

Sfrito Assessment Guideline

Unit 7062

Level 4: Credit 4: Version 3

Fitness Assessment and Individual Instruction

Establish a personal training client base

Activity Instructions:

Candidates can be assessed by

1. Written documentation as described in 'Task'
2. Oral questioning/ interviewing
3. Observation of practical demonstrations (Refer Performance Criteria 5.2 and 5.3 only)

Note:

- Assessors must be familiar with the relevant provisions of the Fair Trading Act 1987 (FTA), the Consumer Guarantees Act 1993 (CGA) and the Privacy Act 1993 (PA).
- It is suggested that the preparation and implementation of a marketing plan/ strategy should occur prior to this assessment, so that analysis of the marketing campaign can occur as part of the assessment process (refer Elements 1 and 2).

Purpose statement:

People credited with this unit standard are able to: investigate the market for personal training services within a facility, a geographical area, and a target population; prepare and implement a self marketing campaign; establish business relationships with fitness and/or recreation establishments; maintain records pertaining to a personal training operation; and implement reliable service delivery of personal training service.

Special Notes:

1. Personal training refers to fitness instruction supplied to an individual or small group where clients pay by the session for instruction by a specified trainer. A personal trainer may be paid directly by clients or employed within a fitness and/or recreation enterprise - if the latter, remuneration for personal training service provision is by the session and not by the hour or by way of salary.
2. Business practices incorporated in the skills learnt in this unit standard comply with the relevant provisions of the Fair Trading Act, 1987 (FTA) and the Consumer Guarantees Act, 1993 (CGA).
3. Record keeping and use of client information involved in this unit standard comply with the relevant provisions of the Privacy Act, 1993 (PA).

Element 1: Investigate the market for personal training services within a facility, a geographical area, and a target population.

Task: Written documentation and/or oral questioning/interview

Performance Criteria		Evidence
1.1	<p>Methods of investigation are identified and described in terms of suitability for the service and the facility.</p> <p>Range: methods include - notice, pick up questionnaire, sample questionnaire, sample interview, random sample questionnaire, random sample interview, analysis of demographic data, analysis of existing personal training activity, analysis of trends; practicality - cost, material resources, time, quality of information.</p>	<ul style="list-style-type: none"> • Candidate is able to <u>identify</u> and <u>describe</u> various investigative market methods which suit the service and the facility. (Answer to include all of range statement) e.g. <ul style="list-style-type: none"> - Notice - Sample questionnaire - Trend analysis etc. • Description of investigative methods should include practicality issues such as : <ul style="list-style-type: none"> - Cost - Material resources - Time - Quality of information
1.2	<p>Investigation methods and procedures for examining demand within a facility are implemented to match the proposed service and facility requirements.</p>	<ul style="list-style-type: none"> • Candidate is able to demonstrate competence in implementing at least two, (2) of the investigative methods listed in range statement in 1.1, specific to the fitness facility: - methods and implementation of methods should match the proposed service and facility requirements. i.e. candidate to choose two, (2) target markets for the personal training service and design marketing investigative methods specific to their chosen target markets. e.g. documentation to include design of survey/ interview questions/ analysis of existing personal training activity in the facility etc.
1.3	<p>Investigation methods and procedures for examining demand within a geographical area cover the area and are implemented to match the proposed service.</p>	<ul style="list-style-type: none"> • candidate is able to demonstrate competence in designing and implementing investigative methods, to examine the demand for their proposed service(s) within a specified geographic area, e.g. <ul style="list-style-type: none"> - analysis of demographic data of the area - analysis of current personal training activity in the area (competitor analysis) - design of a questionnaire etc. which examines the demand for their service(s) within the geographical location

1.4	Investigation methods and procedures for examining demand within a target population match the characteristics of the target population and are implemented to match the proposed service.	<ul style="list-style-type: none"> • Candidate is able to demonstrate competence in designing and implementing investigative methods and procedures for a designated target population e.g. weight loss clients, sports specific clients, corporate groups etc. • Candidate should demonstrate the ability to match the needs of the target group to the proposed personal training service on offer. <p>Note: suggest that assessment occurs at least 4-6 weeks after implementation of the marketing campaign, so that the campaign outcome can be analysed as part of the assessment process.</p>
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Element 2: Prepare and implement a self marketing campaign.

