

CLIENT SHOPPER

Complimentary Session Evaluation

Note to Client Shopper: Please read through this evaluation form beforehand so you are familiar with the criteria. Be sure not to let anyone know you are evaluating them. Complete this evaluation form immediately afterwards so you can provide very specific comments and examples. Return the completed evaluation form in a sealed envelope addressed to Sherri McMillan.

Client Shopper: _____ Phone Number: _____

Appointment Date/Time: _____ NWPT Trainer: _____

CSR(s) on shift: _____ Other NWPT Team Members: _____

1. Did you receive a call from a CSR to confirm your appointment? YES NO
2. Were you instructed on location/directions, parking, attire, cancellation policy and provided with general instructions on what to expect before your appointment? YES NO
3. Did you receive a call from your trainer before your appointment? YES NO
4. Did your trainer ensure they received the questionnaire back before the appointment? YES NO
5. When you arrived, were you greeted warmly by a CSR? YES NO
6. Did your session start on time? YES NO
7. Did your trainer greet you warmly and make you feel instantly comfortable? YES NO
8. Were you introduced to other NWPT team members and clients? YES NO
9. If it was your first time into our studio, were you offered a tour? YES NO
10. Were the NWPT CSRs dressed professionally? YES NO
11. Was your NWPT trainer dressed athletic and professional? YES NO
12. Was the NWPT training studio clean? YES NO
13. Was your trainers' office neat and organized? YES NO
14. Did your trainer appear to be prepared and organized? YES NO
15. Did your trainer provide you with a black NWPT folder and briefly explain its components? YES NO
16. Did your trainer include their bio, business card and three educational articles inside the black NWPT folder for you? YES NO
17. Were the materials inside the black folder and the handouts that were given to you photocopied and printed beautifully and was their appearance professional? YES NO

18. Did your trainer thank you for taking the time to complete the Client Information Questionnaire (CIQ)? YES NO
19. Did your trainer tell you that they read through the CIQ fully and have highlighted with a highlighter marker the key areas from the CIQ that they wanted to discuss with you? YES NO
20. Did your trainer spend about 5-6 minutes briefly discussing some key areas from the CIQ and highlighting future action plans? YES NO
21. Did your trainer briefly explain to you the Lifestyle forms “4 Steps for Developing a Foundation for Success” and assign them to you for homework? YES NO
22. Did your trainer review a proposed Weekly Workout Structure with you? YES NO
23. Did your trainer have you sign a Fitness Contract? YES NO
24. Did your trainer perform an Initial Fitness Assessment on you and complete it fully? YES NO
25. Did your trainer take your Blood Pressure? YES NO
26. How did you feel during the assessment phase?
27. Did your trainer ask you if you would like to take measurements to monitor progress? YES NO
28. If you decided to do measurements, did your trainer let you know they’d take these at your next appointment? YES NO
29. Did your trainer instruct you that you’d have about 10 minutes to perform some physical activity/exercises and ask you what you would like to focus on during that time? YES NO
30. Did your trainer use about 10 minutes to perform some physical exercises/activity? YES NO
31. Did your trainer conduct the activity segment utilizing effective communication and strong teaching skills? YES NO
32. Did your trainer spend the last 10 minutes of the session providing training/membership options and deciding how the two of you would work together to help you achieve your goals? YES NO
33. Did your trainer ask for your business? YES NO
34. Did your trainer provide you with homework and activity actions plans until your next appointment? YES NO
35. Did your trainer photocopy any exercises for you that you covered that day? YES NO
36. Did your trainer photocopy the weekly structure for you and give you the fitness contract to take with you? YES NO
37. Once the session was over, did your trainer communicate the details to a CSR so they could finalize all details with you (Purchasing of sessions, scheduling of future appointments etc.) YES NO
38. Did the CSR efficiently and effectively ring up your sale and schedule your future appointments and provide you with an appointment card? YES NO

39. Was our cancellation policy clearly communicated to you? YES NO
40. Did your trainer take notes during the session? YES NO
41. Did your session finish on time? YES NO
42. What was your general impression of the complimentary session?

43. What was your general impression of your trainer?

44. Did your trainer call you within 24 hours to thank you and check in on you? YES NO
45. Did you receive a thank you letter from your trainer within one week of your first session?
YES NO
46. Did NWPT send a letter to your physician? YES NO
47. Did NWPT add your email address to their email data-base? YES NO
48. Did you receive new client "Welcome Gift Certificates" for massage and facial services?
YES NO

SCORE: _____ (total yes scores) / _____ (total possible scores) = _____%

STRENGTHS:

AREAS FOR IMPROVEMENT:
