

# CrossFit®

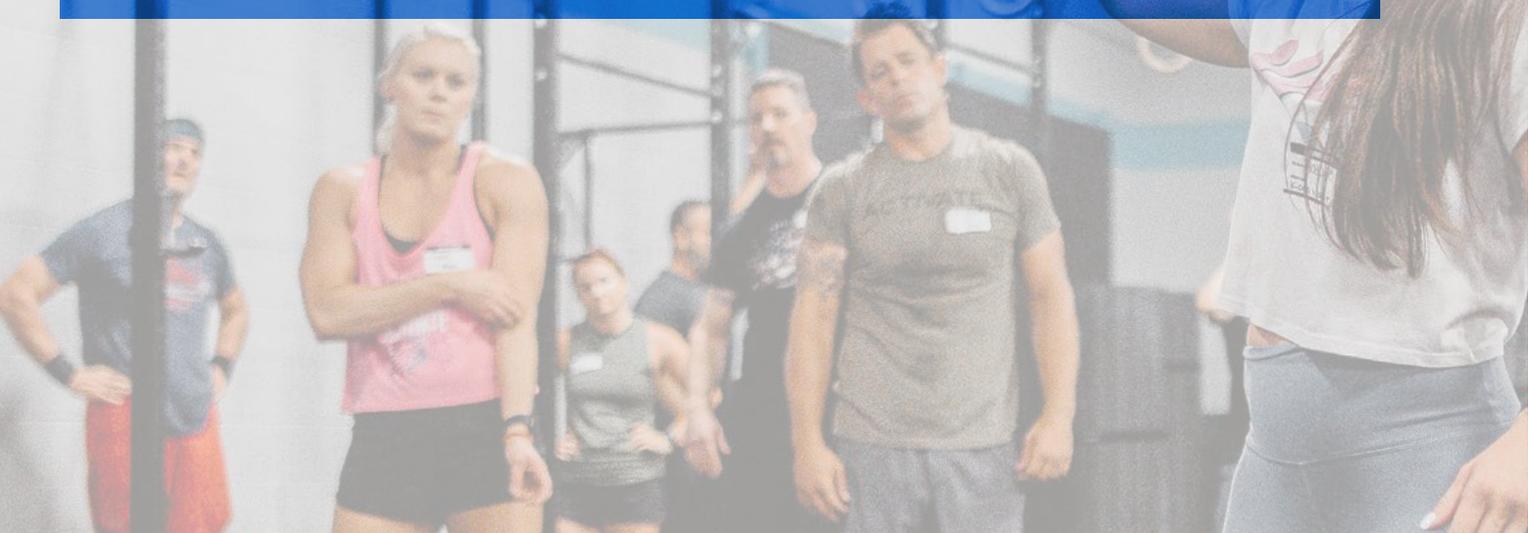
AFFILIATE PLAYBOOK

**CrossFit**  
AFFILIATES

// 2021

REV. 3.0 / 7.20.21

# FOR AFFILIATES, BY AFFILIATES



# **WELCOME TO THE CROSSFIT AFFILIATE PLAYBOOK 1.0!**

If you are new, it's great to have you on board and officially part of our affiliate community. If you are one of our amazing existing affiliates, we appreciate your continued support and efforts to spread inclusive fitness across the globe.

Over the course of the Affiliate Playbook, we will dive behind the scenes on the business side of CrossFit, sharing different methods and best practices to support staff training and development, strengthen day-to-day operations, enhance marketing and branding, and structure financing. This is a resource to help you succeed, and it will provide you with the tools you need to learn about everything, from new member conversion and retention to coaching.

We are here to support you regardless of where you are in your affiliate journey, and we want to see you succeed. Use this Playbook and our leadership team as resources to answer any and all questions you may have about what to do as you build operations that serve your community and grow your business. And please let us know how we can better support you!

This playbook is intended to be a resource for not only our newest affiliates but also our longest-standing affiliates and all those in between. With guidance, inspiration, and input from numerous affiliate owners all over the world, together with CrossFit's newly assembled Diversity, Equity, and Inclusion (DEI) Council and notable experts in a variety of industries, we have compiled the first comprehensive tool to help guide CrossFit affiliates through every step of their business journey.

Throughout the Playbook, there's space for you to record your thoughts and track your progress. Jot down questions, ideas, and plans you may want to implement wherever you are in your journey.

Now let's dive!

Here's to your health, happiness, and performance,

**THE AFFILIATE TEAM**



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# SELF-REFLECTION EXERCISE

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## About You - Are You Ready for Business?

Why do I want to start an affiliate? What are the three primary factors influencing this decision?

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What kind of affiliate do I want to start? General membership, private instruction, competitive? Not for profit? Youth/Community center? There could be more than one answer.

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What is my experience or area of expertise in CrossFit, fitness, or the fitness industry?

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What are my key personal strengths and competitive advantages? What am I better at than anyone else?

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What can I see myself actually enjoying doing every day, and can I form a business around it?

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Am I ready to devote the necessary time, resources, and capital to be successful in this business?

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Am I in a good place physically, mentally, and emotionally to dedicate the time and energy needed to start a new business?

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Do I have personal and financial support from family and friends to accomplish my goals?

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How will I balance family and business?

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Do I possess the necessary skills and abilities to start and control the day-to-day operations of an affiliate?

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Have I coached a variety of people and class sizes so I can be adequately prepared for the core offering of this business?

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What sacrifices and risks am I willing to take to be successful?

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What are my financial goals, both personally and for the business?

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Why do I believe I can be successful as an affiliate owner?

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Why do I believe this type of business is sustainable?

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# SELF-REFLECTION EXERCISE

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## About You - Getting Personal

What was your first CrossFit workout?

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What was your first win in CrossFit? (e.g., the first time you got double-unders or finally got that ring muscle-up)

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Describe your first or favorite coach. What made them special?

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What are the most important things in your life? Who are the most important people in your life?

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What drives you to get up in the morning?

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What is your favorite part about coaching or CrossFit in general?

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What excites you about owning your own affiliate? What scares you?

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What does success look like to you?

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**Success cannot be measured in wealth, fame, or power, but by whether you have made a positive difference for others.**

- Richard Branson



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# CORE VALUES, MISSION STATEMENT, & VISION STATEMENT

# BUILDING YOUR CORE VALUES, MISSION STATEMENT, & VISION STATEMENT

## Core Values

- Core values are the principles that support an organization's vision, culture, and overall philosophy. Values bring character to the group and help leaders and management guide teams through ethical and performance concerns. These are the standards organizations can cling to in times of transition.
- For internal stakeholders, such as gym owners and their staff, mission statements and core values can define performance standards, drive strategy, and provide broad ideas to hold on to during times of transition. They also establish a structure for ethical behavior and provide focus and shared goals. Regarding external stakeholders — for instance, potential members, business relationships, etc. — they can serve as a public relations (PR) tool, create bonds with customers, and provide a basis for streamlining communication among customers, suppliers, and partners.

Your core values will be closely tied to your mission statement's purpose. Therefore, the mission statement and core values should align in sentiment, speak the same language, and feed off each other. It's vital your entire team buys into and supports the company's mission statement and core values, so we recommend involving them in the process wherever possible. Team involvement is also the first step in empowering your team members and making them feel valued.

*Here are some simple steps to guide the process*

### **Determine who needs to be in the conversation.**

Since the mission statement and core values impact the whole organization and everyone who engages with it, think about who should be involved in developing the mission statement. This may include managers, coaches, front desk staff, business partners, investors, etc.

### **Brainstorm.**

Create an environment where no idea is a bad one and no answer is a wrong one. Encourage everyone involved to discuss elements they deem important when they think about the function of the business. Leaders need to get key stakeholders' input as to how others may perceive the company. Identify keywords and principles that could be used to capture the company's purpose.

### **Decide what sets you apart.**

There are a lot of gyms out there that seemingly do the same thing. One of the ways a CrossFit affiliate can set itself apart from others is by creating a distinguishing mission statement and set of core values. You must also decide what you want to be known for.

How do you want to be defined?

### **Rank each element and ensure accuracy.**

Rank the key words used for the mission statement and core values by their level of importance to what your affiliate does. You need to guide the discussion through each term and discuss how essential each one is to capturing what you value and do.

## Create a mission statement and list of core values that complement each other.

The mission statement and core values should look like they come from the same train of thought. If the core values are built around transparency and trust, then the mission statement should expound on these ideas and discuss why they are essential to what your affiliate does.

## Example of Core Values

Here is a sample from a CrossFit affiliate:

### INTEGRITY

The dedication to be honest, ethical, and fair in everything we do. In other words, the willingness to do what is right even when no one is looking. We lead by example and concentrate on doing the right thing every time.

### ACCOUNTABILITY

We are responsible for all our own actions (i.e., behavior on the floor, the flow of class, the appearance of the gym, the safety of our members, etc.). We take responsibility for our actions and decisions as well as for creating results.

### VIRTUOSITY

Technical skill or fluency in performing everything we do with proficiency, from the movements in a workout to actions in our daily lives, and constantly striving to do everything with the utmost quality. The ability to “perform the common uncommonly well.”

### GROWTH

We work together as a team committed to excellence, innovation, and expansion. We demand high performance expectations of one another and a mindset of excellence. We are constantly striving for improvement from our members, ourselves as individuals, and our knowledge and abilities.

### MEMBER FOCUS

Members are the life source of our affiliate, the heartbeat of what we do. Without them we do not exist. We are dedicated to putting our members at the very center of everything we do and are committed to improving their quality of life, health, and well-being.

### COMMUNITY

We are a diverse group of people who are committed to the cultivation of positive professional relationships with our staff and members. We strive to be a positive asset to our local, national, and global communities through the avenues of health, fitness, and charity. We look to create an open, all-inclusive safe space for people of all races, creeds, colors, and/or identities to find common ground built on health and wellness.

### EMPOWERMENT

The way we deliver our member experience is built to empower individuals to challenge themselves in ways they never would have imagined in the realms of physical, emotional and social fitness, and mental fortitude.

Below are some additional things to consider as you create your mission statement and identify your core values.

### **Thought-provoking questions to ask yourself about your gym's value and purpose:**

- What is the purpose of my organization?
- Who do I want to serve?
- What do I want people to think about when they think of my gym?
- What added value beyond training services do I want to provide?
- What unique problems do I wish to solve?
- How am I different from other gyms?
- How do I envision my role in my local community?
- What underlying philosophies, values, or motives are important to me?

To ensure your gym's mission statement and core values have the greatest amount of impact in your operating model and service delivery, try following these recommendations from fellow affiliate owners. They have found the following approaches effective for developing staff buy-in and team cohesion around the company's mission and objectives.

#### ***- Make both the mission statement and core values integral to the culture.***

While the mission and core values should influence operations and procedures, they should also permeate your affiliate's culture. Whether it is a company outing or volunteer event, senior leadership should exemplify these components and encourage employees to do the same.

#### ***- Drive home the mission and core values through team building.***

The mission statement and core values are driving tenets of the organization's activities and service within the community. For instance, if the mission involves environmental sustainability, then leaders should work with a nonprofit organization to have employees volunteer for this cause. If a core value relates to youth organizations and community centers, then creating opportunities for coaches and local initiative directors to communicate and collaborate is important to have integrity in your words. No person is an island, and if the mission and values are connected to team building, then these ideas will be easier to integrate into the work environment.

#### ***- Make both a part of the onboarding process.***

The first ideas new hires should interact with are the mission statement and core values. These should be on full display so new employees understand how important they are, and so new team members can begin to understand the internal culture of the organization.

# Mission Statement

A mission statement refers to the company's objectives and purpose and often states a way for the organization to meet them.

Mission statements are specific and discuss what an organization is attempting to achieve and how it is going to do it. These statements aim to represent what an organization is all about — in other words, its purpose. Mission statements help answer the question of why the company exists in the first place.

Useful mission statements connect the “why” with the “how” in one to two sentences. Companies should use mission statements as a means to create an identity for the company.

## Example Mission Statement: REI

At Recreational Equipment, Inc. (REI) we believe a life outdoors is a life well-lived!

What, Who, Why

We believe that it's in the wild, untamed and natural places that we find our best selves, so our purpose is to awaken a lifelong love of the outdoors, for all.

Action

Results

Who

# Vision Statement

A vision is a vivid mental image of what you want your business to become based on your goals and aspirations. Having a vision will give your affiliate a clear focus.

A great way to formulate and communicate the vision you have for your business is to write a vision statement. A vision statement captures the essence of where you want to take your business and can inspire you and your staff to reach your goals.

In your vision statement, create a clear outline and communicate your affiliate's goals and how you are viewed by your members and the world around you. Your vision statement will answer two very important questions.

1. Where are we going as a business?
2. How will we get there?



# CULTURE, COMMUNITY, AND THE MEMBER EXPERIENCE

The single-most important area where an owner has a direct impact is in constructing a healthy, inclusive culture within their business.

Where does one begin? The first step is understanding what culture is and how to approach it.

# What Is Culture?

To illustrate the processes involved in defining and building culture, let us compare culture formation to programming CrossFit workouts.

CrossFit training incorporates a protocol for testing to ensure we're delivering a broad, general, and inclusive fitness using four foundational models: *"Our first model evaluates our efforts against a full range of general physical adaptations; in the second the focus is on breadth and depth of performance; with the third the measure is time, power, and consequently energy systems; and the fourth is on health markers. It should be fairly clear that the fitness CrossFit advocates and develops is deliberately broad, general, and inclusive."* — CrossFit Level 1 Training Guide

Through these agreed-upon principles, we build a practice that allows for individual expression in programming while remaining in keeping with a core set of programming values — those that support a broad, general, and inclusive fitness. These baselines ensure inclusive outcomes and the broadest fitness possible. CrossFit's variance across these concepts drives its uniquely effective nature.

Programming is not accidental. It's driven by purpose and thoughtfulness. The same goes for culture. Culture is created and driven by how we deliver it and the spaces where we gather to instill it. The two are inextricably linked. When done well, programming and culture make CrossFit the very special platform we all know it can be. When you start, culture is the product of everything you do and don't do as an owner. It is a living, breathing force that is the collective outcome of your team's speech and actions. Over time, the culture you adopt will create habits, and those habits will define your community.

The culture of your gym will largely mirror your own values more than anyone else's. Being mindful of that requires reflection before opening and operating your affiliate. The better you understand yourself, the stronger and more inclusive your culture will be, and the more effective this culture will be in supporting the success of your gym — both in terms of profitability and as a beacon of health. Your gym will not be for everyone. That is an impossible goal. It will be for anyone who shares the values of the culture you build and finds their personal journey represented in your methods and practices. Just as CrossFit training seeks to develop the broadest fitness possible, CrossFit affiliates likewise should demonstrate an inclusive community and culture.

Inclusivity is the product of representation. Again, let's consider programming. Inclusive fitness programming means teaching how to snatch as well as how to run a 5K. As an affiliate owner, you likely have a proclivity toward one movement or domain over another. However, if all movements and domains aren't part of an affiliate's programming, we know it simply won't be building the fittest athlete possible given what we know about the effectiveness of the CrossFit methodology. By definition, the program will not offer inclusive fitness and therefore not CrossFit.

"Fitness in 100 Words" does not say, "Just practice crushing met-cons every day." Even if some of your members may want that, it is ultimately not the culture of CrossFit programming. That means inclusive practice requires work and deliberate reflection. Just as you will assess your programming for gaps, you must equally assess your gym's culture and community for gaps. From there, you can work to build a culture that integrates those who may not organically be represented as coaches and members. Leverage

your culture to fill those gaps. The investigation of why certain groups are absent will yield a stronger community. Active facilitation of inclusivity and representation to foster and cultivate diverse teams and members will build greater strength in your business and community.

Just as we're encouraged to regularly learn and play new sports, as leaders we must also regularly learn to extend our communities beyond ourselves. The definition of CrossFit's fitness has four tenets to prove its veracity. The definition of CrossFit's communities can benefit from the same:

## 01 Celebrate everyone.

- Members want your attention. When they see that attention go toward everyone, they understand it's important to you, and they will model that behavior.
- Broadly discuss body types and physiques in terms of what they can do, not physical appearance.

## 02 Ask, "Who is not here?"

- Seeking greater representation does not happen accidentally. Not seeing color, body size, gender identity, or sexual orientation isn't an option, because people of color and those who experience marginalization due to body size, gender identification, sexual orientation, or any other reason are very much aware of an absence — or, at the very least, underrepresentation — in your space.
- Members who identify with you will connect faster with you. Members who don't, won't. Therefore, a strong community requires representation in coaching and staffing that matches a diverse community.
- Again, this does not happen accidentally. You can easily attract those who identify with you, but your most powerful potential as a leader will come from creating a culture that transcends you. That becomes a community.

## 03 Use non-gendered outcomes.

- Physical expression comes heavily bound in gendered language, which can present limitations.
- Discussing equipment and actions in terms of purpose and stimulus will create space for flexibility and inclusion, not to mention better coaching. For instance, how many times have you watched a new person identifying as male pick up a 45-lb. barbell because they saw other men doing it when they had no business using it? All the time. Rather than a men's bar and women's bar, there are distinct advantages in building inclusivity by simply identifying the bar by its load and/or size.

## 04 Foster intention, not expectation.

- What is the difference between programming a 1-rep max and a heavy single? Intention. In this example, if the athlete doesn't set a personal record, they are more likely to feel defeated. A heavy single still checks the program inclusion checklist of a compound weightlifting movement, but what members achieve is a feeling of accomplishment while we know they are getting fitter. This doesn't mean to never program a 1-rep max, but instead, understand how words and language frame intentional practice.

“Surround yourself with people who see greatness within you, with those who motivate you to become the best version of yourself.”

- quote from a CrossFit affiliate owner



# **SERVE**

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## **Ways We Serve Our Community Better**

### **Listen**

- Listen with undivided attention.
- Relieve yourself of any pressure to have all the answers. It's OK to say, "I don't know."
- Focus on understanding each member's pain points and passions. Why are they here? Why did they join your gym? What are their goals? What are their concerns? Listen first.
- Wait to speak, and be patient in providing input or a response before you've fully heard them.

### **Be a Professional**

- Act with a sense of responsibility toward your members and potential clients.
- Picture yourself as a problem solver of health and fitness.
- You won't have every answer in the moment, but follow up when you do.
- Represent your service and prices with confidence.
- Follow proper procedures to record contact and emergency contact information, onboard, and get new members started safely.
- Treat all team members and gym members with fairness and respect.

### **Forget Your Previous Biases**

- Never judge a client by their physical appearance or background. Never assume you know what they want or what kind of experiences they have.
- Don't put an artificial cap on what you perceive they will value about your service.
- Remember their goals and needs are always important. This brings you back to the present moment and the ultimate purpose of your affiliate.
- Employ transparent, consistent, and informed decision-making processes, both when hiring team members and when setting expectations with clients.

### **Believe in Your Product**

- Thoroughly know what you are offering. Know your industry, your competition, and the story of your business.
- Have personal stories and testimonies that build rapport and relationships. These will help humanize your products and generate emotional connections to your business.
- Provide as much information as possible to your members without overwhelming them.
- Be approachable and make sure members know they can always follow up with you should they have further questions or concerns.



# **BUILD**

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## **Community Building**

Community is one of the core values of the CrossFit brand. We're proud of the strong communities that have been built in CrossFit affiliates around the world. Through our efforts and yours, CrossFit has come to represent a powerful community inspiring health, happiness, and performance around the world.

### **Building a Strong Sense of Community**

Being part of a community is an experience — a feeling of belonging. A strong psychological connection is forged when someone feels as though they belong and have the right to belong somewhere.

Your members are the heart of your community. To make sure they can experience a feeling of belonging and acceptance, reflect on the environment at your affiliate and how you welcome and receive individuals walking through your door. Throughout this section, we'll map out some best practices on how to build a sense of belonging and a cohesive community in your affiliate.

### **Determine What You Are Building Community Around**

To build a cohesive and integrated community, you must determine what the common bond is that can unite your members. One key element is fitness, but this is the service you provide, not the common bond around which members rally and identify. Reflect deeply on the specific elements and core values that build cohesion, unity, and camaraderie at your gym — all essential elements of community. Of course, if you define your community around too small a niche, it will likely disenfranchise many and benefit only a few.

### **Host Events That Reflect Your Community**

Special events are useful for building community. To reinforce your community as inclusive, events should be open and accessible. Events should also be varied and not necessarily directed toward one central theme. That said, if an event centers on a theme, ensure subsequent and future events account for the entire gamut of your affiliate's diversity. Not all events need to be fitness related. For instance, social impact days can help drive cohesion and social awareness as members rally around a specific service-oriented objective in the community. Holiday or seasonal events are a great way to come together outside the gym.

### **Show Up**

As the owner, you should be part of the community. Be present both in day-to-day operations and during special or ad-hoc events. In doing so, you'll be able to identify the general sentiment among members and staff and determine how effectively you are building community. Are people smiling and talking to one another or are classes or events lightly attended with people breaking into cliques? These types of characteristics within your gym will be obvious to you as soon as you walk in. In addition to special events, you also need to regularly be on the gym floor interacting with your members to immerse yourself in the community.

## Brand Consistency

A key part of building your local CrossFit affiliate community is establishing a consistent brand identity. To do so, think about the elements that tie together your core concepts, facilities, members, and staff. Have you created a visually and behaviorally stimulating narrative that resonates with your core values and community? In building your brand identity, think broadly — from coaching style to amenities to special events. This will send the message to your members that you are part of one community rather than multiple disjointed splinters within it. Everything you do is intentional and ensures your members feel like they are part of something bigger.

Playbook Resource Center:  
**Brand Assessment**

Playbook Resource Center:  
**Sample Branding Guidelines**

## Know Everyone's Name

This is so simple yet such a critical element in building and sustaining a community. You and your staff should greet every member by name as soon as they enter the gym and when they step onto the floor for class. This means a lot to members and sends the signal that they belong.

## Gym Hygiene

This may seem basic, but a clean gym is fundamental to ensuring a safe and welcoming environment where you can proudly build your community. You should undoubtedly have a clean space and facility. This includes organizing the facility and equipment so it meets the needs of your members and maximizes your operational efficiency. Everything should be ordered and planned with the intention of creating a clean and safe space for members. Gym hygiene extends further to ensuring your staff exudes a positive, happy, and fun vibe. Keep in mind the multidimensional nature of your members. Many arrive at your facility carrying the daily stresses of life, and they use your program, community, and facility as a means to decompress through fitness. It's your job to be the place where they can let go of those stresses and feel at home. When someone's life is full of chaos, they need the opposite from you — and that's order, positivity, and cleanliness.



# EXPERIENCE

## THE MEMBER EXPERIENCE

### Member Experience Checklist

- Greet everyone with a smile and use their names.
- Create a safe and healthy environment.
- Coaches are properly prepared to instruct a great class.
- Staff remember our problems aren't our members' problems.
- Music is not offensive.
- Praise publicly and correct privately/quietly when and where needed.
- No distractions by anything outside of class.
- We ask ourselves regularly, "Are we doing the best we can?"

## The Best Hour of the Day

The goal is to create a welcoming and safe environment for your members. You should strive for their daily workout to be the best hour of their day. Similar to what we discussed above, everyone should feel a sense of belonging when walking through your doors.

