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Consultancy Project Executive Summary

Organization: Gardner-Webb University School of Education

Project Title: CREATING A PERSONAL TRAINING STUDIO

Candidate: Silje Storstrand

Consultancy Coach: Dr. Jeff Hamilton

Defense Date: July 27, 2020

Authorized by: Joseph Adkins, Owner Silly Fitness, LLC

Approval

This consultancy project was submitted by Silje Storstrand under the direction of the persons listed below. It was submitted to Gardner-Webb University School of Education and approved in partial fulfillment of the requirements for the degree of Doctor of Education at Gardner-Webb University.

Dr. Jeff Hamilton, Faculty Advisor
Gardner-Webb University

Date

Joseph Adkins, Site Advisor
Owner Silly Fitness, LLC

Date

Abstract

CREATING A PERSONAL TRAINING STUDIO. Storstrand, Silje, 2020: Consultancy Project, Gardner-Webb University.

The purpose of this project was to create a personal training studio that would provide a safe, clean, and welcoming environment for clients as well as help the owner create strategies for obtaining and retaining clients. I partnered with a local personal trainer, Joseph Adkins, who was aspiring to open his own personal training studio. Joseph has a degree in personal training and years of experience in the industry as a personal trainer and assistant manager at a large franchise gym and, most recently, as an independent personal trainer at a local gym. Joseph was not satisfied with the environment, the number of clients, and his client retention rates and thus wanted to open his own personal training studio. Joseph does not have any education in, nor does he have much experience with, the business side of the industry. Therefore, he requested my help in the process of opening the studio and creating strategies for obtaining and retaining clients. This project included the planning process, the process of creating the business and opening the studio, and the process of adjusting for success in the first year of being in business. The main area of focus for this project has been an extensive planning process including, but not limited to, research of the local area real estate market, research of the exercise equipment market, budgeting for startup costs, following through with purchasing equipment, signing a lease and other contracts, and renovating.

Keywords: starting a small business, personal training studio, growing a personal training business, personal training client retention

Table of Contents

1	Introduction.....	1
1.1	Project Purpose	1
1.2	Associated Documents.....	2
1.3	Project Plan Maintenance	2
2	Project Scope	3
2.1	Outline of Partnering Organization’s Objectives.....	3
2.1.1	Objectives	3
2.1.2	Success Criteria.....	3
2.1.3	Risks.....	3
2.2	Outline of Student’s Objectives	3
2.2.1	Objectives	3
2.2.2	Success Criteria.....	4
2.2.3	Risks.....	4
2.3	Definitive Scope Statement.....	4
3	Deliverables	5
3.1	To Partnering Organization.....	5
3.2	From Student.....	7
4	Project Approach	8
4.1	Project Lifecycle Processes.....	8
4.2	Project Management Processes.....	10
4.3	Project Support Processes	10
4.4	Organization.....	10
4.4.1	Project Team	10
4.4.2	Mapping Between SFPTS and Student.....	10
5	Communications Plan.....	12
6	Work Plan	13
6.1	Work Breakdown Structure	13
6.2	Resources	13
7	Milestones	16
8	Metrics and Results.....	17
9	Risks, Constraints, Assumptions.....	22
9.1	Risks.....	22
9.2	Constraints	24
9.3	Assumptions.....	25
10	Financial Plan.....	26
11	Quality Assurance Plan.....	28
	Appendix.....	30
	References.....	45

1 Introduction

1.1 Project Purpose

The purpose of this project was to create a space for personal training that is nice and clean and feels like a welcoming space for clients as well as to help the owner create strategies for obtaining and retaining clients and to help create processes operating the studio efficiently. The owner of the business, Joseph Adkins, has years of experience in the personal training industry, both as a personal trainer and as an assistant manager at a large franchise gym, and most recently as an independent personal trainer at a local gym. The local gym offered a chaotic atmosphere. Cleanliness and order were clearly not prioritized as it was not uncommon to find a used Band-Aid on the floor, sweaty exercise equipment, broken exercise equipment, and misplaced personal items and exercise equipment. Many clients expressed that they felt intimidated by other gym-goers, and they did not like how unsanitary the gym was. Joseph was not satisfied with the environment, the number of clients, and his client retention rates, and thus wanted to open his own personal training studio that would offer a clean and welcoming environment. However, Joseph does not have any education in, nor does he have much experience with, the business side of the industry. Therefore, he requested my help in the process of opening the studio, creating strategies for obtaining and retaining clients, and to help create processes operating the studio efficiently.

As a result of this project, Silly Fitness, LLC and Silly Fitness Personal Training Studio (SFPTS) were created. SFPTS is a privately owned personal training studio offering one-on-one personal training sessions, small group training, and larger group training called Bootcamps. At SFPTS, we strive to provide high quality training in an environment that feels safe and welcoming to everyone, regardless of background and abilities.

Technical Terms and Definitions

Clients. Any individual signed up for personal training sessions with one of the personal trainers at SFPTS.

Facility fee. All clients must pay a monthly facility fee to SFPTS for use of the studio and equipment. The money generated from the facility fees is used to cover SFPTS monthly fixed costs (rent and utilities).

Day pass. Clients have the option to pay a for a day pass each time they visit the studio if they do not wish to pay the monthly facility fee. The money generated from the day passes are also used to cover SFPTS monthly fixed costs.

Bootcamp. Larger group training session offered at a lower rate than individual training sessions.

1.2 Associated Documents

Appendix A: Joseph's (owner) client retention breakdown first year in business

Appendix B: Professional Literature Review

1.3 Project Plan Maintenance

The scope of the project included three phases: the planning process of opening a personal training studio (Phase 1), the process of creating the business and opening the studio (Phase 2), and the process of adjusting to ensure success once in business (Phase 3).

Phase 1 and phase 2 of the project followed strict timelines. The timeline for Phase 1 was 6 months; and for Phase 2, the timeline was 3 months. Phase 3 allowed for adjustments at any point throughout the first 12 months of being in business. There was no formal process for updating the project plan. All changes were approved by the owner and me.

2 Project Scope

The scope of this project includes the planning process of opening a personal training studio (Phase 1), the process of following through with the plans for opening (Phase 2), and adjusting to ensure success once opened (Phase 3). The timeframe for the project is approximately 6 months for the planning phase, 3 months for the follow-through phase, and 12 months for adjustments.

2.1 Outline of Partnering Organization's Objectives

2.1.1 Objectives

- Creating a personal training studio that serves as a safe and welcoming space for experienced exercisers as well as individuals who are new to exercise
- Provide a clean and organized environment for clients to reach their goals
- Attract new clients
- Increase client retention rate
- Efficient operation of the studio

2.1.2 Success Criteria

- Successful opening of personal training studio that offers a clean, safe, and welcoming atmosphere to clients
- Acquisition of new clients
- High client retention rates
- Maintaining a clean and organized space
- Generating enough income from facility fees and day passes to cover monthly fixed costs

2.1.3 Risks

A detailed risk assessment is covered in Section 9. The highest identified risk to the partnering organization was the possibility of not being able to bring in enough money to cover fixed costs. A mitigation plan was created to strive to prevent this from occurring.

2.2 Outline of Student's Objectives

2.2.1 Objectives

- Aid in creating a personal training studio that serves as a safe and welcoming space for experienced exercisers as well as individuals who are new to exercise
- Create strategies to provide a clean and organized environment for clients to reach their goals
- Create strategies to attract new clients
- Create strategies to increase client retention rate
- Create strategies for operating the studio efficiently

2.2.2 Success Criteria

- Successful opening of personal training studio that offers a clean, safe, and welcoming atmosphere to clients
- Strategies to provide a clean and organized environment for clients to reach their goals are successful
- Strategies to attract new clients are successful
- Strategies for increasing client retention rates are successful
- Strategies for maintaining a clean and organized space are successful
- Strategies for operating the studio efficiently are successful

2.2.3 Risks

A detailed risk assessment is covered in Section 9. The highest identified risk of my project was the possibility of no increased interest in training with us at the new studio.

2.3 Definitive Scope Statement

The scope of this project included conducting research of the local real estate market as well as the local and online exercise equipment market; acquiring all necessary licenses to operate a business in the city of Danville, VA; opening a personal training studio; creating strategies for obtaining and retaining clients; and finally, creating processes for operating the studio efficiently.

