



Onboarding & Intake Audit

Part of the PT Business Automation Audit

Prepared by the FitFlow content team
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Client Onboarding & Intake Automation Audit

– Items 16-19

Category: Client Onboarding & Intake **Total Category Time at Stake:** 1-3 hours per week (manual) vs. 0 minutes per week (automated) **Category Priority:** MEDIUM – automate after scheduling, billing, and communication

For each item, mark your current status:

- *[] Manual – I do this by hand*
 - *[A] Automated – A system handles this*
 - *[P] Partially Automated – Some automation, but I still intervene*
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| Item 16: Intake Form & Health History Collection

Your Status: [] Manual / [A] Automated / [P] Partial

Field	Details
Task	Collecting new client information – contact details, health history, injury history, current medications, training experience, goals, availability, and preferences
Current Manual Method	You hand the client a paper form or email them a PDF. They fill it out (sometimes incompletely). You re-type the information into your spreadsheet, coaching platform, or notebook. Or you conduct a verbal intake during the first session – which uses 15-20 minutes of paid session time for data collection instead of coaching.
Automation Solution	Digital intake form (Google Forms, Typeform, or in-platform forms) sent automatically when a new client books their first session or signs up. Form responses auto-populate the client profile in your coaching platform. Health history, goals, availability, and preferences are all captured before the first session – so the first session is coaching, not paperwork.
Estimated Time Saved	15-30 min per new client (at 2-4 new clients/month: 30-120 min/month)
Recommended Tools	Google Forms (free), Typeform (\$25+/mo, more polished UX), JotForm (\$34+/mo), Trainerize (built-in intake forms), FitFlow (intake forms with auto-profile creation included)
Implementation Difficulty	Easy (1 hour – create form template with all required fields, set up auto-send trigger)
Priority Level	Must

Why this matters: Manual intake wastes the most valuable moment in the client relationship – the first session. A first session spent filling out forms instead of coaching sets a poor precedent. Digital intake moves data collection to pre-session, so the first session is 100% coaching. Rachel Henly used automated onboarding to achieve 10x client growth (Everfit 2026).

| Item 17: Welcome Email & Onboarding Sequence

Your Status: [] Manual / [A] Automated / [P] Partial

Field	Details
Task	Sending new clients a welcome message with setup instructions, app access, expectations, policies, and first-week preparation
Current Manual Method	You compose a welcome text or email for each new client. The content is 90% identical every time – download the app, here’s your schedule, here’s the cancellation policy, here’s what to expect in your first week. You send it manually, often forgetting one or two items, and the client texts back with questions you could have preempted.
Automation Solution	Automated welcome email sequence triggered by signup or first payment. Day 0: Welcome + app setup instructions + policy summary. Day 1: Program overview + first-week schedule. Day 3: First check-in (“How’s the app working? Any questions?”). Day 7: Feedback request. The sequence runs without your involvement. Every client gets the same thorough onboarding.
Estimated Time Saved	15-30 min per new client
Recommended Tools	Mailchimp (\$13+/mo, email automation), ActiveCampaign (\$29+/mo, advanced sequences), Trainerize (built-in welcome messages), FitFlow (onboarding sequence included), Zapier + any email tool (\$19.99+/mo)
Implementation Difficulty	Medium (2-3 hours – write sequence content, set timing triggers, test the flow)
Priority Level	Must

Why this matters: Inconsistent onboarding creates inconsistent client experiences. The client who gets a thorough welcome sequence with app setup, policies, and expectations starts strong. The client who gets a hasty “welcome, see you Tuesday” text starts confused. Automated sequences guarantee consistency regardless of how busy your week is.

| Item 18: Payment Setup & First Charge Processing

Your Status: [] Manual / [A] Automated / [P] Partial

Field	Details
Task	Setting up payment details for new clients and processing the first charge
Current Manual Method	You discuss pricing verbally or via text. You send a payment link or ask for cash/Venmo. You manually create the client in your payment processor, set up their subscription, and verify the first charge processed. If they choose a package, you calculate the pro-rated amount and create a custom invoice.
Automation Solution	Payment setup integrated into the intake flow. After completing the intake form, the client is directed to a payment page where they select their plan (monthly subscription, package, or per-session) and enter payment details. First charge processes automatically. Subscription is created. Receipt is sent. No manual intervention.
Estimated Time Saved	10-20 min per new client
Recommended Tools	Stripe Checkout (\$0 monthly + per-transaction fee), Square Online Checkout (free with Square), Trainerize Payments (integrated), FitFlow (intake-to-payment flow included), Zapier (connect intake form to Stripe, \$19.99+/mo)
Implementation Difficulty	Medium (1-2 hours – create payment page, link to intake flow, test end-to-end)
Priority Level	Should

Why this matters: Manual payment setup introduces friction at the most critical conversion moment. A new client who just committed to training should not have to wait for you to manually create their subscription. The automated flow captures the payment while intent is highest – no delay, no dropped balls.

| Item 19: Platform Access & App Provisioning

Your Status: [] Manual / [A] Automated / [P] Partial

Field	Details
Task	Setting up new clients on your coaching platform – creating their account, assigning their program, granting app access
Current Manual Method	After a client signs up, you log into your coaching platform, manually create their profile, assign their training program, set their schedule, and text them the app download link and login credentials. If you use multiple tools (coaching platform, scheduling, billing), you repeat this process in each one.
Automation Solution	No-code workflow (Zapier or native integrations) that triggers when a client completes intake + payment. Zapier automatically creates the client profile in your coaching platform, assigns the appropriate program template, sends app access credentials, and adds them to the correct communication groups. One form submission triggers everything. Zero manual steps.
Estimated Time Saved	10-20 min per new client
Recommended Tools	Zapier (\$19.99+/mo, connects intake form to coaching platform to payment processor), Make.com (\$9+/mo, alternative to Zapier), Trainerize (native intake-to-platform flow), FitFlow (end-to-end onboarding automation included)
Implementation Difficulty	Hard (3-4 hours first-time setup – requires connecting multiple tools via Zapier/Make, testing the workflow, handling edge cases)
Priority Level	Should

Why this matters: “A single Zapier Zap connects your intake form to your coaching platform, payment processor, and email system. When a client fills out the Google Form, they’re automatically created in Trainerize, charged via Stripe, and sent a Mailchimp welcome sequence. Zero manual steps” (Zapier Fitness Automation Blog). You do not need to be a tech person – Zapier named Trainerize a top-25 fastest-growing integration app. The fitness-specific templates are pre-built. Setup takes an afternoon, not a software engineering degree.

Category Summary: Client Onboarding & Intake

Metric	Before Automation	After Automation
Time per new client onboarding	45-90 min	0 min (fully automated)
Data collection method	Paper forms, verbal intake, or emailed PDFs	Digital form auto-populated to client profile
Welcome sequence consistency	Variable (depends on trainer's availability)	100% consistent (automated sequence)
Time from signup to first session	2-5 days (manual setup delays)	Same day (automated provisioning)
Manual steps per new client	8-12	0

Total items in this category: 4 Count your Manual items: ____ / 4

Source data: Everfit Automation Case Studies (Rachel Henly 10x growth, Boulay Fit 2x revenue, Alinea Performance 50% admin reduction), Zapier Fitness Automation Blog. Tool pricing current as of April 2026.