## Positive First Impression

- Know your members. Welcome each person who enters your doors and greet them by name. Start and end each conversation with a sincere smile.
- Welcome new members with open arms. Ensure they are oriented with your facility, and highlight expectations you may have of them and what they can expect from you and your staff.
- Go first. Don't wait for someone else to say hello or introduce themselves. Make sure all new faces get introduced to the group. Don't let a new face stand alone at the door.
- First impressions set the stage for the day. What does the athlete see, feel, and smell when they walk in? Each day when you walk through the door, take note of your own reaction and how you can make that experience better.
- Clients come from all walks of life. We don't know what kinds of stressors they're dealing with outside the gym. Show compassion for members who show up frazzled, grumpy, or late to class. We can't assume we know their circumstances. You can only do your best to welcome them and help them start a great workout that leads to the best hour of their day.

## Safe and Secure

- Member safety should always be a priority.
- Ensure you follow all country, state, and local regulations as well as any [Affiliate Insurance Requirements](#).
- Front desk and administrative onboarding functions are often the first line of defense. Make sure all members, new members, and drop-ins sign waivers. When new members and drop-ins sign waivers, ask about injuries, health issues, or safety concerns. Capture that information in the athlete's profile.
- When class begins, coaches should also ask these questions of experienced athletes so they can get a pulse on the health and wellness of the community.
- The layout of the facility and the equipment should be staged in a manner that is safe. Keep an eye on not only where equipment is placed but also where people are doing various movements, particularly relative to other athletes and equipment. For example, is an athlete performing kettlebell swings in close proximity to someone lying on the floor performing sit-ups? Are athletes using barbells that may accidentally interfere with an athlete performing toes-to-bars on the rig? Foresee every possible accident before it happens and adjust equipment or athlete layout as needed to keep people safe.

- Clean all the equipment regularly. Surfaces and equipment should be cleaned and disinfected often. Your members should wipe equipment after use. If athletes bleed on a piece of equipment, set it aside to be cleaned thoroughly using [EPA Disinfectant Guidelines](#).

## Have Fun

- Create an enjoyable experience for everyone.
- Maintain a positive attitude. The coaches and staff set the tone for the energy in the room. The members in a 5-a.m. class are only as awake as their coach. Always be a few notches ahead of your class when it comes to delivering positivity and energy. Point out the positives even amid the most negative feedback from your clients.
- Help clients celebrate small wins. See and convey the progress of your clients even when they have trouble realizing it themselves. Point out the improvements they've made as part of their fitness journey — where they've been and how far they've come. Help them track progress. Celebrate personal records (PRs) publicly.
- Venting about or discussing job-related issues with members is unacceptable. We want members to forget their daily stresses and worries when entering the affiliate, not be exposed to new ones.

# Building Meaningful Relationships

Your members are the lifeblood of your affiliate. Take a genuine interest in getting to know them. Here are some suggestions for questions you can ask to get to know them better. Of course, leverage these questions throughout various interactions with any one member. Don't overwhelm them on their first day, and don't make any assumptions when asking questions. Be open-minded to their response. Build relationships and get to know them over time. The key is to ask thoughtful and meaningful questions.

- What is your name? How do you spell that? Were you named after someone? Do you have a nickname? What do those closest to you call you?
- Where are you from? Where were you born? What do you consider to be your home?
- Did you grow up here? Are you new to the area? How long have you lived here?
- Where is your family from? Do any of them do CrossFit?
- What do you do for work? How long have you worked for them?
- What do you love most about your job?
- What is the most rewarding part of what you do? How did you get into that field?
- How was your trip?
- Have you traveled and dropped into any other gyms before?
- What do you like to do for fun besides CrossFit?
- Do you like to cook/bake?
- What's your favorite food? Favorite restaurant? Did you play any sports growing up?
- Do you have any hidden talents?
- Do you like to read? Watch movies/TV? Listen to podcasts?
- What's your favorite book/movie/TV show/podcast? Why?
- What's a goal you have outside the gym?
- What's on your bucket list?
- When did you start with us? How are you enjoying the gym so far?
- What was your first CrossFit workout like?
- How is your body feeling today? Is anything sore or bothering you today?
- Did you come yesterday? How was it?
- What's your favorite/least favorite exercise or benchmark workout?
- What's the current fitness goal you are working toward?

Playbook Resource Center:  
**Culture, Community, and Member Experience Resources**

# BUILDING YOUR BUSINESS



# BUILDING YOUR BUSINESS

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## Pillars of a Successful Affiliate

### CORE VALUES, MISSION STATEMENT, & VISION STATEMENT

- Purpose, goals, and priorities
- Culture and community

### CUSTOMER EXPERIENCE

- Environment and ambience, inclusivity, safety, programming, and community

### SALES & MARKETING

- Knowing what you do and why you do it — the story
- Internal and external marketing

### FINANCES

- Managing budgets, mitigating expenses, and projecting the road ahead

### TEAM

- Human resources (HR), onboarding, training, continuing education, and workplace culture

### SYSTEMS & BEST PRACTICES

- Step-by-step process to create consistency within the day-to-day operations of your business
- Proven methods within your systems that have shown optimal performance and/or the most positive results

## Build a Business Plan

Regardless of where you are in your journey as an affiliate owner, having a business plan is crucial. Periodically adjusting the plan to meet the changing needs of a growing or evolving business is also important. Does your business plan need to be a 30-page presentation? No. However, having a plan will create a clear path toward success and support your efforts to achieve your business goals. Whether it's in long form, slides, or a simple set of bullet points, knowing where you are and where you are going are keys to success.

▶▶ Playbook Resource Center:  
**Building Your Business**

▶▶ **Sample Business Plans**

A formal business plan is not as high of a priority for in-operation affiliates as it is for new affiliates, but it still can be a useful resource for measuring current success and re-evaluating strategies for future operations. If you are looking to raise money, need a presentation for the city, a tenant proposal, bank credit line, etc., those stakeholders usually will require a business plan to support those types of requests.

# What Is the Purpose of a Business Plan?

The purpose of a business plan is to create a roadmap that provides direction for your affiliate. It provides structure so you can identify, describe, and analyze your business opportunity while examining its technical, organizational, and financial feasibility. A business plan is also a useful tool to help assess and reconfigure a business that is already underway. Whether you're starting a new business or acquiring an already operating one, the business plan is a vital document that will help identify the goals of the business and the methods and timeline for achieving them.

One of the more impactful takeaways will be understanding the reality of the business model you are hoping to implement. Below are some focus areas to help you visualize and outline your plan while shaping your strategy going forward. Use these general focus areas to think through your tentative business goals and approach.

## 01 Business Vision

Business vision refers to the direction you want to see your business grow in the long term. Answer these questions in your business plan:

- What kind of business do you want to have?
- How will you accomplish that?
- What are the goals of your affiliate?
- What will success look like?
- How would you like to be perceived as a business by members and the outside world?

## 02 Business Mission

Your business mission will encompass your business objectives and your approach to reaching them. It will be action driven and should further define the purpose of your business. Looking at your mission statement in three parts can help when defining and describing it.

- Key market - Your target audience and general marketplace
- The product - i.e., CrossFit, coaching, mentorship, health, wellness
- Competitive advantage - Why you?

»» Jump Back: Core Values & Mission Statement

## 03 Action Plan

To support your business vision, you will want to have a clear and concise action plan mapped out that shows how you will achieve your main goals to become profitable and sustainable. The action plan highlights how specific and key goals within your business plan will be achieved.

Think SMART: Strategic, Measurable, Attainable, Relevant, Timely

## 04 Operator / Ownership

In most cases, the owner/operator is you and potentially a business partner, if you have one. If you have already identified an additional manager for your gym, it may be worthwhile to include them in the development of the business plan. No matter what, you will want your plan to map out how you plan to grow — adding coaches, front desk management, general support, and/or sales and marketing.

