



YOUR VIP ONBOARDING EXPERIENCE

Help your clients feel seen, supported, and ready to go from the second they say yes.



Build immediate trust



Set clear, confident expectations



Have clients keep coming back!





I'm Becca, Personal Trainer, Business Coach, and Fitness Enthusiast.

Over the past 10 years, I've built a sustainable business by doing things differently... focusing less on flashy marketing tricks, and more on what truly works: connection, clarity, and consistency.

In this document, I'll share simple steps to help you create a smoother client experience, set healthy boundaries, and create great client relationships from the beginning.

Because building a thriving business isn't about doing more, it's about doing the right things, for you and your clients.

By the end of this VIP Onboarding Experience, you'll have:



A smoother, simpler onboarding process that makes a strong first impression



Clients who feel seen, supported, and excited to work with you



More confidence in the way you deliver value

Step 1: Confirmation & Warm Welcome

Send a personalised thank you message or email

When to do this? As soon as possible

Hi Sarah,

I just saw that you've signed up for All Things Strength Training — I'm so excited to have you in the program! It's a perfect fit for you as I know you want to be stronger and have more energy for Noah and Tilly.

I'll send over an email shortly with all the logistics, if you have any questions feel free to ask them via WhatsApp or email.

Have a great weekend, and look forward to seeing you soon!

Include things like:

- Express your excitement about working with them.
- Reaffirm they've made a great decision.
- Reference something they shared (goal, challenge, motivation).
- Include a short welcome video or voice note if possible.
- Let them know what to expect next.



Step 2: Clear Next Steps

Share your onboarding email or client welcome pack

When to do this? Within 24 hours

Hi Sarah,

I'm really excited for you to start the All Things Strength Training program in September, there's a lovely group of ladies and you all share the same energy and passion for fitness

Before we start, here are a few key details:

📅 *Our first session is on Saturday 13th September 2025, from 10am–12pm.*

📍 *You can access the live call via this link: [Insert Zoom/meeting link].*

🔑 *There's nothing to prepare — just bring yourself, a pen, some paper, and an open mind.*

💬 *I'm adding you to the WhatsApp group now. Feel free to say hi and introduce yourself, and we'll get to know each other more on the first call.*

📁 *All key materials and session recordings will be shared via Google Drive.*

🕒 *I'll respond in the WhatsApp group within 24 hours (Monday to Friday). You can also email me at Becca.jermy2@gmail.com if you ever need anything.*

I'm looking forward to the first session, if you have any questions before we start, just drop me a message.

Include things like:

- What happens next (key dates, timeline, upcoming calls, etc.)
- How to prepare (any forms, assessments, or pre-work)
- Where to find everything (client portal, links, etc.)
- How to contact you (WhatsApp, email, office hours)
- What they can expect from you and what you expect from them



Step 3: Invite Them In

Add them to relevant platforms (WhatsApp, client portal etc)

When to do this? Within 2-3 days

Hi Everyone 🙌

How's everyone feeling about starting the program? Excited, nervous, a mix of both? All totally normal! Whatever you're feeling, I promise we're going to have a brilliant time together.

Just checking in to make sure you've received the welcome email from me and have the Zoom link ready for our first call. If you're missing anything, just let me know here and I'll resend it.

Also there are no stupid questions in this group. If something's on your mind, ask it! Chances are someone else is wondering the same thing (and will be grateful that you asked!).

Looking forward to seeing you all soon!

Include things like:

- Send a quick check-in to make sure they've received everything and know where to go.
- Let them know they can ask anything, even the ones that seem stupid!



Step 4: Personal Touches

**Send them something personal
that you think will help them with their goal**

When to do this? Week 1

Hi Sarah,

I hope you're getting settled into the group.

*I was thinking about your goal and I think you'd love *The World's Fittest Book*. It's one of the best books I've read. There's a story in there about a man who stopped counting his age — and he's not only the oldest in the tribe but also the fittest. It really stuck with me, and I think it'll resonate with you too!*

Include things like:

- A relevant resource (a podcast, book, article, etc.)
- A personal voice note referencing a goal or challenge they mentioned
- A small, thoughtful gift



Step 5: Set a Quick Win

Help them achieve something small but meaningful

When to do this? Week 1

Hi Everyone,

Here are a few wins you might aim for this week. Pick one (or add your own) and let me know. I'll support you to make it happen!

 *Possible Quick Wins for Week 1*

- ✓ *Complete your first workout*
- ✓ *Set up your training space*
- ✓ *Commit to one new habit (e.g. 10-min walk each day)*
- ✓ *Get clear on why this goal matters to you*
- ✓ *Say no to something that drains your energy*
- ✓ *Prepare 3 healthy meals or snacks in advance*
- ✓ *Reflect on what's held you back in the past*
- ✓ *Track how you feel after moving your body*
- ✓ *Share your goal in the WhatsApp group*

You could ask them:

"What would feel like a win for you in your first week together?"



Step 6: Celebrate & Reflect

Acknowledge what they've already achieved.

When to do this? End of week 1 or 2

Hi Sarah,

How did you find our first call?

I'm reaching out to everyone to see if there's anything else you'd like me to go over again in the next session or include.

I also wanted to acknowledge you for sharing so vulnerably. Your reason "why" is so powerful and I know that a few other participants saw something for themselves in what you said - so thank you!

Include things like:

- Reflect back the courage it took to commit.
- Share what you've noticed about their strengths or growth already.
- Ask how they're feeling so far and if anything needs adjusting.



Let's Stay Connected

You care deeply about your clients.
You want them to feel seen, supported,
and like they're in the right place from day one.

If this guide resonated with you and you're ready to:

- Create a standout client experience
- Build trust and retention from the start
- Feel confident that every new client is in good hands

Then let's keep the conversation going.

Connect on Instagram or Facebook

I regularly share tips on onboarding, retention, communication, and creating deeper client relationships.

Message me and let me know you downloaded the guide; I'd love to hear what stood out to you!



@beccajermy_coaching

Book a Free Discovery Call

Whether you're refining your onboarding, looking to improve client retention, or want a second pair of eyes on your systems... let's chat!

No pressure. Just clarity, insight, and honest conversation.



Book a [free discovery session](#)

Because when clients feel like VIPs, they don't just stay.
They grow. They refer. And they become part of your legacy.
Let's build that experience together.



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