3 Deliverables

3.1 To Partnering Organization

The due dates for the deliverables to the partnering organization are estimated. All deliverables fall within one or two of the three project phases. Table 1 depicts the deliverables, the methods for obtaining the deliverables, and the estimated dates associated with each deliverable.

Table 1*Deliverables to the Partnering Organization*

DELIVERABLES	OBJECTIVES	TIMEFRAME
CREATE A PERSONAL TRAINING STUDIO THAT SERVES AS A SAFE AND WELCOMING SPACE FOR CLIENTS (PHASE 1)	Create a budget and research the current real estate market for potential spaces to rent	Start researching summer 2018. Sign contract by December 2018. Open early 2019.
	Survey current clients about whether they will follow to the new location, and what they would like to see in the new space (equipment, environment, etc.)	Starting October 2018 through December 2018.
	Create budget for renovations and equipment and check as many boxes as possible according to what current clients have indicated is important to them	Create budget by December 2018. Purchase equipment by January 2019
PROVIDE A CLEAN AND ORGANIZED ENVIRONMENT FOR CLIENTS TO REACH THEIR GOALS (PHASE 2) ATTRACT NEW CLIENTS (PHASES 2 & 3)	Research the best and most affordable equipment for our purpose	Start research summer 2018
	Only purchase equipment that we know will be utilized frequently	Purchase equipment needed for opening by January 2019.
	Designate space for all equipment to be stored when not in use	Designate space prior to opening. Adjust whenever necessary
	Create weekly cleaning schedule. Keep schedule visible for accountability	Create schedule before opening in early 2019
	Be present on personal social media accounts (post daily to promote the studio and ourselves as personal trainers)	Starting immediately, continue indefinitely
	Create social media accounts for the personal training studio and post daily	Create account early 2019, prior to opening day
MAINTAIN A HIGH CLIENT RETENTION RATE (PHASES 2 & 3)	Create new business cards and flyers and distribute throughout town	Create new business cards prior to opening, continuously distribute
	Encourage current clients to spread the word through word of mouth as well as posting on social media	Shoot for weekly Facebook location check-ins and monthly Facebook recommendations
	Create personal connections with clients by showing interest in them and their life outside of the gym	Ask about clients' days/weekends/families/pets every time they visit
	Make clients feel like we are worth every penny and then some by helping them reach their goals	At least monthly check-ins to determine weight loss/gain and other progress
	Get to know our clients and what their likes and dislikes are so we can make their sessions more fun and keep them wanting to come back	Ask for feedback during/after every visit
	Create a community that our clients want to keep being a part of	Starting immediately upon opening
BE EFFICIENT OPERATORS OF THE STUDIO (PHASES 2 & 3)	Create procedures and processes for running the studio	Create procedures and processes prior to opening, continue to improve and update whenever necessary
	Be organized and stay on top of bills	Budget for the following month at the beginning of each month
	Create monthly budgets to help us reach our goals	Create budget by the last week of each month for the following month

Create clear and concise goals and expectations for how many personal training clients are needed and how many bootcamp passes we need to sell based on current prices

Take “inventory” by the 15th of each month and create strategy for how to move forward by the end of the week if needed

3.2 From Student

All expected deliverables to the partnering organization listed above are from the student. There were no additional deliverables.

4 Project Approach

4.1 Project Lifecycle Processes

The project was split into three phases. A detailed overview of the three phases follow below.

Phase 1 – Planning. The planning phase included real estate research to find the most ideal space for the studio, client surveys to determine wants and needs of current clients, and equipment research to find the best quality equipment at the most affordable prices. This phase started in June 2018 and concluded 6 months later in December 2018.

Real Estate Research. The first steps in this process were to determine how much space we would need for the studio, the location of the studio (i.e., busy area, desolate area, or somewhere in between), and an ideal budget for rent and utility costs. The acceptance criteria included (a) must have some sort of outdoor space available for running, a pull-up rack, and simple body weight exercises; (b) must have designated office space; (c) must have a decent restroom and changing area; (d) must have room for storage of cleaning supplies, toilet paper, etc.; (e) gym floor must be at least 1,000 sq. ft., must have a stretch of approximately 40 ft. to put down artificial turf, must be able to bolt equipment to floor, ideally has concrete walls for hanging pull-up racks on the walls; (f) rent is below \$1,000/month; and (g) utilities are estimated to be below \$200/month.

Client Survey. This process was less formal. We used oral surveys to gather opinions and impressions from our current clients. The goal was to gather information about what they would like to see in a new studio. We wanted to know what they valued. We wanted to find out if it was important for them that the studio would be organized and clean, whether they preferred exercise machines over free weights and other functional equipment, and what they liked/disliked about the current location. We also asked if they planned on following us to the new location; what, if anything, it would take to convince them to follow us; and how far from the current location they would be willing to travel.

Equipment Research. The first steps in this process were to determine the budget for equipment, determine what pieces of equipment we needed (separate “wants” from “needs”), and determine what equipment we already had that could be used. We referred to the client surveys to see what clients valued in terms of equipment. We also referred to our real estate research to determine how much space we had available as well as what equipment we could fit in the space without creating an unorganized and chaotic environment. The acceptance criteria included (a) equipment we already have must be in great condition; (b) total cost for all new equipment must

not exceed \$5,000; (c) new equipment should be logistically feasible and serve more than one purpose (i.e., a power rack that can be bolted to the floor can serve the purpose of squat rack, bench press station, bumper plate storage, landmine station, TRX station, combat rope anchor, pull-up bars, etc.); and a stretch of artificial turf can be utilized for running, plyometrics, sliding core exercises, stations for group exercises, storage area for exercise balls and sandbags, etc.); and (d) new and used equipment must be used frequently, must be of high quality, and must match the appearance of the studio and other equipment.

Phase 2 – Create Business and Open Studio. This phase included signing a lease and all other contracts and paperwork needed to create a business, creating processes for operating the studio efficiently, purchasing equipment, undertaking any necessary renovations, and installing exercise equipment. This phase started in January 2019 and concluded in March 2019.

Signing Lease and Other Contracts. Once all the real estate research had been completed, we chose the location that met most of the acceptance criterion determined in Phase 1. In addition to signing a lease, we set up an account with the city utility office and went through all the processes of creating a new business such as creating an LLC and acquiring a business license, zoning permit, and a fictitious name.

Purchasing Equipment. Once all the equipment research was completed, we purchased the equipment that met most of the acceptance criterion determined in Phase 1.

Creating Processes. This phase also included creating processes for operating the studio efficiently. Such processes included assembly of all equipment as well as determining the logistics and placement of all equipment, creating a cleaning schedule, and creating a social media posting schedule.

Phase 3 – Adjusting. This phase included constant evaluation of current processes and procedures. Ensuring success required that we constantly evaluated ourselves and the studio and adjusted accordingly. This phase started as soon as the studio was up and running in March 2019 and was a continuous process the first year of being in business through February 2020. Throughout this phase, we evaluated anything from marketing (social media) efforts; client acquisition and retention rates (Do we need to improve? How can we get better?); cleaning schedule effectiveness; equipment (usage, quality, placement, etc.); membership rates and rates per session; and group training schedule.

4.2 Project Management Processes

The processes for project management included completing consultancy project milestones as well as reviews with the consultancy coach each semester. Additionally, the site advisor and I established a timeline for each phase of the project (see Table 1, section 3.1, and section 4.1). No dates were set in stone. Enough time was allowed for each phase and each element of the phases to allow for delays. For example, equipment was to be purchased by January 2019 to allow for potential delivery delays, equipment installment difficulties or product malfunctions, and potential delay in move-in date.

4.3 Project Support Processes

This project was supported by the project site advisor and me. The consultancy coach offered support through Milestone feedback each semester. Additionally, current clients (prior to opening SFPTS) were instrumental in the process of opening the personal training studio as well as ensuring continued success throughout the duration of this project. Clients who were training with us prior to opening the personal training studio offered to help with anything from installing equipment, painting walls, installing artificial turf, scrubbing floors, creating and hanging vinyl decals, and donating exercise equipment as well as other operational equipment such as a TV, refrigerator, speakers, and a desk and chair for the office.

4.4 Organization

4.4.1 Project Team

The project team members included the site advisor (owner) and me (the consultant). The site advisor and I communicated on a weekly and sometimes even daily basis to keep each other in the loop about research, meetings with real estate agents and landlords, ideas, and progress. The communication was unstructured and informal. Additionally, the consultancy coach provided feedback each semester.

