



# Quick-Start Guide

Part of the PT Business Automation Audit

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# The PT Business Automation Audit – Quick-Start Guide

## Identify What You Are Still Doing Manually (And Shouldn't Be) in 10 Minutes

From FitFlow's "Automate 80% of Your Personal Training Business" Guide

### What Is in This Kit

You have 7 resources. Here is what each one does and when to use it:

#	Resource	What It Does	When to Use
00	Quick-Start Guide (this file)	Explains the audit structure, scoring, and how to use the results	Read this first
01	Scheduling Automation Audit	5 checklist items for scheduling and rescheduling tasks	Audit your scheduling workflow
02	Billing & Payments Audit	5 checklist items for invoicing, payment collection, and billing admin	Audit your billing workflow
03	Client Communication Audit	5 checklist items for check-ins, reminders, and client messaging	Audit your communication workflow
04	Onboarding & Intake Audit	4 checklist items for new client intake and onboarding tasks	Audit your onboarding workflow
05	Progress Tracking Audit	3 checklist items for progress reports, dashboards, and alerts	Audit your tracking workflow
06	Bookkeeping & Admin Audit	3 checklist items for accounting sync, expenses, and tax prep	Audit your bookkeeping workflow

### How to Use This Audit

#### The 10-Minute Self-Assessment

This checklist is a diagnostic tool. For each of the 25 items, you will answer one question: **"Am I currently doing this manually?"**