It's a good practice to identify the roles, responsibilities, contributions, expectations, and qualifications needed to be suitable for any one position. While the positions may evolve as your business grows, it is useful to start visualizing hiring needs as you set out to create your business plan.

## 05 Executive Summary

The executive summary is an explanation of what your business/affiliate does and what puts it in a unique position to succeed.

You will want this to be organized, well thought out, concise, and easy to navigate. More is not necessarily better.

**QUICK TIP:** Although the executive summary is in the first section of a business plan, it is best to write it last, after the rest of the sections have been written. This is simply because the executive summary essentially paraphrases the important aspects of the other sections.

## 06 Target Market

Your target market is the specific group of people you are aiming to acquire as members. This is the member base around which you will build your community. Yes, we want to be broad, because CrossFit is for everyone. However, knowing the general makeup of your area and realistic client base is important. For instance, do you live in a college town in which during the school year the primary target customer is 18 to 24 years old? Do you live in a metropolitan area where the primary customer is 26 to 40 years old? Do you live in a suburban area where the primary customer has a family and balances multiple obligations? Knowing this will allow you to manage your plan, culture, and marketing methods to meet the needs of your community.

▶▶▶ [Jump to: Target Personas](#) 

## 07 Local Market Analysis

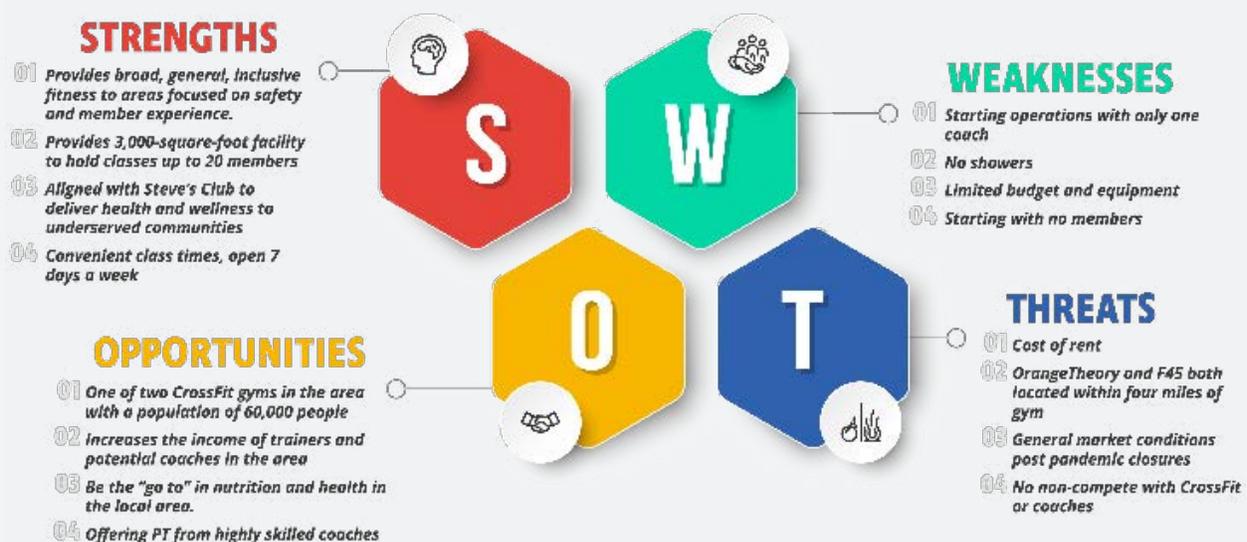
A market analysis studies the attractiveness and dynamics of your local market within your particular industry. For your affiliate, that would be health, wellness, and fitness. Analysis of local markets includes average household income, average age, percentage of married couples, and may even be as specific as the percentage of people who have gym memberships. There are endless areas and themes to research when performing a market analysis, so determine which aspects of your customer base are important to you and analyze the local market relative to those needs. Through these analyses, you can help identify your company's strengths, weaknesses, opportunities, and threats (SWOT).

# What Is a SWOT Analysis?

SWOT stands for strengths, weaknesses, opportunities, and threats. Strengths and weaknesses are internal to your company — things you have some control over and can change. Examples include who is on your team, the programming you choose to implement, and your location. Opportunities and threats are external — things that are going on outside your company in the larger market. You can take advantage of opportunities and protect against threats, but you can't change them. Examples include competitors, equipment prices, and customer trends. A SWOT analysis organizes your top strengths, weaknesses, opportunities, and threats into an organized list and is usually presented in a simple two-by-two grid.

## How To Do a SWOT Analysis

- Determine the objective. Decide on a key project or strategy to analyze and place it at the top of the page.
- Add strengths, weaknesses, opportunities, and threats. Add factors that affect the project to the applicable boxes. Components of a SWOT analysis may be qualitative and anecdotal as well as quantitative and empirical in nature. Factors are typically listed in a bullet form.
- Draw conclusions. Analyze the finished SWOT diagram. Be sure to note if the positive outcomes outweigh the negative. If they do, it may be a good decision to carry out the objective. If they do not, you may need to make adjustments to ensure the business is viable and the goals achievable.
- An example SWOT analysis is identified below. These factors are imaginary and only used to illustrate the use of a SWOT analysis. There are undoubtedly a myriad of factors that will affect the SWOT of your specific business.



## 08 Potential Membership Market Base

In your business plan's market analysis, be sure to discuss the size and type of marketplace that surrounds your business. This can be measured by several different factors, including the gross number of gym goers in your surrounding area; the number of competing fitness-based facilities, other affiliates, corporations, or universities located in your area; the size of the general population between 18 and 65 years of age; and the size of the under-18 population if you plan to offer a kids program. Any business or organization that could be a competitor in member acquisition is smart to review. This will help you better understand the existing health and wellness marketplace of hobbyists, enthusiasts, and active gym members who could serve as a potential membership base for your business.

## 09 Competitive Advantage

In this section you will want to talk about your competitive advantage. This refers to the advantages your location, affiliate, programs, products, or services have over those offered by competitors.

Some questions you might ask yourself:

- *What makes my product better, stronger, or more viable than other products?*
- *Why would a potential member choose my location over other gyms?*

## 10 Sales and Marketing Strategy

The development of a sales and marketing strategy serves as a master plan that will develop over time. It's a great exercise to do at any stage of your business, as effective methods for pursuing leads and membership generation tend to shift over time. You should include information about products, pricing, branding, competitors, and distribution channels. Think about your local demographics and how engaged they are in social media. Your sales and marketing strategy should include potentially creative or innovative methods to help grow your membership base. For instance, is there a popular farmers market or public park you can market to on a regular basis?

In addition to identifying and developing appropriate marketing channels, also assess the associated costs. What are the costs involved in social media advertising? If you want to hand out flyers, you will need to purchase printed materials. No matter the methods of marketing, keep in mind any marketing effort will have an associated cost.

## 11 Sales Forecast

The sales forecast estimates the potential members you plan to onboard throughout the initial phases of your business. How many members do you plan to sign up before you open? What about in the first 90 to 120 days? What about in two to five years? This will be heavily influenced by your local market, schedule, coaching staff, expenses, and operations.

A sales forecast and the growth of your membership are closely tied to the logistical constraints of your business, which may include the size of your facility, the number of coaches and staff on hand, and the daily schedule. For instance, if you have a 2,500-square-foot facility and operate one

morning and four evening classes, you will be limited not only to the convenience of offerings but also the number of people you can fit in your space. We will cover more about this in the finance section, where you can use the financial calculator to better build out portions of your sales forecast.

Another important factor when forecasting membership and revenue growth is understanding churn rate — what it is, how to calculate and plan for it, and how it impacts the business. A churn rate is the percentage of your total membership you lose during any one period of time. It's generally every affiliate's goal to mitigate churn or member loss as much as possible.