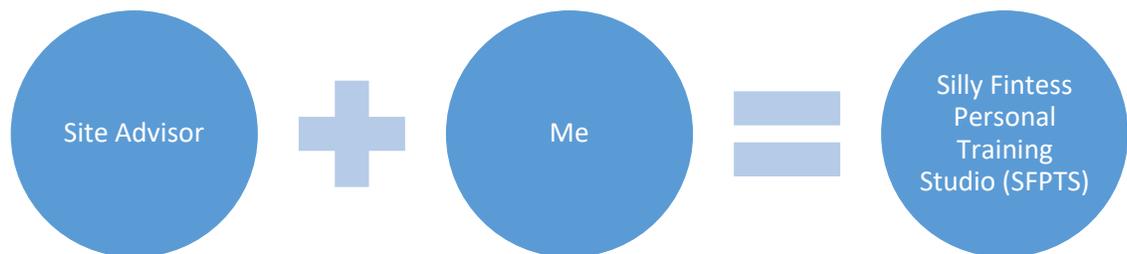
NAME	PROJECT ROLE
Silje Storstrand	Consultant
Joseph Adkins	Site Advisor (Owner)
Dr. Charles Bingham	Consultancy Coach (August 2018-December 2018)
Dr. Jeffrey Hamilton	Consultancy Coach (January 2019-July 2020)

4.4.2 Mapping Between SFPTS and Student

Formally, a hierarchy existed between the site advisor (owner) and me; however, in reality, we worked as a team where both parties' opinions were equally valued and considered. As illustrated by Figure 1, the input from and cooperation between the site advisor and me resulted in the successful creation of SFPTS.

Figure 1

Mapping Between SFPTS and Student



5 Communications Plan

Table 2

Communications Plan

WHO	WHAT	WHY	WHEN	HOW
SITE ADVISOR & I	Fixed costs budget	Help narrow real estate market search	Summer 2018	Determined by site advisor and me
	Start-up budget	Determine type of equipment	By December 2018	Determined by site advisor and me
	Client survey (current clients prior to opening SFPTS)	Determine how many will follow, wants/needs	October 2018 – December 2018	Informal oral survey during training sessions
	Real estate listings	Find the perfect listing for studio	Summer 2018 – December 2018	Web search, site visits, meet with agents for showings
	Exercise equipment market overview	Ensure the best deals	Summer 2018 – December 2018	Web search
	List of leases and contracts needed	Ensure preparedness	December 2018 – February 2019	Web search, dialogue with landlord
	Strategies to obtain clients	Need more clients	March 2019 – February 2020	I will create strategies
	Retention strategies	Client retention needs to be improved	March 2019 – February 2020	I will create strategies
	Monthly budget/expenses	Help stay on top of bills	Ongoing monthly March 2019 – February 2020	Stay organized, write everything down
	Monthly goals	Help ensure revenue covers fixed costs	Ongoing, monthly March 2019 – February 2020	Site advisor and I will set goals on a monthly basis based on current prices

6 Work Plan

The main goal of this project was to open a personal training studio that would serve as a safe and welcoming space for clients. Additionally, four more goals were set to ensure success of the business. A list of project goals follows below.

1. Open a personal training studio that serves as a safe and welcoming space for experienced exercisers as well as those who are new to exercise
2. Provide a clean and organized environment for clients to reach their goals
3. Attract new clients
4. Maintain a high client retention rate
5. Be efficient operators of the studio

6.1 Work Breakdown Structure

All the work for this project was initiated by me and monitored by me and the site advisor. See Table 3 for an illustration of the identified tasks, how they were undertaken, the resources needed, and the timeframe for each task.

6.2 Resources

Table 3 illustrates the identified tasks, how they were undertaken, the resources needed, and the timeframe for each task.

Table 3

Identified Tasks

TASKS	SUB TASKS	TASK NUMBER	RESOURCES NEEDED	TIMEFRAME
OPEN STUDIO	Research real estate	1	The internet and meetings with real estate agents/landlords	Summer 2018 – 3 months
	Research equipment	2	The internet	Summer 2018 – 6 months
	Client survey	3	A notepad	October 2018 – 3 months
	Purchase equipment	4	The internet	By January 2019
	Sign lease	5	Lease agreement with landlord	By December 2018
	Obtain licenses	6	Licenses and documents from various city offices	By February 2019
	Renovations	7	Tools and hardware, paint, cleaning supply, and clients/friends for manpower	February 2019 – 1 month

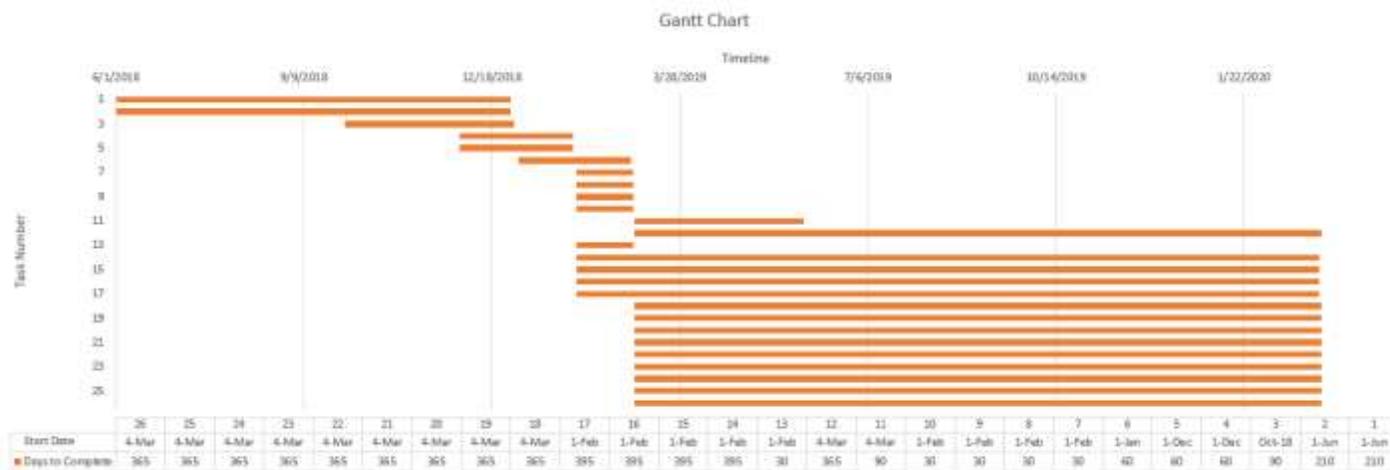
	Equipment assembly	8	Tools and hardware, instructions, and clients/friends for manpower	February 2019 – 1 month
PROVIDE A CLEAN AND ORGANIZED ENVIRONMENT	Designate space for all pieces of equipment	9	N/A	February 2019 – 1 month
	Create cleaning schedule	10	Computer and printer, laminate	February 2019 – 1 month
	Follow cleaning schedule	11		March 2019 – Ongoing
	Always put equipment back in place	12	N/A	March 2019 - Ongoing
ATTRACT NEW CLIENTS	Create social media accounts (Facebook and Instagram)	13	Smart phone	February 2019 – 1 month
	Be present on social media	14	Smart phone	February 2019 - ongoing
	Create and distribute business cards	15	Smart phone	February 2019 – ongoing
	Create and distribute flyers	16		February 2019 – ongoing
	Encourage clients to spread the word about the new studio	17	Clients must be willing to spread the word	February 2019 – ongoing
MAINTAIN HIGH CLIENT RETENTION RATE	Create personal connections with clients	18	Interpersonal skills	March 2019 – ongoing
	Make sessions fun and enjoyable	19	N/A	March 2019 – ongoing
	Create a community that clients want to continue to be a part of	20	Myzone heart rate monitors	March 2019 – ongoing
	Record all sessions to track progress	21	Smart phone/iPad, The Training Notebook (application)	March 2019 – ongoing
	Offer monthly body scans to track progress	22	Omron BCM	March 2019 – ongoing
BE EFFICIENT OPERATORS	Create procedures and	23	N/A	March 2019 – ongoing

OF THE STUDIO	processes for running the studio			
	Be organized and stay on top of bills	24	Designated office space	March 2019 – ongoing
	Create monthly budgets to help reach goals	25	Designated office space, spreadsheet	March 2019 – ongoing
	Create clear and concise goals and expectations for number of clients and sessions per month based on current prices to cover fixed expenses	26	Spreadsheet	March 2019 – ongoing

Below follows a Gantt chart illustrating the timeline for each task established in Table 3.

