BACK TO BASICS: 3 STEPS OF THE INITIAL CONSULTATION

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INTRODUCTION

The initial consultation is the foundation for a personal trainer's success with a client. Designing an individualized fitness program is like piecing together a puzzle. Personal trainers need to consider all factors that contribute to a client's status, and how those factors affect the potential for future goals. Personal trainers generally study exercises and training that effect physiological change (i.e., bodyweight, muscle size); however, there are other factors about the client that are equally, if not more, important for the personal trainer to consider, such as motivation and self-efficacy. Without a thorough consultation prior to program design, the program can be rendered ineffective. Therefore, it is imperative to evaluate more than just basic health history when designing a client's individualized fitness program. This article provides details of the three steps that should be included in the initial consultation: establish a rapport, analyze the situation, and develop the solution.

ESTABLISH A RAPPORT

It is critical to establish a rapport with the client. From the client's perspective, hiring a personal trainer is as much a personal commitment as well as a financial one. Effort must be made to show the client that the personal trainer deserves their trust, energy, and time. These simple concepts can help establish rapport and improve the personal trainer's credibility.

1. **Act Professional**: First impressions cannot be replaced, so personal trainers should dress professionally and treat clients with friendliness and respect. Remember, clients are hiring personal trainers to help them. Some personal trainers can create an environment of intimidation just by their body language and posture. It is important for personal trainers to ensure that they are enabling a cordial environment.

2. **Ask Questions**: Personal trainers who show interest in the client's goals and ideas will help establish confidence and trust in the personal trainer. Personal trainers should be engaged with their conversation and inquire about clients' experiences, as well as likes and dislikes with exercise, fitness, and training. Seeing as much of the clients' point-of-view as possible can help personal trainers in better understanding their interests.

3. **Listen**: Personal trainers can show respect by maintaining open body language, eye contact, and non-verbal responses (e.g., head nods) to show clients that they are being heard and understood. Personal trainers should make sure to include the clients' wishes into the program design to show that they are listening and care what the client has to say.

4. **Share Experiences that are Relevant**: Personal trainers can gain credibility by emphasizing any professional expertise that carries over into the clients' needs. This can include sports participation, success with similar clients, unique certifications or expertise, or attendance at seminars or classes. Personal trainers should be careful not to misuse this step; they should keep the information relevant to the specific client and within the personal trainer's scope of practice.

5. **Check the Ego**: Personal trainers do not need to give clients their entire resume of achievements or prove that they are competent. Personal trainers can create an environment that seems hostile or intimating to a novice exerciser, even without realizing it. It is important to make sure that the environment does not tempt personal trainers to act superior in any way, as the clients may already feel a sense of inferiority due to their health status. Personal trainers should always be personal, respectful, and non-judgmental. Remember, a personal trainer's job is to help clients feel better, not the other way around.

Following these steps first in the consultation process will ensure that the data needed to succeed is valid and reliable. Failure to build trust through the rapport process can lead to data results that are not truly accurate, based on the lack of trust and understanding between the personal trainer and the client.

ANALYZE THE SITUATION

Once the personal trainer has the tools to begin collecting the necessary data, they can begin creating a plan to achieve success with their client. While most personal trainers include a health history analysis within the consultation, the following tools can also help provide valuable information for program success:

1. **Health History Form**: Health history forms ask for information on pertinent topics, such as previous surgeries, injuries, illnesses/diseases, current medications, allergies, and family history. This is the foundation of the information that a personal trainer needs moving forward. Most personal trainers and facilities require a health history form before getting started. If a personal trainer is not using one, then they are increasing their liability risk.

2. **Exercise, Sport, or Physical Activity History (Par-Q)**: A Par-Q is simple form designed to help the personal trainer understand the client's current fitness level, as well as all of their past exercise experiences. Additional information on their exercise preferences is valuable, such as likes, dislikes, and exercises that they have never performed. It is imperative to explain to the client the importance of providing as much information about their exercise history as possible, that way the personal trainer can better design a targeted plan.

3. **Past or Present Injury, Disease, or Pain**: Many clients will claim no injuries or pain on a health questionnaire, but when asked about individual joints or activities they will recall soreness, stiffness, or past trauma. Personal trainers should briefly walk through each joint, taking notes when appropriate. It is important for personal trainers to explain to the client that they are not physicians or physical therapists, but this information can help determine what steps to take next. Personal trainers can find reproducible injury forms online, or they can easily create them on their own. Remember, personal trainers are not diagnosing pain or problems, they just need to be aware of their existence. If pain, trauma, disease, or injury is outside of the personal trainer's scope of practice, then a physician's clearance is necessary. Explaining the value of a physician's clearance to the client can encourage them to assist in obtaining the information needed.

4. **Schedule Availability**: Create a form where clients identify unavailable times. Find out how much time the client can realistically commit to an exercise program. Acknowledge their outside commitments, but encourage them to commit some time to the program (not to the personal trainer, but to the program). Personal trainers can use a scheduling program, such as Outlook Calendar or smartphone apps, to share scheduled sessions and send reminders.

5. **Psychometric Measures**: Psychometric measures include questionnaires that assess the client's level and source of motivation, self-efficacy, and barriers for exercise. The data from psychometric measures is extremely valuable, although many personal trainers do not implement these measures. A better understanding of these variables can assist in developing a truly personal program for the client, one that incorporates the client's physical and mental capabilities. Examples of psychometric measures that a personal trainer could employ include: Exercise Motivations Inventory, Self-Efficacy for Exercise Scale, and Barriers Self-Efficacy Scale (1,2,3). These measures and instructions for scoring are available online in the public domain.

DEVELOP THE SOLUTION

1. **Follow Up**: After reviewing all the information from the initial consultation, the personal trainer should set up a time to confirm the analysis with the client. The personal trainer should describe the purpose of the information that was gathered from them and summarize the results to ensure the information is correct.

2. **Set Goals**: It is important to get the client to describe their ideas for goals so that the personal trainer can work with them to create a solution. The personal trainer should not create goals for the client; they should work together using all the information collected to design goals, preferably using a goal-setting strategy such as the SMART (specific, measurable, attainable, relevant, and timed) goal system. Additionally, it is important to create goals that are both short-term and long-term, and that include both intrinsic and extrinsic sources of motivation. Personal trainers can then incorporate the information from the assessments to create tangible and approachable goals. This will instill accountability and adherence from the client.

3. **Design the Program**: Now the personal trainer has all the tools to design a program that is truly catered for the individual client's abilities and goals. Based on the information gathered previously, program design can be more focused, direct, and effective.

CONCLUSION

Developing a truly successful program involves several layers that the personal trainer must address with time, competence, and critical thinking. A thorough and complete initial consultation can ensure that the personal trainer has all the data that they need to design a program that is time-efficient and successful. It is important to take the time to facilitate an initial consultation that is worth the time and energy of the personal trainer and their client.

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