When factoring churn, member growth, and general forecasting, you will want to track two key membership data points. These will be the baseline for a number of other metrics that will be covered in the following section about assessing your gym's general financial health.

- 1 **Gross New Members/Adds = Total number of new members you acquire in any given period of time**
- 2 **Net New Members/Adds = Total number of members added once you subtract the # of member cancellations**

A healthy churn rate or percentage is 2 to 3 percent. Anything above that would be cause to figure out why you're losing so many members. To calculate your member churn rate, select a specific period and divide your number of lost members during that period by the number of members at the start of the period. Then multiply by 100 for the percentage that represents your member churn.

During the pre-opening phase, when you do not have base metrics to use, you can use the 2- to 3-percent churn rate to understand how long it will take to achieve your membership growth goals.

▶▶▶ [Jump to: Financial Planning](#) 

## 12 Revenue Model

This factor helps you understand which primary products and offerings will generate revenue for your business. The foundation of your revenue model for your affiliate is likely your membership base, but this can be influenced by the services you provide. Additional revenue drivers will include any other products or services you plan to offer. Beyond identifying the services and products you will offer, you will need to determine the prices at which they will be sold.

Start by thinking big, then dial it back to what you can feasibly launch or have access to. Here are some questions to ask yourself as you build out this section:

- *Do you have knowledge of these offerings or access to experts in the field?*
- *How and why is the product or service priced this way?*
- *What are the associated costs, and what is the profit potential?*

## 13 Operations Plan

In this section, write out exactly how you plan to operate. Are you a full-time location? Do you have another job? How will the staff report? What are the day-to-day, week-to-week, or general monthly standard operating procedures?

The more detailed, the better. Think through everything you want to do to make this the absolute best experience for your members while creating a healthy work environment for you and your staff. Work through the broad strokes first; then get into the nitty-gritty details.

## 14 Organizational Structure

As your business grows, build out the organizational structure, taking into account how many new trainers and front desk staff you will need to meet the demands and services of your business. In the beginning, many of us have one name on the org chart doing every job, and that's just fine.

During this phase of the business plan, however, take the time to build out the roles you'll ideally have once you're able to hire more people. This may include a manager, head coach, assistant trainers, or front desk staff.

▶▶▶ [Jump to: Job Roles & Responsibilities](#) 

## 15 Financial Plan

The financial plan is the final section of a business plan. It details how you plan to achieve your business goals, generate revenue, and make a profit.

In business, “generating revenue” means making money or earning income. Your financial plan will help determine whether your business has enough money to sustain itself until it breaks even or earns a profit. The financial plan is where most would recommend you spend the bulk of your time, and don't be shy to ask for help. If planned poorly, falling short on finances can put you in a real predicament down the road.

When establishing or updating your business structure, it's highly recommended you seek professional advice from an attorney or a certified public accountant (CPA). They can best guide you based on your business goals, location, and other dealings. Not everyone's situation is identical, so working with an attorney or CPA is an appropriate route to take to protect your general assets. Here is a reference image from the Small Business Administration (SBA) showing the differences in legal entities.

# Legal Entities

*according to the Small Business Administration*

Business Structure	Ownership	Liability	Taxes
<b>SOLE PROPRIETORSHIP</b>	One person	Unlimited personal liability	Personal tax only
<b>PARTNERSHIPS</b>	Two or more people	Unlimited personal liability unless structured as a limited partnership	Self-employment tax (except for limited partners) Personal tax
<b>LIMITED LIABILITY COMPANY (LLC)</b>	One or more people	Owners are not personally liable	Self-employment tax Personal tax or corporate tax
<b>CORPORATION - C CORP</b>	One or more people	Owners are not personally liable	Corporate tax
<b>CORPORATION - S CORP</b>	One or more people, but no more than 100, and all must be US citizens	Owners are not personally liable	Personal tax
<b>CORPORATION - B CORP</b>	One or more people	Owners are not personally liable	Corporate tax
<b>CORPORATION - NON-PROFIT</b>	One or more people	Owners are not personally liable	Tax-exempt, but corporate profits can't be distributed

▶▶▶ [How to Start an LLC](#)

▶▶▶ [How to Choose the Best Legal Structure for Your Business](#)

# Purchasing Equipment

Should you lease or buy your equipment? Every affiliate owner is in a different financial position when they decide to open a gym. However, the upfront cost to purchase equipment is almost always the largest expense across all new CrossFit affiliates, from garage gyms to 10,000-square-foot facilities.

An affiliate owner has a number of options to choose from when purchasing equipment, but we will look at the two most common: buying and leasing.

Buying equipment is the most common, because it involves just purchasing all the required equipment with cash or credit. This means the owner needs to have significant cash on hand when opening the gym, but at the same time, owners are mitigating their risk since they now own the equipment as an asset.

## Pros

- Ownership – Once purchased, the equipment is your property and an asset for your business.
- Possible tax incentives – Section 179 of the Internal Revenue Code allows you to fully deduct the cost of some newly purchased assets in the first year.
- Possibility of depreciation deduction – While not all equipment purchases are eligible for Section 179 treatment, you can still receive tax savings for almost any business equipment through depreciation deductions.

## Cons

- Higher initial expense – You have to have the full price in hand to purchase, which may not be possible.
- Getting stuck with old equipment – Ownership is the biggest advantage but can also become a disadvantage if the equipment breaks or becomes obsolete.

Leasing equipment is another very common practice, because it allows a gym owner to acquire equipment with more capital than they have in their gym bank account. Leases add risk to opening a facility, because the owner is now on the hook for the monthly payments and potentially growing interest if they are unable to pay in a timely manner. Most fitness manufacturers work with equipment leasing companies, and when planning to purchase equipment, an owner should take into consideration the various offers and potential risks that come with each path.

**Pros**

- Less initial expense – The primary advantage of leasing business equipment is that it allows the owner to acquire the equipment without spending as much capital.
- Possible tax deduction – Lease payments can usually be deducted as business expenses on your tax return.
- Flexible terms – Different providers can present different terms on the lease. An affiliate owner should review all options and weigh the risks and rewards before selecting a lease.
- Equipment loans are generally self-collateralized, meaning you will not have to guarantee your loan against personal or business properties.
- These types of loans are not usually based on strong personal credit or credit scores, which makes them a bit easier to acquire.

**Cons**

- Higher overall cost – Leasing an item is always more expensive than purchasing a product due to the monthly installment costs and potential interest expense.
- Ownership – The owner does not own the equipment until the payments are made in full.
- Obligation to pay for the entire lease term – You are legally obligated to pay per your lease terms.
- Large down payments – Not all lenders will fund 100 percent of the equipment costs, which may require you to put up larger down payments to cover the difference.

## Loans and Applications

If you prefer to lease or get a loan to purchase your equipment, we have provided some external links to help you navigate your journey.

▶▶ SBA 504 Loan / Fixed Assets

▶▶ SBA (7a) - Equipment Loan



CROSSFIT



# OPENING ROADMAP

# OPENING ROADMAP

As you start the process of opening your affiliate, there are a million and one things to consider. The outline below explains which factors you should think about when picking a location and preparing to launch your affiliate business.

## Location Scouting

Below is an outline of key points you will want to annotate as you go through the location scouting process. Many of these items can be red flags and cause a hard stop in your negotiating process. The goal of this section is to give you a set of general guidelines to help mitigate expensive mistakes.

### – Local laws: What am I permitted to do? What am I prohibited from doing?

#### • Building Code / Variances / Occupational License

- Generally, the local area in which you choose to open your affiliate will have zoning guidelines. The guidelines below provide elements to be aware of and, depending on your city, country, or state, may outline which activities you can and cannot execute within your respective area or location. Physical fitness and/or group class instruction may not be permitted.

#### • Noise Ordinances

##### - City Sound Transmission Code (STC)

- Is your location in a “quiet” zone? What are the residential surroundings like?