Figure 2

Task Timeline



7 Milestones

Table 4 represents the key project milestones throughout the duration of the project.

Table 4

Project Milestones

Milestone Number	Title	Forecast date
1	Found perfect location for studio	14-Dec-2018
2	Purchased equipment 1	26-Dec-2018
	Purchased equipment 2	06-Feb-2019
3	Purchased equipment 3	27-Feb-2019
4	Signed lease	22-Jan-2019
5	Started moving into space	16-Feb-2019
6	LLC created	06-Feb-2019
7	Business license obtained	14-Feb-2019
8	Utilities turned on	22-Feb-2019
9	Started renovations	23-Feb-2019
10	First personal training sessions	04-Mar-2019
11	Created community using Myzone	21-Jun-2019

8 Metrics and Results

The objectives and success criteria for this project are discussed in sections 2.1.1 and 2.1.2. Below follows an overview of the established success criteria, the metrics collected, and the results of the project.

- 1. Successful opening of personal training studio that offers a clean, safe, and welcoming atmosphere to clients.** As the result of an extensive planning phase, SFPTS was opened on March 4, 2019. The studio offers a welcoming and safe environment in the form of bright colors, clean smells, an organized space, upbeat music, and friendly personal trainers. Most of the walls are white. However, one wall has a colorful pattern painted on it; on half of one wall hangs a motivation poster and a TV; and the other half is covered with pine wall panels decorated with the studio's logo. Yet another wall is covered with mirrors and a big whiteboard. The storefront is made up by a glass door and large windows. The door and windows are tinted which enforces privacy while still letting in a lot of natural light.
- 2. Acquisition of new clients.** When SFPTS opened, 16 clients followed from the old location. Additionally, we had 14 new personal training clients sign up that month. Within the first year of operating, we have had 53 new one-on-one personal training clients at SFPTS. The total number of individuals who have trained at the studio, whether they attended Bootcamp, small group training classes, or personal training, is 105.

Figure 3 is a line chart illustrating the number of new clients who signed up for personal training each month since opening the studio.

Figure 3*Monthly Client Signups*

3. **High client retention rates.** Of the 16 clients who followed from the old location and the 14 new clients acquired in the first month, 16 still come consistently. After 12 months of operating, the average client has been coming to the studio for one-on-one personal training for 5 months. While some clients only came to the studio to train for about a month, many of the total of 69 personal training clients have been coming consistently throughout the 12-month period. Some clients might have taken a couple of months off for various reasons (such as illness, injury, and travel); some moved away from town and thus stopped coming to the studio to train; and some clients started training at the studio shortly before the end of the first year of being in business. Factors aiding in the high retention rates are focus on building relationships with clients, monthly body metric scans, and Myzone community.

The monthly biometric scans were performed using an Omron Body Composition Monitor (Omron BCM). The Omron BCM features full body sensing with hand-to-foot technology and measures seven fitness indicators including body fat percentage, body mass index, skeletal muscle, resting metabolism, visceral fat, body age, and body weight (Omron Healthcare, Inc., 2020). We offer this scan free of charge to all clients on a monthly basis to encourage them to stay on track with their exercise and nutrition.

The Myzone community was created in June 2019. “Myzone is an innovative wearable heart rate-based system that uses wireless and cloud technology to accurately and conveniently monitor physical activity” (Myzone, 2020, para. 1).

We initially introduced the Myzone heart rate monitors to our clients to be better able to monitor their effort during the workouts at the studio and at home. However, we were very pleasantly surprised to discover how big of an impact the community aspect Myzone offers has had on SFPTS clients. While exercising, Myzone monitors client heart rate, calories burned, and time exercising, which is converted into Myzone Effort Points, or MEPs (Myzone, 2020). Myzone rewards effort rather than fitness level, which has proved to be a big motivational factor for many of our clients. By purchasing a Myzone heart rate monitor and becoming part of the SFPTS Myzone community, clients and the trainer can view the heart rate and calories burned on a TV screen at the studio during the training sessions. Additionally, they get access to the web-based community through an app where they get access to the statistics gathered during their sessions as well as to keep up with and compete with other SFPTS community members.

Figure 4 shows a line chart illustrating the number of personal training sessions Joseph has had each month since opening the personal training studio. The month before opening SFPTS is also included to illustrate the increase in sessions. Figure 5 illustrates the number of members joining our Myzone community each month since first introducing it in late June 2019.

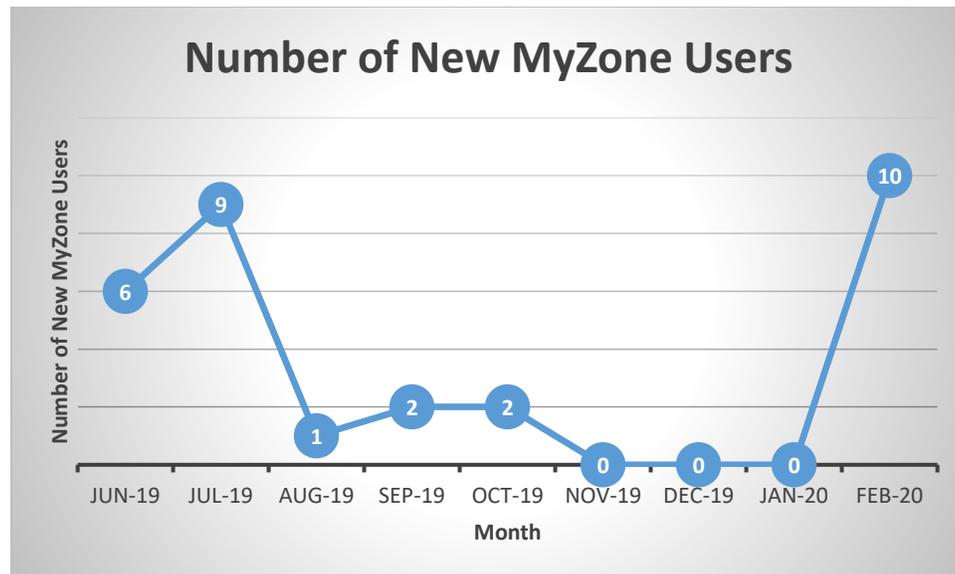
Figure 4

Number of Personal Training Sessions per Month



Figure 5

Number of Members Joining Myzone Community per Month



As we can see from Figure 5, we have had a total of 30 clients purchase a Myzone heart rate monitor and join our community since introducing it in June 2019. Today, only one of those 30 is no longer a client at SFPTS; thus, we are seeing very high retention rates among the clients who join our Myzone community.

4. **Maintaining a clean and organized space.** Each piece of equipment has its place at SFPTS. After being used, equipment is immediately cleaned and returned to its designated place. We have also created a weekly cleaning list. This list has been laminated and hung on the wall in the back room. The back room serves a dual purpose as office in one end and locker room in the other end. Clients come to this room prior to each session to hang their coats and leave their gym bags. When clients walk into this room, they can see the cleaning list and they will be assured the gym has been cleaned within a few days.
5. **Generate enough income from facility fees and day passes to cover monthly fixed costs.** We have been good at budgeting and setting clear and concise goals and expectations for how many personal training clients are needed each month to cover fixed costs. We have adjusted our goals and expectations monthly as needed. All personal training clients pay a monthly facility fee of either \$20 (clients who followed from old gym and those who joined when the studio first opened) or \$30 (clients who joined later); and those who attend Bootcamps have the choice between paying the \$30 monthly facility fee or \$5 day pass each time in addition to the \$10 Bootcamp fee.

We initially increased the facility fee from \$20/month to \$30/month because we would need 50 personal training clients at \$20/month to cover all fixed costs versus 34 clients at \$30/month. We expected to have more success with our Bootcamps and thus to be able to cover a larger part of monthly fixed costs with revenue accumulated from the Bootcamps. Relying on facility fees to cover the fixed costs, aiming for 34 personal training clients is a lot more realistic than 50. As abovementioned, we expected to have more success with our Bootcamps. However, in the colder months, Bootcamp attendance started decreasing significantly. In an effort to attract more people to join us for Bootcamps, we offered unlimited Bootcamps passes for \$40/month all in (i.e., no facility fee or day pass required for those who purchased the monthly pass). We had some success with the Bootcamp passes and decided to continue offering this deal. See Table 6 in section 10 financial plan for a breakdown of how monthly fixed costs were covered.