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Step 1: AUDIT (Resources 01-06)
|
+→ Work through each category in order
|
+→ For each item, check the box if you are doing it manually
|   [ ] Manual -- I do this by hand, via text, or in a spreadsheet
|   [A] Automated -- A system handles this without my intervention
|   [P] Partially Automated -- Some automation, but I still intervene regularly
|
+→ Count ONLY the items marked [ ] Manual
|
Step 2: SCORE (see Scoring Guide below)
|
+→ Add up your manual task count (0-25)
|
+→ Find your automation tier
|
+→ Read the recommended action plan for your tier
|
Step 3: PRIORITIZE (see Priority Levels in each item)
|
+→ Start with items marked "Must" priority
|
+→ Within "Must" items, start with the easiest implementation difficulty
|
+→ Schedule your first automation for this weekend
```

**Total time:** 10 minutes for the full audit. 15 minutes if you calculate time savings.

## | Scoring Guide

After completing all 6 category audits, count the number of items you marked as **Manual** (not Automated or Partially Automated).

### Your Automation Score

Manual Task Count	Automation Tier	What It Means	Recommended Action
<b>0-8 manual tasks</b>	Mostly Automated	Your business operations are well-systematized. You are in the top 20% of trainers for operational efficiency.	Fine-tune: look for "Partially Automated" items that could be fully automated. Focus on the "Nice" priority items you have been putting off. Consider scaling your client capacity – your infrastructure can likely handle more.
<b>9-15 manual tasks</b>	Automation Ready	You have some systems in place but significant manual work remains. You are likely spending 8-12 hours per week on tasks a system could handle.	Prioritize: identify the 3-5 "Must" priority items you are still doing manually. Implement them in order of easiest first. The scheduling and billing categories typically offer the fastest ROI. Target: move 5-7 items from Manual to Automated within 2 weeks.
<b>16-25 manual tasks</b>	Urgent Automation Needed	Your business is running almost entirely on manual effort. You are likely spending 15-21 hours per week on admin that could be automated. At a \$50-75/hour effective rate, that is \$3,000-6,300/month in lost earning capacity.	Weekend sprint: block one weekend and implement the top 6 "Must" priority items – scheduling automation, recurring billing, automated reminders, intake forms, check-in templates, and accounting sync. These 6 alone will save you 8-12 hours per week. Then tackle the remaining items over the following 2 weeks.

## Worked Example

**Trainer:** Marcus, 31, managing 28 in-person and online clients. Training for 4 years. Earning \$4,800/month. Working 50+ hours per week – about 15 of which are admin.

### Marcus's Audit Results

Category	Items Marked Manual	Items Marked Automated	Items Marked Partial
Scheduling (5 items)	3	1	1
Billing & Payments (5 items)	4	0	1
Client Communication (5 items)	4	0	1
Onboarding & Intake (4 items)	3	0	1
Progress Tracking (3 items)	2	0	1
Bookkeeping & Admin (3 items)	3	0	0
<b>TOTAL</b>	<b>19</b>	<b>1</b>	<b>5</b>

**Marcus's Score:** 19 manual tasks = **Urgent Automation Needed**

#### Marcus's Priority Plan:

- This Saturday morning:** Set up Calendly for self-service booking + automated reminders (Items 1-2). Time saved: 2-3 hrs/week.
- This Saturday afternoon:** Set up Stripe recurring billing for all 28 clients (Items 6-7). Time saved: 2-3 hrs/week.
- This Sunday morning:** Create a Google Form intake workflow connected to his coaching platform via Zapier (Items 16-17). Time saved: 1-2 hrs/week.
- This Sunday afternoon:** Set up templated weekly check-in messages in his coaching platform (Item 11). Time saved: 2-3 hrs/week.
- Next week:** Connect Stripe to QuickBooks for automated bookkeeping (Item 23). Time saved: 1 hr/week.

**Total estimated time saved:** 8-12 hrs/week. At Marcus's effective rate of \$55/hr, that is \$1,760-2,640/month in recovered earning capacity.

## Understanding Each Checklist Item

Every item across Resources 01-06 follows the same structure:

Field	What It Tells You
<b>Task</b>	The specific administrative task being audited
<b>Current Manual Method</b>	How most trainers do this task without automation – the behavior you are checking yourself against
<b>Automation Solution</b>	What the automated version looks like – the target state
<b>Estimated Time Saved</b>	How many minutes or hours per week you reclaim by automating this one task
<b>Recommended Tool(s)</b>	Specific tools with approximate monthly cost ranges
<b>Implementation Difficulty</b>	Easy (under 1 hour setup), Medium (1-3 hours setup), or Hard (3+ hours or requires integration work)
<b>Priority Level</b>	Must (automate first – highest ROI), Should (automate second – meaningful time savings), Nice (automate when you have capacity – incremental improvement)

## After the Audit

Once you have your score and priority list:

1. **Read the full automation playbook:** [Automate 80% of Your Personal Training Business](#) – the article this checklist was built from. It covers each of the 6 automation systems in depth with tool comparisons, before/after metrics, and an implementation sequence.
2. **Start with scheduling and billing:** These two categories consistently deliver the highest ROI per hour of setup time. Most trainers reclaim 4-6 hours per week from these two categories alone.
3. **Use the “One Weekend” framework:** Saturday morning (scheduling), Saturday afternoon (billing), Sunday morning (onboarding), Sunday afternoon (communication). Total setup: 10-15 hours. Total weekly time saved: 8-15 hours.
4. **Track your results:** After 2 weeks of automation, re-run this audit. Your score should drop by 5-8 points. If it does not, review the items you automated – some may need configuration adjustments.

## Related Resources

- [The Hidden Cost of Admin Work](#) – Quantifies what admin is costing you in dollars and lost clients
  - [Better Systems, Not More Clients](#) – The systems-first philosophy behind this approach
  - [Scale Your PT Business to 50+ Clients](#) – The scaling playbook that builds on this automation foundation
  - [FitFlow Platform](#) – Scheduling, check-ins, progress tracking, and program delivery from one platform
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*Built by the FitFlow content team. Sources: Trainerize 2026 State of Industry Report, Everfit Automation Case Studies, Zapier Fitness Automation Blog, ACSM 2026 Fitness Trends Survey. For the full citation list, see the source article.*