##### - Structural (Vibration)

- Check the general structure of your building to understand its rigidity and ability to muffle, mitigate, or prevent sound.
- We highly recommend you do a music and weight dropping test before proceeding with the negotiation process. This will give you a clear understanding of how the noise will travel and potentially cause issues. It is always recommended you seek out local sound mitigation specialists. They generally are listed under “noise control consultants” or “acoustical engineers.”

##### - Airborne (Music)

- Also do a light, mid-level, and loud music test. Simulate a coach yelling and the noise of weights dropping and clanging. Using one of the listed professionals above will help ensure the most accurate set of data to understand potential noise disturbance issues.

- **Drop Testing – Will athletes be able to drop weights in this location?**

- Certified drop testing - Though this is costly, you can hire a high-level expert in noise mitigation and engineering if necessary.
- Acoustical engineers and noise control consultants - They can build out a detailed map of how to overcome noise issues.
- Be sure to test for noise, as this could make or break your decision to move forward on a location.

- **Americans With Disabilities Act Compliance (ADA) — Am I up to code?**

- ADA compliance areas to highlight include but are not limited to egresses/exits, ramps, access points from the street, showers, and bathrooms. We highly recommend that you research your local ADA compliance codes, as they will spell these requirements out in detail.
  - An example of requirements in many cities are as follows: All offerings in your location must be accessible to everyone. For example, bathrooms with ADA access on the second floor instead of the first floor would be an issue.
  - Visit [ADA.gov](https://www.ada.gov) to review laws and regulations.
  - Website compliance
    - This is very important — and not just for legal reasons but for inclusivity. If your web developer cannot easily convert your site for the hearing and vision impaired, there are many companies that can do so easily. An example of ADA-compliant websites are ones that are screen-reader accessible.
    - Visit [W3.org](https://www.w3.org) to review web content accessibility guidelines.

- **Board of Standards and Appeals (BSA), Board of Zoning and Appeals (BZA), and Environmental Advisory Board**

- You may be required to present a proposal to your local elected officials and/or city-hired agencies on your operations related to water usage, waste, and environmental impact. Many cities have formed these to protect the growth within their districts. Don't assume you are allowed to operate in an area solely because the landlord says it's allowed. Do your research and coordinate with the appropriate agencies.

- **Chamber of Commerce**

- With a simple Google search, you can seek out your respective Chamber of Commerce points of contact and begin a dialogue. They are in place to assist businesses just like ours. With a very experienced knowledge base of the local area, they can be great assets in facilitating pre-opening and grand opening processes.

- **The Path of Least Resistance**

- Using the Affiliate Finder Map, you can easily spot licensed affiliates within your preferred area. This can help you establish some distance between you and the nearest affiliate. While CrossFit is an open-source, licensed affiliate model that does not, in its design, put distance markers between licensed locations, many successful affiliates have found that giving ample separation based both on physical distance and population density has supported better membership growth. Adequate spacing can promote a healthy culture within a local fitness community as well.

# Physical Location Rating

Your rating of the quality of a location can fluctuate based on many variables and factors. Take the time to rank your options based on the items highlighted below. This will not guarantee a perfect location, but it could save you from a long-term and costly mistake, including legal issues or unforeseen challenges. Many well-known entrepreneurs will say that for brick-and-mortar businesses, leases can make or break the business since you are at the mercy of your landlord and the physical space. Even if your growth or expansion plans have you moving to a new space in the future, moving in any way, shape, or form rarely occurs without some impact to the business.

**Bad, good, better, best** - Use the bullet points below to rate each item with bad, good, better, best, or a number-based ranking system of your choosing (e.g., 1-5). This is meant to be thought provoking, so add to the list as you see fit. Be your own devil's advocate when it comes to proposed locations. Often, listing all the reasons not to sign a lease is more valuable than listing the reasons to sign a lease.

## - Physical structure

- When was it built?
- What is it made of, and what's the rigidity (brick, wood)?
- What level is it on (i.e., ground floor, basement, top floor)?
- Who are your neighbors? Are they likely to be an issue or sensitive to noise?

## - Location

- Ease of access (i.e., near a U-turn, stuck off a one-way street, back of a congested plaza, etc.)

## - Visibility

- Can people see it from the street as they drive by?
- Where would your signage go?

## - Vehicle traffic

- Less traffic is bad; more traffic is better. High traffic with quality road management is best. You may be off a major exit, but if it's bumper-to-bumper, it could hinder the convenience.

## - Pedestrian traffic

- A general finding across many brick and mortar businesses is the higher the pedestrian traffic, the easier it is to garner organic leads from those passing by. Capturing pedestrian traffic can be more successful than drive-by traffic, as you will have a better chance of connecting with a potential member, whether it be through the distribution of informative materials, human interaction with a staff member, or curb-based signage.
- Having other popular consumer retailers nearby (i.e., in strip malls, shopping centers, restaurants, public venues, or parks) is conducive to having more pedestrian traffic.

## - Parking

- Well lit, number of parking spaces, where are they located, are they secure, ease of entering and exiting, shared with other businesses, limited hours of access?

## - History

- Area flooding, events, parades, street closures, violence?
- Have other similar businesses rented in or near your location that have succeeded or failed? This could be a telling sign for what to expect. It's not finite but gives good records of what and why.

**- Other businesses**

- Are there other industries thriving in your area?
- Is it a developing area?
- Are they well kept, trendy? Do they draw foot traffic?
- Who is around who may positively or negatively impact your affiliate?

**- Proximity**

- To running loops
- To other CrossFit affiliates
- To other gyms
- To businesses, homes, universities

## Market Research

Market research will help you as you walk through and build out your business plan, future goals, future expansion, and marketing campaigns. You can use the list below as a checklist to guide you through the strong and weak points of your local proposed marketplace. Depending on where you are located or looking to locate, these points will be more or less relevant to your decision.

**- Key Points**

- **Traffic density**
- **Demographics**
- **Local economic growth indicators**
  - Cost of living increases over a certain number of years
  - Household income growth over time
  - Unemployment rates
  - Housing costs increase or decrease
- **Average market rates**
  - For rent
  - Other fitness facilities in the local area
- **Competition density**
  - Who are your competitors, and how many competitors are there?
- **Market demand**
  - Means of analyzing local success rates of competitors
  - How long have competitors been operating?
  - Any closures in the last one to five years?

Your local chamber of commerce may be a good source for much of the information above.

# Negotiating a Lease

To help you mitigate your risk, liability, and financial exposure throughout the entire lease process, here is a general list of things you may want to consider as you go through your lease negotiation, expansion, relocation, or renewal process.

## – Broker representation vs. owner direct

### • Pros and cons

- One con of using a broker when searching for a location is you may be responsible for any broker fees incurred. It's not common but something you'll want to sort out before agreeing to exclusive representation.
- The pros are more apparent, as the broker who represents you should take on the responsibility of having your best interests in mind. They come with expertise in the local markets, understanding of lease negotiations, and have keen knowledge of nuances the space may be facing.
- It is your responsibility as the renter to do as much of the due diligence as possible before signing and committing to anything.

## – Proposed use to landlord — the landlord may request to know the proposed use of the space they are renting

### • Potential presentation for intentions of use:

- This may be a presentation explaining the intentions and use of the space. This can also be a pared down version of your business plan (excluding the financials).

»» Playbook Resource Center: [Opening Roadmap](#)

- This may be the same and/or similar to the proposal used for your local city boards and committees.
- **This presentation may also require a general floor plan of fixed equipment, non-fixed equipment, structures, etc.**
- **This presentation can also be used for the city, if needed.**

# The Lease

## – Terms — How many years? Are there options to renew?

- You may want to define this early in the negotiation process. For instance, if you are only signing a three-year lease with no options to renew, you are potentially in a predicament before you even open. Assuming it takes you 12 to 16 months to ramp up your business, you've already burned through 50 percent of your lease. Now you are in a place to have to renegotiate, which could cause a major increase in rent or possibly force you to move. If your area increases in value or the landlord wants to replace you with a higher-profile tenant, you could be asked to pack it up. Investigate these liabilities early and often throughout the lease process. Don't allow your eagerness to get the space force you into a bad decision.