9 Risks, Constraints, Assumptions

9.1 Risks

The success of this project was highly dependent on us being able to find a location that checked close to, if not all, the boxes listed in the acceptance criteria in section 4.1 under “real estate research” (i.e., affordable, good size, offers outside area, etc.). Further, success was reliant on client retention and acquisition as well as being able to keep the facility at a high standard. Table 5 lists anticipated risks associated with the project, the level of risk associated with the scenario, and a mitigation plan. Each scenario is analyzed in greater detail in Table 5.

Table 5

Anticipated Risks

SCENARIO	LEVEL OF RISK	MITIGATION
DO NOT FIND PERFECT SPOT FOR STUDIO	Moderate	Compromise where possible
CANNOT FIND GOOD AND AFFORDABLE EQUIPMENT	Moderate	Only buy most essential equipment to start
CURRENT CLIENTS DO NOT FOLLOW TO NEW LOCATION	Low	
CURRENT CLIENTS FOLLOW BUT DO NOT STICK WITH IT	Moderate	Keep building relationships and community
THERE IS NO INCREASED INTEREST IN TRAINING WITH US	Moderate	Advertise on social media plus word of mouth
PEOPLE DO NOT KNOW ABOUT THE NEW STUDIO	Moderate	Advertise on social media plus word of mouth
UNABLE TO BRING IN ENOUGH MONEY TO COVER FIXED COSTS	Moderate	Budget, set monthly goals, adjust as needed
CLIENTS ARE NOT WILLING TO PAY HIGHER PRICES	Low	
WE GET BURNED OUT FROM ADDED RESPONSIBILITY	Moderate	Defined roles, constantly do small cleaning projects
WE ARE UNABLE TO KEEP THE SPACE CLEAN AND ORGANIZED	Low	

Below follows a more detailed description of each of the risk scenarios as well as a detailed mitigation plan for each of the moderate to high risk scenarios. The criteria for being evaluated as “high” risk was it had to be a scenario that we consider likely to become reality. Those with a risk factor labeled “medium” were considered likely to happen, and those evaluated “low” risk we did not anticipate becoming reality.

Do not find perfect spot for studio. We established seven acceptance criteria for the location of the studio (see “real estate research” under section 4.1). As we realized it might not be realistic to find a space that would check all the boxes within the given timeframe (June 2018 to December 2018), we were willing to compromise in some areas and ready to improvise in other areas. For example, if there was not a designated office or storage area, we were prepared to designate some space in the back of the room for office and supplies. Further, if we were unable to find a space with concrete walls, we were prepared to utilize power racks and cable crossovers as a substitute for hanging pull-up bars on the walls. Ideally, we would have liked for the studio to be located in an area connected to running trails; however, as long as we could do some simple exercises outside and run laps around the building, we were willing to compromise in this area as well. When it comes to monthly fixed costs such as rent and utilities, however, we were not willing to compromise. We were prepared to keep looking until we found a space that fit the budget and to compromise and improvise as much as necessary and possible in other areas.

Cannot find good and affordable equipment. In creating a safe and welcoming studio, we would need equipment that is of high quality, highly functional, and aesthetically pleasing. However, since the studio will not have high traffic throughout the days, top of the line equipment (like one would need for a large commercial gym) is not necessary. We knew it would be critical that we spent time researching all the exercise equipment manufacturers and suppliers to be sure we knew who offered the best deals for what we needed. In addition to reviewing differences in prices, we also considered customer reviews, shipping and handling fees, special offers and promotional deals, and delivery times. We expected to be able to find equipment that was up to our standard at affordable prices as long as we stayed informed of which companies offered the best equipment, who offered free delivery, and when special deals and promotions were offered.

Current clients follow but do not stick with it. Through casual conversations with current clients, we felt very confident that most, if not all, of them would follow us to the new location. However, we did consider it to be a moderate risk that some might not be completely happy with the new location and that they thus might want to go back to the old gym or somewhere completely new. In order to prevent this from happening, we did our best to make sure the new space would be everything our clients were looking for in a gym as well as continue to strengthen the bonds with our clients. Exercising is tough, and most people do not want to go to the gym every day. Therefore, it was imperative that we made the studio a positive experience and that we, as their personal trainers, continue to be someone that they look forward to seeing every time they come to work out.

There is no increased interest in training with us. With the opening of the new studio, we anticipated seeing a natural increase in interest in training with us solely based on the fact that we would be offering a new place for people to exercise. However, there was no guarantee that people would hear about us or that they would reach out about scheduling sessions. Therefore, it was important that we advertised through social media as well as asked our current clients to spread the word about the new location to mitigate this potential issue.

People do not know about the new studio. As abovementioned, we planned to mitigate the risk of people not knowing about our studio through social media and through current client word of mouth. Since we expected all our current clients to follow us to the new space, the desired number of new clients was not very high. We expected this mitigation plan would successfully eliminate the risk of people not knowing about the studio and thus get enough new clients.

Unable to bring in enough money to cover fixed costs. As we were hoping all our current clients would follow us to the new space, we did not want to increase their monthly facility fee. At the previous location, they paid \$20 per month, and we wanted to honor that price for as long as possible at the new studio. Based on anticipated monthly fixed costs of \$1,000 (\$800 rent plus \$200 utilities), and monthly facility fees of \$20, we would consistently need to have 50 personal training clients to cover fixed monthly costs. Fifty is a very high number of clients split between two people. Therefore, we mitigated the risk of not being able to cover fixed costs by offering monthly bootcamp package deals and by increasing the monthly facility fee to \$30 for new clients.

We get burned out from added responsibility. At the previous location, the only thing we had to worry about was training our clients and cleaning the equipment after use. We knew that once we opened the new studio, a high number of tasks would be added to the list. This includes cleaning tasks that need to be performed daily, weekly, and monthly; regular maintenance of equipment; accounting and bookkeeping; and advertising and marketing. Adding all of this on top of a busy training schedule can be very overwhelming and could potentially lead to us getting burned out. To mitigate this risk, we planned to “work smarter” by completing small cleaning and maintenance tasks whenever possible, whether it be while a client is warming up, while waiting for the next client to show up, during our lunch breaks, early morning, late at night, or on a day off from training. We designated space for all equipment to be stored when not in use, and we created cleaning lists to help us stay on track and keep the studio as close to spotless as possible.

9.2 Constraints

There were minimal constraints to the operations of this project. The most notable constraint was the budget. The budget limited the size of the space that we could afford. We were aware that finding a space approximately 1,000 sq. ft.

in size with an outside area that could be used as an extension to the gym and would include an office and an acceptable restroom and would fit the budget might prove difficult or even impossible. Further, instead of getting a treadmill, we planned to utilize the outside area for running. We did purchase a row machine and an assault bike, as these are more functional pieces of equipment that take up a lot less space. However, had the budget for the project been bigger, we would have considered adding a treadmill.

9.3 Assumptions

Some key assumptions made about this project follow below.

1. We will be able to find the perfect location and the perfect equipment.
2. Processes and procedures will be accepted and adapted.
3. Most of our current clients will follow us to the new location.
4. We will see an increase in clientele.
5. We will see an increase in client retention.
6. Clients will appreciate a clean and organized space.
7. Membership fees, walk-in fees, and bootcamp fees will cover fixed monthly costs.
8. A few clients might miss the abundance of weight machines and cardio equipment.
9. As SFPTS will be “by appointment only,” some people may be hesitant to pay the same or higher monthly facility fee compared to, for example, a 24-hour gym where they can work out whenever they want to.

10 Financial Plan

Below follows a financial plan based on monthly fixed costs. As mentioned in section 2.1.2, one of the acceptance criteria for this project was to be able to generate enough income from facility fees and day passes to cover monthly fixed costs. As mentioned under metrics and results in section 8, revenue accumulated from the Bootcamps would help cover fixed costs in months where facility fees and day passes did not suffice. Table 6 illustrates the percentage of fixed costs that were covered by facility fees, day passes, and Bootcamp fees respectively each month of the first year of being in business.

