**Task 6**

Relating to Assessment 3

For this task you must complete a business case study and complete the following paperwork

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| Learner’s name |  | Date | 12.01.2020 |

**Business and Marketing Plan**

**Self analysis**

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| Define your ‘why’ in less than 100 words |
| Becoming fitter and stronger enabled me to recover from a severe depressive episode and PTSD which ended my previous career in 2018.  Attending trainer led sessions at my local gym gave me focus and enabled me to regain my confidence and courage. I realised how fundamental physical exercise was for my mental health recovery. Learning how to move and control my body in a fitness context, meant I was able to focus on and achieve small goals every week, leading to a much healthier mind. I wish to pass on the knowledge and experience I have gained through this process to help others through exercise. |

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| Write down what success looks like for you |
| Success for me would be to see clients gain confidence, self esteem and body confidence through exercise. I would like to ensure I take a holistic approach to training and exercise and see this reflected in clients life changes that are long lasting.  In the longer term success would be me helping clients to adapt their lifestyle in order to use exercise to maintain good mental health on going. I would like to see clients develop confidence and place value on themselves in order to lead a balanced healthy lifestyle.  I am particularly interested in helping those who have suffered with mental health issues and are looking to take positive steps in their recovery and management of their condition.  I would also like to be able to reach groups of people who may not be in a position to access a gym, or have the confidence to do so.  Success would also include being able to progress my CPD to be able to specialise and focus on this area of wellbeing and fitness. |
| Create a mission statement that identifies what you want to achieve in less than 100 words |
| As a Personal Trainer I will aim to educate and enable clients to add movement and exercise into their daily lives and change the perception that exercise is a punishment , or a debt to pay for other lifestyle choices.  I want to help people find the enjoyment, sense of accomplishment and confidence for themselves through fitness.  “Movement is one of the only things you can do to help the brain remember how to experience reward and hope”  Dr. Kelly Mc Gonigal - Author of “ The Joy of Movement” |
| Write down the values that you will adhere to in your business process |
| My values are to introduce and deliver exercise in an approachable and empathetic way.  I will include outdoor sessions as well as indoor gym based sessions as I believe strongly in the benefits of exercising outdoors.  I will aim to find a form of training which the client learns to love, and develop their program accordingly.  As I trainer I will focus on maintaining empathy, consistency, relatability, and flexibility for the client. |

**Market research**

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| Industry analysis | | | | |
| Company name | Location | Services | What they are doing well and why they may be successful | Pricing |
| Milly Jane PT  CB training - female PT | Oswestry/ Newtown  Oswestry area | Gym and boot camp programmes.  Cross fit trainer  Metafit sessions outdoors. | Friendly, approachable,  Appears to get good results for her clients.  Large Focus on Cross Fit  Online presence is interesting and varied. Mainly female clients, but does mixed outdoor sessions in Newtown.  Easy to be with, I used to attend 2 x week as part of a small group.  People like the session as they are short and high energy - usually 30 mins.  For me the session became repetitive and wanted to try new things. | £35 upwards per hour for PT  Group sessions  £3.00 per session.  £5 per person for groups of 3 - 5 at your home/ place of choice.  £3 per session for 30 mins Metafit sessions of more people |

**SWOT analysis**

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| Compare your own assets and business ideas to those of other companies | |
| **Strengths**  Female  Personal experience of recovery through exercise.  Flexible in my approach to training styles  Offering a holistic approach to training  Empathetic  Access to the gym where I can use the rooms privately for clients who are self conscious or anxious about coming into the gym.  I would be happy to travel to clients homes or outdoor locations.  I would like to offer varied workouts showing progression.  I wish to offer packages for clients which include outdoor group hikes, runs, outdoor swims. | **Weaknesses**  New to fitness industry  Lack of long term experience  Confidence/ imposter syndrome  Lack of equipment for mobile services and classes |
| **Opportunities**  I have access to current (all female) clients at the gym I work for.  The gym I work for is closed during the early afternoon - so there is potential to use the space for 1 - 1 with no one else in the building which could be appealing to new clients.  There appear to be very few female PT’s working in my area, which is an advantage if people would feel more comfortable to female trainers. | **Threats**  Disinterest - Many are already content with the programs and classes they currently use and may not require 1 -1 personal training.  The time these hours are available are during the least attractive hours to train in, according to my market research survey so would only appeal to a very small number of people. |
| Create an action plan for each weakness | |
| **Lack of experience** - This can only be improved by working with clients and will come in time.  **New to the fitness industry** - I have a lot to learn, so CPD, reading, and learning more is key to understanding. Due to the time I came to fitness in my life, I am lucky to feel fully engaged and keen to continue learning and developing my own practice as reference.  **Confidence/ Imposter syndrome -** Again, CPD, learning and practice come into this. Developing skills and developing relationships with clients will help. I would also like to find a mentor who I can look to who has the same ethos regarding movement and exercise.  **Lack of equipment -** Start with bodyweight movements and exercises and start to add to equipment as finances allow. I will need to raise capital in order to run classes which require specific equipment for multiple people. | |

**Feedback questionnaire**

Develop a questionnaire or other form of feedback that will help you to understand your potential target markets better. You must provide evidence of your questionnaire – either screenshots of online surveys or a hard copy of it to submit alongside this LAR.