Task: Written documentation and/or oral questioning/interview

	Performance Criteria	Evidence
2.1	Analysis of own resources is carried out in terms of strengths and needs related to the marketing, selling, and provision of personal training services.	<ul style="list-style-type: none"> • Candidate is able to demonstrate competence in analysing their own resources and abilities relating to the marketing, selling and provision of Personal Training services e.g. SWOT analysis designed by the candidate.
2.2	<p>Marketing messages relating to personal training services are identified in terms of benefits for the target market.</p> <p>Range: benefits include - health, appearance, weight management, performance, stress management, self-esteem, social, fashion and/or style.</p>	<ul style="list-style-type: none"> • Candidate is able to identify and relate the benefits of their Personal Training services to their chosen target market(s) in their advertising/marketing campaign. • Answer to include all of range statement listed.
2.3	<p>Marketing plan preparation meets planning needs of personal trainer and employer requirements if applicable.</p> <p>Range: product definition, pricing, market definition, message, channel, goals and objectives, time management, budget.</p>	<ul style="list-style-type: none"> • Candidate is able to demonstrate competence in preparing a marketing plan/ advertising campaign, which meets his/ her needs and employer needs (if applicable). • Assessor should ensure reference is made to all aspects of the range statement in the candidate's documentation; i.e. product definition, pricing etc.
2.4	Implementation of self-marketing campaign is carried out in accordance with marketing plan.	<ul style="list-style-type: none"> • Candidate implements or has implemented the marketing campaign for his/ her personal training services, and assessor has viewed evidence of this from whatever marketing method was chosen, eg. flyer, advertisement, membership letter via mail-out, etc. • Candidate has analysed the outcome of the marketing campaign and noted the variables affecting its success or failure. <p>Note: suggest that a minimum of 4-6 week period has passed from implementing the marketing campaign to assessing its outcome.</p>

Element 3: Establish business relationships with fitness and/or recreation establishments.

Task: Written documentation and/or oral questioning/interview

	Performance Criteria	Evidence
3.1	<p>Operational and financial outcomes of providing personal training services within a fitness and/or recreation establishment are identified, and are analysed in terms of costs and benefits for parties involved.</p> <p>Range: compatibility with existing staff and services, facility use issues, client identification issues, marketing issues (in-centre, external), money management issues.</p>	<p>Candidate demonstrates the ability to identify operational and financial issues relating to the provision of personal training services within the fitness and/ or recreation establishment. E.g. development of a financial plan.</p> <p>Answer(s) to include analysis of costs and benefits for parties involved, e.g:</p> <p>Compatibility with existing staff and services Facility use issues, e.g. access to equipment etc. Client identification issues, e.g. member/ non-member status Marketing issues, e.g. access to membership database etc.</p>
3.2	<p>Contract is negotiated and meets enterprise objectives for the personal trainer and the facility operator.</p> <p>Range: conditions of service, times available, access to existing facility clients, conditions for in-centre marketing and external marketing, financial conditions, handling of fees and payments, assignment of liabilities under consumer and health and safety legislation where applicable.</p>	<ul style="list-style-type: none"> • Candidate demonstrates the ability to negotiate the contract with the facility operator and therefore accepts and meets both the objectives of the operator and the candidate. E.g. understands contract. • <u>Evidence</u> could be obtained by: <ul style="list-style-type: none"> - The assessor viewing a current signed contract. - Explanation by the candidate of contract content, to assess candidates understanding of contractual issues. - Discussion with facility operator, or similar manager/ supervisor, about whether the candidate meets the performance criteria stated.
3.3	<p>Implementation of personal training services within a fitness and/or recreation facility meets facility requirements and matches trainer resources.</p>	<ul style="list-style-type: none"> • Candidate demonstrates the ability to implement personal training services within a fitness and/ or recreation facility. • Candidate's provision of personal training services meets the facility requirement and matches trainer's own resources. <p><u>Note:</u> Suggest that the assessor obtains information from facility operator or observes trainer working with clients.</p>

Element 4: Maintain records pertaining to a personal training operation.

Range: financial (budget, accounting, taxation, client transactions), time, objective measures, client assessment and training records.

Task: Written documentation e.g. admin records, screening assessment records, programmes; Oral questioning/ interviewing.

Performance Criteria		Evidence
4.1	Financial record-keeping and administration are in accordance with standard business practice for sole traders and with contractual arrangements.	Candidate provides the assessor with evidence of their financial record keeping and administration systems. (All of range variables to be assessed) i.e. <ul style="list-style-type: none">• Financial systems e.g. accounting practices• Time e.g. appointments diary• Objective measures e.g. client screening and/ or assessment procedures.• Client assessment and training records, e.g. programmes designed for clients; training diaries etc.
4.2	Recording of time involvement, objective measures of performance and client records is carried out to support performance appraisal by self and/or employer.	Candidate provides the assessor with evidence of how they manage their own appraisal/ performance system in relation to recording of time involvement, measuring performance of clients, and maintaining client records (all of range variables to be assessed) i.e. <ul style="list-style-type: none">• Financial e.g. ensuring clients are paying• Time e.g. scheduling clients; offering preferential booking times for regular clients etc.• Objective measures e.g. goal setting for clients, performance measures for clients during and/ or before sessions• Client assessment e.g. completion of screening and assessment records, along with timing of ongoing evaluations• Training records e.g. systems for documenting programmes and maintaining follow-up etc. is viewed and/ or discussed.

Element 5: Implement reliable service delivery of personal training service.

Task: Written documentation e.g. admin records, screening assessment records, programmes; Oral questioning/ interviewing.

