are not willing to act now, you should terminate interview at this point and ask them to come back when they are ready to make a change.)*

continued on back

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Okay (Name), let me tell you a little about my experience and my personal philosophy of fitness. In working with clients, I like to focus on... (expand). I have lots of experience in... (expand on your areas of expertise). Most of my clients are able to achieve their goals because... (expand on your motivational skills).

Another reason for my high success rate is that I confine my practice to only those individuals who are really serious about improving their fitness. Are you? (Answer.)

Okay (Name), the next step is to set up an introductory session so that we can get a feel for how effectively we can work together. The session will last for forty-five minutes and the cost is just $.

At the end of the introductory session, we'll make a decision as to whether you should become my regular client or not. If the decision is "no" we'll just part as friends. If it's "yes," I'll ask you to commit to a series of sessions and we'll carefully define your goals and make sure that you reach them. Does that sound fair to you? (Yes.)

Good. What time of the day works best for you for the sample session… morning, afternoon, or evening? (Answer) Okay, I have two time slots open this week. (Tuesday at one o'clock or Wednesday at two o'clock) Which is better for you? (Choice.) Great, then I'll see you at (time). (While shaking hands enthusiastically...) It's been a pleasure meeting you.

Notes:

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