**Defining your markets**

List your defined markets

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| Market demographic (Who, location, size, accessibility, responsiveness) | Why |
| **\*These responses are based on feedback from the questionnaire submitted with this LAR to which 14 people responded. The group was made up of men and women, aged 35 - 65\***  Target market - Those new to exercise and wanting to make a lifestyle shift by becoming more active, but are short on time due to work or childcare issues.  Local, classes of 5 or more, mixed ability.  Evening classes between 6 - 8pm.  45 Mins - 6o mins  Women only class available/  Mixed classes  This group are accessible via targeted advertising, social media. | I would like to be able to introduce this demographic to exercise in a fun, accessible way.  I believe movement of the body is fundamental to our long term health, both physical and psychological, so designing a class which is available in the evenings and with a fun, sociable element would make it more attractive for people to attend. |
| Target Market - Those who are already part of a gym, or class and would like to develop their fitness practices.  Services offered :  \*1 - 1 Personal training  \*Couples/ small group training.  \*in a gym environment with access to equipment.  \*At the clients home using my own or clients equipment available.  \*At a time suited to them. Reached through fliers, posters at the gym/classes. | This would be about progression, and development, which would be challenging and interesting to explore training styles with the client, based on their specific requirements. |
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| Target Market - Those who are recovering from mental health challenges, and are wishing to develop a coping strategy through movement and exercise as part of their wellbeing maintenance.  \*1 - 1 Personal training in an environment in which the client is happy and comfortable.  \*Reached through fliers/ posters, social media, word of mouth. | Through personal experience I have discovered how fundamental exercise is to maintaining a healthy mind, and how vulnerable you can feel as someone starting to get back into life after a period of illness. |
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**Business aims, objectives and provisions**

Using your ‘Why’ and industry/SWOT analysis, develop your long-term (5 year) business aims, objectives and provisions (services) for your defined market. This is not a financial forecast. This is about identifying what may work for you, sit with your ‘why’ and your values. (Use the SMART acronym).

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| Aim, objective or provision | SMART |
| Personal Training 1 - 1 | Personal training 4 - 5 hours 1- 1 per week in the first year, progressing to 8 - 10 hours per week in 5 years time.  These Tailored training based on specific requirements, including goal setting, nutritional guidance and lifestyle habit change.  This would be about long term commitment between me and my client, ensuring the goals and progression are realistic and achievable.  I would hope that over the five year period these relationships over time will enable the clients own expectations of their own capability.  I would like the majority of this time to be spent with those who are requiring a distinct lifestyle change for health reasons - mental or physical. I will also need to set aside time per week for planning and program development for each client.  I will do this by using consistent scheduling and recording of training times and types.  I will organise and prioritise preparation for each client accordingly. |
| Come rain or shine  Woodland work out group | A weekly outdoor exercise and movement session, with time for a coffee afterwards in the fresh air.  I am a firm believer that exercising outdoors feels great and is often where people feel most comfortable and energised.  I would organise a weekly group to meet, complete a pre -planned program of body weight exercise using the environment around us with adaptations for different skill levels.  I would target this group at people who are too anxious to join a gym, or just dont want to, but are keen to get out and confidently enjoy exercise in a group.  There is accountability for people in joining a group , and by adding the social relaxed time at the end to connect and talk will complete the experience and boost solidarity.  I will use fliers, and social media to advertise this group, aiming to do 1 x 60 - 90 min session per week , using different locations to maintain interest and keep it varied.  I would be able to accomodate numbers of 5 and upwards as space will not be an issue.  I will set aside time each week to ensure a developed progressive program for attendees.  I will also ensure I explore the outdoor areas and test the work out before hand, so will ensure time i |
| Gym, hike and dip packages | This is a long term goal which I would like to develop, and would be happy to obtain 2 x clients in the first year for this.  The package would consist of 3 sessions per week comprising of  both gym and outdoor workouts, with one big day trip at the end of each month.  Clients would sign up for a longer term package of 6- 12 months per person, the idea to fully focus on lifestyle adaption for health.  The package would include nutritional guidance, mixed workouts, ending in a goal orientated day trip at the end of the month - for example, a hike in Snowdonia/ shropshire and an introduction to wild swimming and dipping (which is incredibly beneficial for the body and mind, and a personal passion!)  This aligns most importantly with my “ why” as it is exactly the combination of factors I used to recover from my illness, and know it works.  The increased activity though multiple environments increases confidence, and my hope would be that I could involve multiple clients on the same day trip and go as a team.  This will need good organisation and scheduling in advance to ensure clients commit to the dates set. |
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**Description of your services**