Performance Criteria		Evidence
5.1	Management of appointment schedule and workload is in accordance with business objectives and personal capacity.	<p>Candidate provides assessor with evidence of how he/ she manages their schedule and workload and maintains their business objectives.</p> <p>Suggest that assessor:</p> <ul style="list-style-type: none"> • Views appointment diary to see if trainer is meeting weekly targets for achieving his/ her financial outcomes. • Views appointment diary to see if trainer is scheduling regular time off during day for own workouts, relaxation etc. • Asks personal training manager or similar person whether candidate is managing their workload successfully on a regular basis.
5.2	Self management supports maintenance of own health and freedom from injury (overuse, traumatic) while engaged in personal training.	<ul style="list-style-type: none"> • Candidate explains to assessor how he/ she prevents self injury and burn-out while engaged in personal training. • Assessor observes candidate working with clients to assess the candidate's ability to prevent injury while training clients e.g. the candidate's lifting techniques, hygiene techniques (such as hand washing between clients) etc. • Assessor obtains evidence from Personal Training manager or similar supervisor to ascertain how successful the candidate is (or has been) in maintaining their own health while operating as a personal trainer.
5.3	Planning and implementation of continuing education programme maintain currency of training methods and advice to clients.	<ul style="list-style-type: none"> • Candidate provides the assessor with evidence of their attendance at ongoing education initiatives e.g. • Certificates/ letters of attendance sighted • Training material sighted • Assessor seeks evidence from personal training manager or similar supervisor on candidates attendance at 'in-house' training/ meetings etc. • Assessor views training/ assessment records to ascertain the currency and validity of their exercise selection and training methods. <p>Note: Suggest that candidate has been operating for six months or longer before assessing their attendance at ongoing education programmes, i.e. they may have only recently graduated from a Personal Training course and have not yet thought about ongoing education and upskilling.</p>

Checklist unit 7062

Establish a personal training client base

Assessors name: _____

Organisation name: _____

Element 1: Investigate the market for personal training services within a facility, a geographical area, and a target population.

1.1	<p>Methods of investigation are identified and described in terms of suitability for the service and the facility.</p> <p>Range: methods include - notice, pick up questionnaire, sample questionnaire, sample interview, random sample questionnaire, random sample interview, analysis of demographic data, analysis of existing personal training activity, analysis of trends; practicality - cost, material resources, time, quality of information.</p>	
1.2	Investigation methods and procedures for examining demand within a facility are implemented to match the proposed service and facility requirements.	
1.3	Investigation methods and procedures for examining demand within a geographical area cover the area and are implemented to match the proposed service.	
1.4	Investigation methods and procedures for examining demand within a target population match the characteristics of the target population and are implemented to match the proposed service.	

Element 2: Prepare and implement a self marketing campaign.

2.1	<p>Analysis of own resources is carried out in terms of strengths and needs related to the marketing, selling, and provision of personal training services.</p>	
2.2	<p>Marketing messages relating to personal training services are identified in terms of benefits for the target market.</p> <p>Range: benefits include - health, appearance, weight management, performance, stress management, self-esteem, social, fashion and/or style.</p>	
2.3	<p>Marketing plan preparation meets planning needs of personal trainer and employer requirements if applicable.</p> <p>Range: product definition, pricing, market definition, message, channel, goals and objectives, time management, budget.</p>	
2.4	Implementation of self-marketing campaign is carried out in accordance with marketing plan.	

Element 3: Establish business relationships with fitness and/or recreation establishments.

3.1	<p>Operational and financial outcomes of providing personal training services within a fitness and/or recreation establishment are identified, and are analysed in terms of costs and benefits for parties involved.</p> <p>Range: compatibility with existing staff and services, facility use issues, client identification issues, marketing issues (in-centre, external), money management issues.</p>	
3.2	<p>Contract is negotiated and meets enterprise objectives for the personal trainer and the facility operator.</p> <p>Range: conditions of service, times available, access to existing facility clients, conditions for in-centre marketing and external marketing, financial conditions, handling of fees and payments, assignment of liabilities under consumer and health and safety legislation where applicable.</p>	

3.3	Implementation of personal training services within a fitness and/or recreation facility meets facility requirements and matches trainer resources.		
Element 4: Maintain records pertaining to a personal training operation.			
Range: financial (budget, accounting, taxation, client transactions), time, objective measures, client assessment and training records.			
4.1	Financial record-keeping and administration are in accordance with standard business practice for sole traders and with contractual arrangements.		
4.2	Recording of time involvement, objective measures of performance and client records is carried out to support performance appraisal by self and/or employer.		
Element 5: Implement reliable service delivery of personal training service.			
5.1	Management of appointment schedule and workload is in accordance with business objectives and personal capacity.		
5.2	Self management supports maintenance of own health and freedom from injury (overuse, traumatic) while engaged in personal training.		
5.3	Planning and implementation of continuing education programme maintain currency of training methods and advice to clients.		
DATE	CANDIDATES SIGNATURE	ASSESSORS SIGNATURE	C/NYC
Comments:			

Note: the assessor needs to ensure **sufficiency** of performance and knowledge. Therefore the assessor needs to know that the Candidate has performed the tasks competently many times before and will be competent in the future. Ticking/ dating the boxes more than once, having 2 checklists for different assessment occasions or observing workplace performance over a period of time can show this.