Table 6

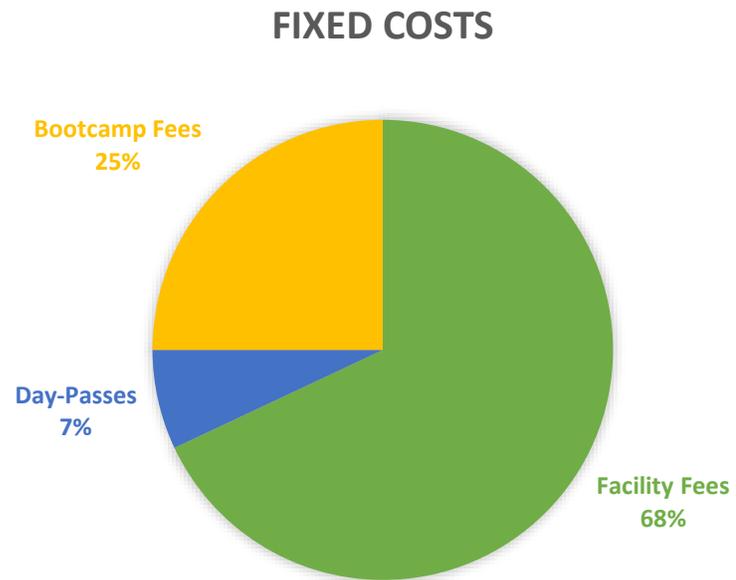
Financial Plan for Monthly Fixed Costs

MONTH	FACILITY FEES	DAY PASSES	BOOTCAMP FEES
March	65%	16%	19%
April	76%	7%	17%
May	67%	8%	25%
June	77%	7%	16%
July	64%	8%	28%
August	63%	7%	30%
September	73%	4%	23%
October	69%	2%	29%
November	69%	1%	30%
December	70%	6%	24%
January	67%	8%	25%
February	65%	4%	31%
TOTAL	68%	7%	25%

As evident from Table 6, throughout the first year of being in business, facility fees have covered 68% of the fixed costs, day passes covered 7%, and Bootcamp fees covered 25%. See Figure 6 for a pie chart illustrating the percentage of fixed costs that were covered by facility fees, day passes, and Bootcamp fees respectively for the first year of being in business.

Figure 6

Fixed Costs First Year of Business



11 Quality Assurance Plan

The *Observe, Plan, Do, Check, Act/Adjust* quality assurance process cycle was used as the basis for the quality assurance plan. The plan includes actions to measure the effectiveness of project plan phases. As listed in section 2.1.1, the goals for the project were as follows:

- Create a personal training studio that serves as a safe and welcoming space for experienced exercisers as well as individuals who are new to exercise,
- Provide a clean and organized environment for clients to reach their goals,
- Attract new clients,
- Increase client retention rate, and
- Efficient operation of the studio.

Below follows the quality assurance plan for each of the project goals.

Table 7

Quality Assurance Plan

Create a personal training studio that serves as a safe and welcoming space for experienced exercisers as well as individuals who are new to exercise				
Observe	Plan	Do	Check	Act/Adjust
Identify need for personal training studio, identify competition	Create budget, research required licenses,	Research the real estate and exercise equipment market	Does location and equipment meet established acceptance criteria?	Sign lease, order equipment
Provide a clean and organized environment for clients to reach their goals				
Observe	Plan	Do	Check	Act/Adjust
Order equipment that takes up little space and serves dual purpose, identify areas to be cleaned daily/weekly	Designate space for all equipment, create cleaning schedule	Always put equipment back in place, follow cleaning schedule	Informal oral surveying of client level of satisfaction	Adjust cleaning schedule as needed
Attract new clients				
Observe	Plan	Do	Check	Act/Adjust
How many clients will follow to new space? How	Create marketing plan	Advertise on social media, distribute	Did all current clients follow to new space? How many	Be more visible online

many clients are needed to cover fixed costs?		business cards and flyers	new clients have signed up?	
Increase client retention rate				
Observe	Plan	Do	Check	Act/Adjust
Number of current clients	Create plan to encourage clients to keep coming back	Implement plans (build relationships, create community, etc.)	Compare retention rates on a monthly basis	If retention rates do not increase, we must create and implement new retention strategies
Efficient operation of the studio				
Observe	Plan	Do	Check	Act/Adjust
Do fees collected cover fixed costs?	Create plan to generate higher income	Implement plans (increase facility fee, offer deal on Bootcamp passes, etc.)	Did implementing plans generate higher income to cover fixed costs?	If initiatives are not successful, rates must be adjusted

Appendix A

Joseph's (owner) Client Retention Breakdown

C#	Pri	M	A	M	J	J	A	S	O	N	D	J	F	#M	Mz
1	y	y	y	y	y	y	y	y	y	y	y	y	y	12	n
2	y	y	n	n	n	n	n	n	n	n	n	n	n	1	n
3	y	y	y	y	y	y	y	y	y	y	y	y	y	12	y
4		y	y	y	n	n	n	n	n	n	n	n	n	3	n
5		y	y	y	y	n	y	y	y	y	y	y	n	11	y
6		y	y	y	n	n	n	n	n	n	n	n	n	3	n
7		y	y	y	n	n	n	n	n	n	n	n	n	3	n
8		y	y	n	n	n	n	n	n	n	n	n	n	2	n
9		y	y	y	y	y	y	y	y	y	y	y	y	12	y
10		y	y	y	y	y	y	y	y	y	n	n	n	9	n
11		y	y	y	y	y	y	y	y	y	n	n	n	9	n
12		y	n	n	n	n	n	y	y	y	y	y	y	7	n
13		y	y	n	n	n	n	n	n	n	n	n	n	2	n
14		y	y	y	n	n	n	n	n	n	n	n	n	3	n
15			y	y	n	n	n	n	n	n	n	n	n	2	n
16			y	n	n	n	n	n	n	n	n	n	n	1	n
17			y	y	y	y	n	n	n	n	n	n	n	4	n
18			y	n	n	n	n	n	n	n	n	n	n	1	n
19			y	y	y	y	y	y	y	y	n	y	y	10	n
20				y	y	y	y	y	y	y	y	n	y	9	y
21				y	y	n	n	n	n	y	n	n	n	3	n
22					y	y	n	n	n	n	n	n	n	2	n
23					y	y	y	y	y	y	y	y	y	9	y
24						y	y	y	n	n	n	n	n	3	n
25						y	y	n	y	y	y	y	n	6	y
26						y	y	n	n	n	n	n	n	2	n
27						y	y	n	n	n	n	n	n	2	n
28							y	y	n	y	n	y	y	5	n
29									y	y	n	y	y	4	y
30								y	n	n	n	n	n	1	n
31										y	n	n	n	1	n
32												y	n	1	n
33												y	y	2	n
34												y	y	2	n
35												y	y	2	y
36												y	y	2	y
37												y	y	2	y
38												y	y	2	y
39												y	y	2	y

The far-left column labeled “C#” represents each of Joseph’s personal training clients. The second column, labeled “Pri” illustrates which clients were already training with him before opening the new studio. The following 12 columns represent the first 12 months of being in business, starting with March of 2019 and ending February 2020. Months colored green containing a “y” means that the client was training with Joseph that particular month, and red “n” means they did not. Next, the column labeled “#M” illustrates the number of months each client has been coming to train with Joseph (not including any time prior to opening SFPTS). Finally, the far-right column labeled “Mz” indicates whether clients have (blue “y”) or have not (white “n”) purchased a Myzone heart rate monitor and joined our community. On average, Joseph’s clients have been coming to train with him for 4.3 months. The average is higher for the clients who have purchased a Myzone heart rate monitor as those clients have been coming on average for 6.1 months versus 3.5 months for those who do not have a Myzone.

Appendix B

Professional Literature Review

The partnering organization for this project is what is today known as Silly Fitness Personal Training Studio (SFPTS). SFPTS opened its doors to customers early in March 2019 and is a private personal training studio located in Danville, Virginia. The owner of SFPTS is Joseph Adkins, and it is operated by Joseph and me. Joseph and I also serve as the two personal trainers at the studio. A personal trainer is someone who designs individualized, effective and safe health and fitness programs. Personal trainers guide clients towards their health and fitness goals whether they are focused on performance, weight loss, or strength gain. At SFPTS, training sessions are offered in the form of one-on-one personal training, partner workouts, small group workouts, and larger group classes known as Bootcamps. Prior to opening in 2019, SFPTS was just a dream; and through this consultancy project, I have helped make it a reality.

