

Trial-to-Member Checklist

The first class should feel welcoming, safe, and easy to follow. Use this checklist to give every trial student the same thoughtful start, then follow up while the visit is still fresh.

Before the trial

- ☐ Confirm the booking, date, start time, location, and how to find the academy.
- ☐ Ask whether the student has questions or needs an accommodation; do not request unnecessary health details.
- ☐ Explain what to wear, what to bring, and when to arrive.
- ☐ Tell the student who will greet them and share the coach's name.
- ☐ Check the roster and tell the coach that a first-time student is coming.

During class

- ☐ Greet the student by name and introduce them to the coach.
- ☐ Pair them with a patient, suitable training partner.
- ☐ Explain the class structure, basic etiquette, and how to ask for a break.
- ☐ Cover the safety rules before live drilling; offer a lower-intensity option.
- ☐ Check in once during class without putting the student on the spot.

Right after class

- ☐ Thank the student and ask what felt clear, difficult, or surprising.
- ☐ Give them a two-minute conversation with the coach, away from the rush.
- ☐ Offer one clear next step: another class, a schedule link, or a membership overview.
- ☐ Ask permission before sending follow-up messages and confirm the best channel.
- ☐ Note any question or objection in your normal student notes; don't pressure them to decide.

Three-touch follow-up

Touch 1 — the same day or within 24 hours

WhatsApp

Hi {first_name}, thanks for training with us at {academy} today. How did your first class feel? If you have a question or want help choosing another class, reply here. — {coach_name}

Email

Subject: Thanks for visiting {academy}

Hi {first_name},

Thanks for joining us for class today. I hope you felt welcome and had a chance to see how we train. If you'd like to come back, here's the schedule: {schedule_link}. Feel free to reply with any questions.

Best,
{coach_name}

Touch 2 — day 2 or 3

WhatsApp

Hey {first_name}, did any questions come up after your class at {academy}? If it helps, I can suggest a session that fits your week. — {coach_name}

Email

Subject: Any questions after your first class?

Hi {first_name},

I wanted to see whether anything came up after your trial class. If you'd like another visit, {class_name} on {day} is a good place to continue. No rush — just reply if you'd like help with the next step.

Best,
{coach_name}

Touch 3 — day 7

WhatsApp

Hi {first_name}, checking in once more after your visit last week. Would you like to try another class, or would you prefer I leave it here? Either answer is completely fine. — {coach_name}

Email

Subject: Would you like to train with us again?

Hi {first_name},

It's been a week since your visit, so I wanted to check whether you'd like to come back for another class. If now isn't the right time, that's completely okay. You can reply whenever you'd like to reconnect.

Best,
{coach_name}

Keep a simple funnel tally

Use one reporting period and count each trial booking once at each stage:

Stage	Count	How to count it
Booked	{booked}	Trial classes booked in the period
Attended	{attended}	Booked students who completed the class
Joined	{joined}	Trial students who became members

- **Attendance rate** = $\text{attended} \div \text{booked}$.
- **Trial conversion** = $\text{joined} \div \text{booked}$.
- The Academy Health Score uses a 50% trial-conversion rate as the full-score benchmark for that component. It is a reference point, not a promise or a universal target.

How GymClass does it

The manual method is to confirm the visit, welcome the student, and keep the three follow-ups visible. GymClass offers a public trial-booking page, confirmation email and code-based booking self-management, a bookings inbox, a “Follow up on unconverted trials” action after 48 hours, and a “Trial funnel” in Retention analytics. Explore the [live GymClass demo](https://demo.gymclass.cc) to see trial booking and follow-up together.

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