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| Service offered | Brief description of service | Pricing strategy |
| Personal training 1 - 1 | Personal training tailored to the clients requirements, this will include nutritional guidance and motivational support via online between sessions.  This can be in a gym setting, outdoors or at the clients home.  I am particularly interested in working with people living in recovery from episodes of depression and anxiety | £35 per session  Block bookings, and paid in advance/ monthly payments. |
| Small group training  2 -4 people max | Small groups - no more than 4 who wish  to exercise together for a common goal, or specific event.  Nutritional guidance and motivational support via online between sessions.  Gym, outdoors or at the clients home . | £30 pp for 2  £25 pp for 3  £20 pp for 4 |
| Outdoor training and movement.  Groups of 5 +  60 - 90 mins including stretch and relaxation work with time to sit and socialise at the end. | Walks, hikes, bodyweight work, woodland runs.  Initially this will be outdoor bodyweight training in a natural environment to maximise the impact of both exercise and nature on health.  I would also include a social element to the group that we sit and have time to chat after the exercise, have a coffee together. The social element of group exercise is important to form bonds and camaraderie. | £4 per session |
| Online Personal training and programming  60 mins | One to one online training through live meetups online, via Zoom or Facetime. This will be of particular relevance following Covid - 19 Lockdown measures.   * Provision of recorded mini workouts * Online/message support and motivation between sessions | £25 per session or    £65 for 3 per week |
| Move.Make. Communicate  Movement workshops aimed at schools and groups who may not be able access gyms and exercise | Collaboration with AN Other  (personal trainer)  Details to be confirmed & Updates post Covid -19 | Cost to be researched as would rely on funding. |
| Movement for strength and empowerment package  2 x gym sessions and 1 x outdoor guided hike/swim per week | This package would consist of 2 x gym sessions plus one outdoor session focussing on empowerment through guided walks, hikes and cold water swimming.  It is well documented that swimming and exercising outdoors is extremely beneficial for body and mind, and including this as an element of an exercise package would allow clients to explore experiences they may not have the confidence to do otherwise. | £70 per week.  Includes 2 x fitness sessions and 1 x outdoor hike/ swim  Includes support and motivation via messaging between sessions. |
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|  | Name (must be available) | Reason for name choice |
| Company |  | I am using my own name for all handles/ domains, rather than a branded title currently. |
| Facebook |  |  |
| Twitter | @ | - |
| Instagram | @ | -  I hope to be working on other projects and collaborations , so I feel using my own name is best for this. |

F**inancial forecast**

**These figures are based on realistic hours I will be able to work around a young family and my lifestyle.**

Opportunity: 1 - 1 PT

Year 1 £ 3360

Year 2 £3800

Year 3 £4000

Year 5 4000

Your business is the sum of its parts:

Year 1 £

Year 2 £

Year 3 £

Year 5 £

Opportunity: Small Group training

Year 1 £3600

Year 2 £4000

Year 3 £4300

Year 5 £4600

Opportunity:

Year 1 £

Year 2 £

Year 3 £

Year 5 £

Opportunity: Online PT

Year 1 £3120

Year 2 £3120

Year 3 £3500

Year 5 £3500

Opportunity:

Year 1 £

Year 2 £

Year 3 £

Year 5 £

Opportunity:

Year 1 £

Year 2 £

Year 3 £

Year 5 £

Opportunity:

Year 1 £

Year 2 £

Year 3 £

Year 5 £

Opportunity:

Year 1 £

Year 2 £

Year 3 £

Year 5 £

Opportunity: Outdoor workout

Year 1 £ 1536

Year 2 £ 1800

Year 3 £2000

Year 5 £2100

**Year 1 £ 11.616**

**Year2 £ 12,720**

**Year 3 £13,800**

**Year 5 £14,500**

**Business start-up action plan** (copy for each opportunity listed on the previous page)

Opportunity 1

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| Personal Training 1 - 1 | Process goal (SMART) | Daily objectives/tasks (SMART) |
| Venue hire | \*\*\*\*gym - private use of gym £10 per session  Use of the gym when classes are in progress £5 per session paid to the gym. | Ensure sessions are booked and paid in advance |
| Insurance | £129.00 per year for PLI insurance. Ensure this is in place asap. | Pay monthly for healthy cash flow |
| Equipment | Gradually increase equipment as time goes on.  May involve financing for larger quantities.  For example - Kettlebells rrp  £45 approx each x 8 = £360.00 | Research different ways of financing equipment costs. |
| Pre-launch marketing | Social media  Online press release | Identify suitable platforms and social media marketing techniques, such as hashtags, sponsored posts etc. |
| Mid-term marketing | Collect feedback, Success stories, testimonials and create inspiring blogs and posts based on real people and their experience. | Identify suitable platforms and social media marketing techniques, such as hashtags, sponsored posts for continued marketing  Adapt according to feedback and uptake |
| Your skills | CPD courses  Time to train and develop my own practice. | I will continue to read and educate myself about the benefits of exercise for good mental health. I will pursue the relevant training courses and read ongoing research articles and books.  I will set aside time per week to spend on continued learning. |
| Your education | Continued learning:  - Exercise referral qualification with Trainer Maker- 2020  -Trauma informed Personal Training - online course  - Delivering exercise for Mental Health conditions -  Training Provider TBC  2020/21  Level 4 | I will start working towards the exercise referral course, once Level 3 PT is submitted.  This is a new online course available late 2020 though Womens Strength Coalition  Once I have completed that, and 100 hours practice as a level 3 PT I will be able to apply for the Level 4 mental health qualification run by YMCA |
| Your confidence | Continuing learning will help with this, as well as maintaining good communication with clients and take on board, and continue developing my skills using feedback provided. | I will ensure a balance of my own exercise technique and learning practice is gained every week, and will try new workouts and exercises to gain confidence in that movement pattern, in order to deliver it fully to clients.  Continued learning, by setting aside time to do so, will also enable my confidence to grow |

**Promotional material**

**Leaflet or digital advert**

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| Opportunity | **Outdoor movement and training** |
| Target market | **Those new to exercise, wanting to to incorporate movement and exercise into their lifestyle with a social element.** |
| Strapline | **Woodland work out - come rain or shine** |
| Marketing copy | **Exercise should be about finding a form of movement that you love, and if it can be outdoors then even better.**  **Come and join a woodland workout using body weight movements in the fresh air followed by a coffee and a chat. All fitness levels welcome. £4 per session. Bring a flask!** |
| Description of image | **Photo of a person exercising outdoors.** |

You must submit either a digital or hard copy of the finished product to submit alongside your LAR

**Press/media release**

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| Opportunity | **Exercise for mental health 1- 1 or small group training** |
| Headline | **Exercise for your brain, and your body will follow** |
| Opening paragraph | **How often do we focus our exercise goals on our bodies? What would happen if you purely went on how your mood and emotions are after exercise?** |
| Body | **The driver for many people who embark on an exercise program is to obtain a physical goal - more muscles, less fat, smaller waist or even the allusive six pack. As great as these goals are, what would happen if you followed an exercise program which sharpened its focus on the mental and emotional gains to be had from movement, rather than chasing physical ‘perfection’. Emotions can manifest physically - stress for example can create tension and chronic pain, depression will make you slouch your body and dose you up with lethargy, and anxiety will tie you in knots. If you were able to find a way to channel these emotions out of your body through movement you would soon start to see differences in your emotional health. The best bit is you would feel the effects as soon as you have completed your first session. Satisfaction! Endorphins will be released and your brain will feel the benefits straight away. Your blood will be pumping, heart rate raised and your body in return will thank you for it….do this 2 - 3 times a week long term and then you will see how your body has repaid you. You will lose weight, your muscles will develop, and all as a happy side effect of looking out for your brain first.** |
| Closing paragraph | **Rather than chasing physical goals, chase emotional health and balance. Chase the feeling of empowerment, and satisfaction when you leave the gym feeling lighter. Learn about what your mind needs to process stress, and aim for strength to deal with whatever life chucks at you. Set your emotional goal and work towards it, and before you know it , the body will have followed.** |
| Targeted media outlets (list minimum of 6) | **Shropshire Life Magazine**  **Chester County Life Magazine**  **Shrewsbury Lifestyle Magazine**  **Mind Magazine ( Mind mental health charity)**  **Happiful Magazine**  **bmhmag.com ( better mental health magazine online)** |

**Vlog/blog article**

Write or film a vlog/blog article that appeals to and engages with at least one of your target markets. You must submit this article.