The challenge faced by the partnering organization was the lack of a space for personal training that is nice and clean and feels like a welcoming and safe place for clients. Additionally, there was a lack of strategies for obtaining and retaining clients. Articles were reviewed and sorted based on common themes relevant to the project. The themes are as follows: (a) starting a business/entrepreneurship, (b) obtaining and retaining clients, (c) the future of the fitness industry, (d) boutique fitness, and (e) branding.

Starting a Business/Entrepreneurship

This theme covers topics and ideas to consider before starting your own business. Urquhart-Brown's (2008) book is packed with practical tools and powerful insight and

strategies to take your business to the next level. This book covers themes such as “myths about going into business by yourself,” “ten traits of the successful entrepreneur,” “a checklist for setting up your business,” “six secrets of marketing your business,” and “the simple ways to get referrals.”

Fable (2019) discussed different paths to becoming an entrepreneur in the fitness industry specifically. Fable discussed pros and cons of training at your facility as opposed to mobile training and digital training. Mobile training allows customers to work out in the comfort of their own home, at their place of work, at a park, or at any other location. As a personal trainer, the pros of opting for mobile training are that you will be able to get started quickly with minimal startup cash. All you need for this model is a reliable mode of transportation, access to equipment, and a way to book clients and collect money. Since you will meet clients at their house or at a park, you are not required to have a physical location for your business, and you do not need a lot of expensive equipment; thus, your overhead will be low. On the flip side, training remotely requires a lot of time spent traveling from one client to the next; thus, the cons are less billable hours, significant wear and tear on your vehicle, and high gas expenses. Fable suggested trainers who choose this model set their rates to accommodate the wear and tear on their car, gas costs, and time spent traveling to and from a training session.

Digital training also allows for customers to exercise in the comfort of their own home, at the park, or anywhere else. With digital training, trainers deliver the training programs through an online platform. The workouts may take the form of a live Zoom session where the trainer and client have the ability to see each other and communicate during the sessions, they might be prerecorded sessions that clients can access from a

website, or they could take the form of a written document detailing each exercise.

Digital training requires a lot more time to plan; however, it offers the benefits of great flexibility and the possibility of making money in your sleep if you create an effective system. Such systems will allow for automated enrollment of clients to prerecorded programs that fit their needs based on their answers to a few questions on your website. Like mobile training, digital training does not require a lot of fancy equipment. All you need is equipment to demonstrate exercises (if you have a membership to a gym you can shoot your demo videos there) and digital tools such as a camera, editing programs, and a video sharing service such as YouTube or Zoom. The main disadvantage to this model is that it requires more time in the planning process as you will need to create a platform (such as a website) for clients to access your content, and you have to create enough content to be able to get your first clients started. This may include creating several training programs based on different needs (i.e., a program for clients with no injuries or limitations, a program for clients with a history of knee problems, a program for clients who do not have access to any equipment, a program for clients who want to lose weight, etc.) and recording and editing demonstration videos. In addition to this, you also have to advertise for your digital business and establish payment methods and methods for communicating with clients.

Training at your own facility requires taking a risk. Overhead costs will be significantly higher than the other two models, and the planning process will take longer. You will have to purchase or rent a space and equipment to use for all sessions. The planning process will include elements such as securing licenses and permits, researching the real estate market in the area as well as purchasing or signing a lease, researching and

purchasing exercise equipment, planning the layout of the space, and undertaking any rehabilitation work necessary. The pros include more freedom to set your own schedule, you get to train at a facility that you designed, and it gives you the ability to train clients back to back which increases the amount of billable hours.

Both resources discuss pros and cons of entrepreneurship. Fable (2019) offered a superficial review of entrepreneurial options for creating a personal training business specifically. Urquhart-Brown (2008), on the other hand, did not target members of a specific industry and took a deep dive into all aspects to consider before opening your own business. Such aspects include ways to get referrals, traits of the successful entrepreneur, and ideas for setting up and marketing your business. For example, one section of the book is titled “A checklist for setting up your business.” In this section, Urquhart-Brown covered in great detail the processes of ensuring your business name, obtaining a business license, obtaining seller’s permit, obtaining insurance, and deciding on business structures. The aforementioned processes are all necessary to undertake before you can start operating your business. In most cases, you will not be able to sign a lease to rent a space without proof of a business license, seller’s permit, and insurance. Even further, you will not be able to obtain those permits without first obtaining a business name. Ensuring your business name is also important because this is a big part of your brand identity. The business name is how customers identify your business. Therefore, it is important to choose a name that is descriptive of your business and that people will remember and recognize. The naming process will be covered in greater detail under the theme branding.

Obtaining and Retaining Clients

In order to be a successful personal trainer, one must have clients. Constantly working to obtain new clients can be very difficult, especially in a highly competitive market. By increasing client retention, personal trainers can spend more time working with existing clients and less time chasing potential new clients. This theme covers tips and tricks to obtaining and retaining clients.

Bratcher (2008) emphasized that although you as a personal trainer do have the credentials that say you are an expert in the area of health and fitness, you should not promote yourself as the expert or authority, as this unintentionally creates an imbalance in the relationships. Such imbalance may cost you, in the form of losing clients, in the long run. When clients feel like they are a subordinate to you, they rely on you to supply them with all the necessary information regarding their health and fitness. Therefore, they will also believe that you are responsible for the final outcome (i.e., their weight loss and strength gain, or lack thereof). Consequently, when they do not meet their goals, they blame you and walk out the door.

Bratcher (2008) went on to explain why viewing yourself as a facilitator is a superior way to ensure client retention. Bratcher explained that as a facilitator, you use your expertise to promote health and fitness goals and develop a plan to reach those goals. Bratcher noted, “This makes clients feel a greater sense of accomplishment and control because they achieve meaningful goals they helped create for themselves rather than objectives set out by someone else” (“Be a Facilitator, Not an Expert,” para. 5).

Hutson (2015) suggested that appearance and physical abilities may matter just as much as specialized knowledge or role (i.e., “trainer”) when it comes to trainer/client

relationships. The concept of bodily capital encompasses “athletic prowess, attractiveness, physique, muscle tone/strength, agility, and other modes of embodiment” (Hutson, 2015, p. 5). Through the concept of bodily capital, Hutson investigated how, in addition to “roles” and “specialized knowledge,” bodies, appearances, and physical abilities play a role in interactions across status differences. Hutson explained that “bodily capital provides a way to understand why individuals invest time, energy, and resources into their bodies, and what they expect to receive in return” (p. 5). Among other factors, Hutson described how female trainers might gain respect from male clients as well as how younger trainers might strengthen authority with clients in higher status locations. Hutson concluded that in order to be successful, trainers must have a defined role, specialized knowledge, and bodily capital.

Lai (2019) discussed the extensive potential for wearable technology to motivate, challenge, and ignite a competitive spirit in gym goers; thus, the use of such devices could lead to a notable increase in member retention. Wearable technology includes devices such as Fitbit, Garmin vívoactive, Polar H9, Apple Watch, and Myzone. These devices provide the ability for users to track fitness data such as sleep, calories burned, number of steps walked, heart rate, and exercise tracking. Further, these devices make goal setting and progress tracking simple, as they can connect to smartphone apps to track long-term progress. According Lai, the utilization of wearable technology helps clients become more active and involved in their own fitness and, as a by-product, more engaged and motivated to continue.

Although these three articles cover three very different approaches, they are similar in that they all cover factors crucial in obtaining and retaining clients as well as

building strong relationships with clients. The articles are different in that the bulk of Bratcher's (2008) article focused on explaining why client retention is so crucial for the bottom line, while Hutson (2015) summarized his qualitative research findings related to building and sustaining client relationships, and Lai (2019) focused solely on how introducing wearable technology might aid in client retention.

What the three articles have in common is that they all offer valuable approaches to client retention. First, Bratcher (2008) explained how to create a balance in the trainer/client relationship and how this is a more effective retention strategy than taking on an expert or authority role. Second, Hutson (2015) expanded on the popular belief that defined role and specialized knowledge are the key factors to client retention by highlighting the importance of bodily capital. Hutson explained how bodily capital may challenge some status hierarchies. Thus, these two articles are similar in that they both touch on the significance of roles and relationships in client retention. Finally, Lai's (2019) article is different from the previous two in that it does not touch on roles and relationships. Rather, it discusses a different way to encourage clients to stay motivated and to keep coming back.

