STANDARD OPERATING PROCEDURE

New Gym Member Onboarding SOP

Document no.	SOP-FIT-004
Revision	1.0
Owner	Gym Manager
Effective date	September 15, 2026
Review cycle	Every 12 months

1. Purpose

To make sure every new member is registered correctly, screened for health concerns, shown around the facility safely, and set up with a starter plan that improves retention.

2. Scope

Applies to the onboarding process for a new gym membership, from registration through the two-week follow-up. Daily check-in for existing members is covered by a separate SOP.

Definitions

Health questionnaire	A screening form asking about medical conditions, injuries and medications that could affect exercise safety.
Physician clearance	Written approval from a doctor allowing a member with a flagged health condition to begin exercise.
Starter program	A basic personalized workout plan given to a new member based on their goals and baseline fitness.

3. Responsibilities

Front Desk Coordinator	Completes registration, collects waivers, and issues access credentials.
Personal Trainer	Leads the fitness assessment, facility tour and equipment demonstration, and builds the starter program.
Gym Manager	Reviews flagged health questionnaires and confirms physician clearance before a session begins.

RACI matrix

Activity	Front Desk Coordinator	Personal Trainer	Gym Manager
Complete registration in the gym management software	R/A	I	I
Collect waiver and health questionnaire	R/A	I	I
Review a flagged health condition	I	R	A
Conduct the fitness assessment	-	R/A	I

Activity	Front Desk Coordinator	Personal Trainer	Gym Manager
and tour			
Schedule the two-week follow-up	C	R/A	I

R = Responsible, A = Accountable, C = Consulted, I = Informed

4. Materials and PPE

Materials, tools and systems

- Gym management software for registration
- Membership agreement and pricing sheet
- Waiver and health questionnaire forms
- Access card or fob and mobile app setup
- Fitness assessment form and body measurement tools
- Starter program template

5. Procedure

Step	Task	Owner	Done
5.1	**Welcome and register the member** Welcome the new member and complete their registration in the gym management software, including contact details and emergency contact.	Front Desk Coordinator	☐
5.2	**Collect the waiver and health questionnaire** Have the new member sign the liability waiver and complete the health questionnaire before they use any equipment. **Checkpoint:** No new member uses equipment before a signed waiver and completed health questionnaire are on file.	Front Desk Coordinator	☐
5.3	**Flag a health condition for review** If the health questionnaire flags a condition such as a heart issue, recent surgery or pregnancy, route it to the personal trainer and gym manager before scheduling the assessment. **Warning:** Do not proceed with a fitness assessment for a flagged health condition until physician clearance is confirmed or a modified plan is approved.	Front Desk Coordinator	☐
5.4	**Review membership terms** Walk the member through the agreement's pricing, billing cycle, freeze policy and cancellation terms before they sign.	Front Desk Coordinator	☐
5.5	**Issue access credentials** Issue the access card or fob, help the member set up the mobile app if offered, and confirm they can check in successfully.	Front Desk Coordinator	☐
5.6	**Schedule the fitness assessment** Book the complimentary fitness assessment and facility orientation with a personal trainer, ideally on the same visit or within a few days.	Front Desk Coordinator	☐
5.7	**Conduct the facility tour** Walk the new member through the gym floor, locker rooms, class studios and any specialty areas, pointing out safety equipment and rules.	Personal Trainer	☐
5.8	**Review facility etiquette and rules** Explain equipment sign-up rules, re-racking weights, wipe-down expectations and class booking procedures.	Personal Trainer	☐

Step	Task	Owner	Done
5.9	**Assess goals and baseline fitness** Discuss the member's fitness goals and record baseline measurements appropriate to their goals and comfort level. **Checkpoint:** Assessment proceeds only after confirming no unresolved flagged health condition requires physician clearance first.	Personal Trainer	☐
5.10	**Demonstrate safe equipment use** Demonstrate correct setup and safe use of the key machines and free weights the member's starter program will include.	Personal Trainer	☐
5.11	**Provide a starter program** Give the member a simple written starter program based on their goals and assessment, sized to their current fitness level.	Personal Trainer	☐
5.12	**Schedule the two-week follow-up** Book a follow-up call or short session at around two weeks to check progress and adjust the starter program.	Personal Trainer	☐
5.13	**Log onboarding completion** Mark the onboarding checklist complete in the gym management software once the waiver, assessment and starter program are all done.	Front Desk Coordinator	☐

6. Quality checks

- Every new member has a signed waiver and completed health questionnaire on file before their first workout.
- Flagged health conditions are reviewed before a fitness assessment proceeds.
- Every new member completes a facility tour and equipment demonstration.
- Two-week follow-up is scheduled before the member leaves their onboarding session.

7. Records

- Signed waiver and health questionnaire
- Fitness assessment results
- Starter program on file
- Two-week follow-up notes

8. KPIs

- Percentage of new members completing a fitness assessment within a week
- Two-week follow-up completion rate
- New member retention rate at 90 days
- Number of flagged health conditions requiring physician clearance

9. Common mistakes

- Letting a new member start using equipment before the waiver is signed.
- Skipping physician clearance follow-up on a flagged health condition.
- Giving a generic starter program instead of one based on the assessment.
- Not scheduling the two-week follow-up before the member leaves.

10. Revision history

Revision	Date	Description	Reviewed by

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1.0	September 15, 2026	Initial release	Alexa Uskova

Approval

Prepared by	Approved by	Date

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