The Future of the Fitness Industry

As a competitor in the fitness industry, it is important to be able to foresee and prepare for where the industry might be headed in the foreseeable future in order to not fall behind competitors. If your competitors successfully follow market trends and you do not, you risk losing a significant number of customers to those competitors because they are offering them something they want, and you are not.

Beck (2018) discussed different ways the industry might grow and change over the next 10 years. Beck discussed factors such as real estate, change in customer demographics, hybrid establishments, and technology. Some of these changes have already been introduced to the industry, while others might take a few more years to become relevant. For example, Beck noted that “as the retail sector continues to take hits from companies downsizing or going out of business, landlords of shopping centers and regional malls with vacant junior and big-box anchor stores are looking to make a deal” (“Fewer freestanding locations”). Beck suggested that gyms and fitness centers, especially the smaller chains and boutique formats, can capitalize on lower rents as landlords scramble to fill empty spaces and drive traffic to other stores within their centers. Further, Beck suggested fitness centers might need to “rethink their location strategies as a significant percentage of the U.S. population ages and turns to fitness, rehabilitation and other wellness services to prolong and enhance quality of life” (“Aging customer base”). Thus, Beck suggested traditional fitness clubs could begin opening in active adult residential communities, assisted living facilities, or medical and hospital complexes to meet this customer base. As it relates to technology, Beck believed the use of technology will help gyms and consumers interact effortlessly. He predicted the future of fitness will include having your personal trainer or spin class instructor be able to access your daily activity log and provide remote coaching and motivation.

Barry (2019) explained how members of the fitness industry can prep for the upcoming changes and growing trends in the fitness industry. Some key takeaways are to embrace technology, become data-driven, look outside the industry to learn best practices, deliver to Millennials and Gen Zs, deliver the currency of convenience, and

build an awesome boutique vibe. As it relates to embracing technology, Barry mentioned that boutiques use booking; payment and promotional platforms; and in-studio, high-tech touches like heart rate tracking. Barry noted, “many brands have demonstrated that engaging a remote community based on livestreaming, leaderboards and data tracking is a thriving proposition” (“Embracing Technology and Being Human,” para. 3). Further, Barry suggested catering to the wants and needs of the Gen Z and Millennial: “according to the 2019 Global Consumer Fitness Survey by Les Mills, 80% of all those attending a gym are Gen Z or millennial, so make sure you are tuned in to their wants and needs” (“Fitness Industry Lifecycle,” para. 9).

These two articles have many similarities. The most obvious being that they both discussed the future of the fitness industry. Both articles emphasized technology as an important aspect of the future of the industry. Beck (2018) provided insight into trends to look out for in the industry, while Barry (2019) suggested measures to take to be able to adapt with the changing industry. Beck looked a little further into the future, while Barry discussed changes that are crucial in the immediate future. Another notable difference is that Beck emphasized the industry has an aging customer base and thus suggested gyms may need to rethink their location strategies to better cater to this significant portion of the population. Barry, on the other hand, suggested catering to the much younger Gen Zs and Millennials.

Boutique Fitness

Boutique fitness has been growing exponentially over the last 10 years, and experts believe there is still plenty of opportunity for the market to expand. A boutique studio is generally viewed as either a luxury gym or a small gym (800-3,500 square feet)

that often focuses on group exercise and specializes in one or two fitness areas. An example of a luxury boutique gym is Equinox. Members pay thousands of dollars annually for access to luxuries such as fitness assessments, steam rooms, massages, facials, chilled eucalyptus towels, designated permanent locker rental, laundry service, and unlimited classes. Examples of small boutique gyms are SoulCycle, which specializes in spinning classes, and Barry's Bootcamp, which combines running and weights for a high intensity interval workout.

Concepcion (2020) explained the success of boutique studios in recent years. Concepcion also compared the growth of boutique studios to that of commercial gyms. According to Concepcion, the number of consumers who reported being members of boutique studios in the United States grew by 121% from 2012 to 2017, compared to 18% growth experienced by commercial fitness facilities over the same period. Some key factors listed as contributing to boutique fitness studio growth compared to commercial gyms were convenient locations, sense of community, intimate environments, efficiency, and personalization.

It is noteworthy that Concepcion (2020) focused on the San Diego, California boutique fitness market. The city is at the forefront of the boutique gym movement because it is a great test market. The audience is very fit, health focused, and very motivated to stay active and stay outdoors. Differences in factors such as the aforementioned must be taken into consideration in areas of cold and wet climates, where the income levels are lower, and where the population is not currently health and fitness focused. In such areas, people may not have the means and motivation to prioritize budgeting for a membership at a boutique studio.

Frank (2020) looked at the boutique fitness market from Detroit, Michigan. Although other articles I have read remain optimistic in regard to continued growth in the industry, Frank described clusters of businesses in the market. Boutique studio owners describe challenges keeping customers from areas where there are more options. Like Concepcion (2020), Frank explained why today's members have migrated toward boutique studios; it has a lot to do with their ability to engage, support, encourage, and inspire people.

Huard (2020) also focused on San Diego, California. Huard described boutique fitness and health clubs as one of the main drivers in the increase in retail space occupancy in San Diego County in 2019, with rents and leasing activity on the rise at year's end with prospects for a solid year in 2020. Although this article is based on trends in a specific geographical market, it could serve as an indicator for other parts of the country as they follow in the trend of boutique fitness.

Branding

Kohli and LaBahn (1995) discussed the importance of choosing a strong brand name. Kohli and LaBahn described the process companies use to create, evaluate, and select new brands and refer to results found across various industries. Kohli and LaBahn provided a rich description of the branding process, including the tasks to undertake, the methods available, and the evaluation criteria to consider. In this regard, managers should (a) set clear objectives for the naming process, (b) create a reasonably long list of candidate brand names, (c) conduct a thorough evaluation of the candidate names, (d) systematically apply the objectives and criteria choosing the final brand name, and (e)

choose four to five names for submission to the Patent and Trademark Office for registration (Kohli & LaBahn, 1995).

Curley (2020) focused on branding in the fitness industry specifically. Curley broke down what branding is and why it is so important, provided examples of great fitness branding, and provided 10 steps to creating a brand identity for your brand. The 10 steps encourage readers to answer questions such as what they would like to contribute to the industry and why, research their competition to uncover what they are doing right and wrong and how they can set themselves apart from them and their brand, identify their customers and their desires, and write a mission statement. Further, the reader is encouraged to choose an appropriate name; maintain consistent brand identity; create helpful content and share inspirational stories; run marketing campaigns; analyze marketing data and learn from it; and finally, ask their customers for feedback and implement it (Curley, 2020).

These articles are similar in that they both touch on the process of choosing the right name for the business. Curley (2020) briefly covered this step of the branding process in a paragraph, while Kohli and LaBahn (1995) covered the topic in an in-depth research paper. Curley merely encouraged readers to choose a name and visuals that embody the brand values, while Kohli and LaBahn provided a rich description of the process, methods, and evaluation criteria to consider.

Summary

The literature reviewed is conclusive and indicate that the fitness industry as a whole will continue to grow in the foreseeable future. The boutique fitness market is growing at an even more rapid pace than the commercial fitness industry. Therefore, for

new entrants to the market, a great strategy is to strive to create a community that is inclusive with close follow-up of members/clients and to provide a space that is welcoming and conveniently located. Additionally, it will become increasingly more important to build strong relationships as well as to integrate technology, including wearable technology. It is also evident that creating a strong brand and brand recognition is important. Branding includes the obvious elements such as name and logo as well as color scheme, visual elements, venue, web design, product, values, and any other component of the business.

As mentioned in the introduction to this paper, the challenges faced by the partnering organization are as follows: lack of a space for personal training that is nice and clean and feels like a welcoming and safe place for clients and lack of strategies for obtaining and retaining clients and processes for operating a personal training studio efficiently.

The articles reviewed aided in finding answers to the majority of the problems faced by the organization. The most relevant findings from the literature are those related to trainer/client relationships and client retention as well as those related to creating strong brand identity. Findings related to boutique fitness have been very valuable, as our personal training studio falls into this category. In addition, the literature reviewed relating to entrepreneurship and starting a new business has been valuable in this process.

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