- Triple-net (NNN) vs. gross lease
  - A triple-net lease is the opposite of a gross lease in terms of payment for utilities, taxes, repairs, and any other additional expenses. In a triple-net lease, the predetermined rent is typically lower, and the additional costs are not included in that publicized rate. It's important to build out all potential additional costs into your monthly rent to have a clear assumption of your overall lease-related costs.
  - A gross lease is a type of commercial lease where the tenant pays a flat rental amount, and the landlord pays for all operating expenses regularly incurred by the ownership, including taxes, electricity, and water.
- Standard market increase (SMI)
  - SMI is usually inserted into most standard leases and has a regulated market percentage increase each year. This means the lease terms define a maximum that a landlord can increase your rent each year without prior discussion or negotiation. You should assume they will impose the max percentage increase allowed.

### Jump Back: Business Model

- Is your lease pricing you into a difficult financial situation? What does this mean? Leases generally have escalators that kick in yearly or at the new term of the lease. You want to closely review these percentages and dollar amounts while factoring them into your financial forecasts. Often, when these things are left unattended, you will find your profit margins suffering as expenses continue to rise.
- “Cans” and “cannots” of the physical location per your lease agreement
  - Be sure your landlord and the lease clearly state your intentions of use and outline absolutes that are forbidden.
    - You may find out something like yoga is not permitted, as it's a conflict with an existing business if you are in a commercial strip.
    - Retail sales of consumables. Perishables.
    - Hours of operation - Some plazas and/or city ordinances may not allow businesses of certain types to operate before or after certain hours on certain days.
- Opt-outs
  - These are provisions in the lease that would give you or the landlord a legal means of getting out of the lease without possible penalty.
  - Negotiate prior to signing.
- Lease buyouts
  - If the landlord wants to terminate the lease for any reason, they may have a buyout clause with a set price of what it would cost to get you to move. You also may want to put such a clause in place in case you want to get out early and forgo legal and/or heavy financial penalties.

- Good faith clauses
  - Example language could potentially be: “All parties to this agreement hereby covenant expressly to deal with each other honestly, fairly, and in good faith in all respects, and to provide each other with reasonable further assurances in furtherance of their mutual performances with respect to this agreement.”
  - Depending on the exact setting, good faith may require an honest belief or purpose, faithful performance of duties, observance of fair dealing standards, or an absence of fraudulent intent.
- Personal guarantees vs. money guarantees vs. corp
  - Personal guarantees mean you and your assets are personally liable should you financially default on the lease. You can typically negotiate the ability to have this released after a certain amount of time or positive payment history.
  - Money guarantees mean your landlord may also allow you to put up more money in the deposit to forgo the personal guarantee. In plain language, this means that if you default on the lease, you would lose some or all of that deposit in return for protecting your personal assets and credit. This is something you should consider based on the lease costs and risks at hand. First, you will want to push for a non-personal guarantee and see if the security deposit and liquid assets of the company can secure the guarantee.
- Worst-case scenarios
  - This is a personal exercise you will want to do when weighing the lease and liabilities. Think of everything that could go wrong. Is everything addressed in the lease? Do you have a backup location of interest to give you more confidence in your negotiations? Are further lease negotiations required before signing the lease?
  - Bankruptcy, liabilities
- HVAC
  - Who is responsible for the heating and air conditioning? Is it your responsibility or the landlord’s responsibility to pay for general service, repairs, replacement? Such things can get costly. Another element to consider is how old the units are. What condition will they be in when you move into the space?
- Roof
  - Who is responsible if there are leaks and internal damage?
  - What happens if there is storm damage? These are also things that you should request from your insurance policy. Never assume any of these things are covered, as the costs can add up very quickly.
    - *Tip: Check your roofing drainage and date of last repairs, and possibly submit for an inspection of the integrity of the facility. Uncover the issues early and before they are entirely your issue.*

- Tenant improvement (TI) and rent abatements
  - When negotiating a lease, you generally can work in TI dollars and/or free months. Every landlord and location is different. Always ask. The idea is to have the landlord cover as many expenses within the build-out or building prep as possible prior to moving in.
    - *Tip: You can typically ask for three to six months of free rent while you perform a build-out or a certain amount of money per square foot. Some landlords will offer to “vanilla box” the location, which means they will paint all the walls and clean the floors, emptying the space to create a blank canvas for your business.*
- Lessee and lessor responsibilities
  - This is where you want to itemize every detail you and the landlord are responsible for with regard to service, maintenance, and repairs.

### – Parking

- How many spots? Who is responsible for maintenance, striping, etc.?
- If sharing with other tenants or nearby businesses, what are the specific terms?
- Handicap accessibility — What are the local requirements?

### – Legal review

- We highly recommend you hire an experienced attorney in lease review who can walk through much of the above and protect your best interests. Since many leases are a bulk of standard language required by local and state laws, the paid hours needed from an attorney can be limited. This will be some of the best money you spend.

### – First rights on expansion

- This allows you, the tenant, to have first rights to expand next door to an existing space if it becomes available. Of course, do this only if and when the time is right for your business and you are interested in doing so.

### – Signage: Fixed and non-fixed

- Building - What are you allowed to do on and/or around the building? What is the maximum size and/or style of sign you are allowed? Is it a box light, neon, downlights, etc.?
- Post - Are you allowed to add your business to the large post sign streetside? Which is your location on the post sign?
- A-frame - Can you place A-frames on curbs and sidewalks during business hours?
- Windows - Does your landlord and/or city allow window graphics? If so, how big and what type?
- Permits - Many cities will require you and/or your sign company to file for permits for almost any signage you choose to use on the exterior of the building in any capacity.

## EXTERNAL RESOURCES

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- ▶▶▶ [Business Plans: 20 Key Things You’ve Got to Know](#)
- ▶▶▶ [Sample Business Plans](#)
- ▶▶▶ [Managing Partnership Agreements](#)
- ▶▶▶ [Choose a Business Structure](#)
- ▶▶▶ [Assets, Liabilities, Equity: An Intro to the Accounting Equation](#)

# BUILD-OUT



# Facility Build-Out

There are several ways to build an affiliate. However, many considerations can assist in creating a more organized and structured environment. For example, having a front desk in the back of the gym is not effective. Having your main phone near the speaker may be a distraction and cause for a poor phone experience. This may all seem rudimentary, but with so many moving parts, it's easy to get lost in the design and details. Use this section to check off the high-level areas so you can spend time focusing on the function and flow of your facility.

One thing to note on design, function, and flow is that many equipment providers out there have assistance in layout assembly, either on their website or through a direct service. Use this service so you can visualize how everything would appear and/or fit within your space. Another option is to use painters tape to measure out where larger, more robust equipment would sit.

Here are some things to consider as you go through the process.

- **Have your budget front and center, as this will indicate where and how to proceed from a financial standpoint. [ >>>Jump Back: Business Plan ]**
- **Cost calculators [ >>>Jump to: Financial Calculator ]**
  - Understand how the costs of a build-out, from equipment to fixed expenses, will dictate your overall ability to spend and where the money has the most impact. If you have a limited budget and space, six rowers may be a good start for your class size as opposed to 12 rowers. You can expand to 12 rowers over time. This frees up cash flow for investing in other areas of your build-out. Be conservative with your equipment list, as you can always purchase more and cash on hand will be very important in the early stages.
  - Use your numbers from the financial calculator to have a clear understanding of the total budget for equipment and how it's impacted by new member growth. This allows for a stronger forecast of continued equipment purchasing as your revenue grows.
- **General Layout**
  - Member Flow
    - Be sure to consider space around the pull-up rigs and other larger immobile equipment. Barbells take up an 8-by-6-foot area for safe surroundings while in use. When placing fixed equipment on either side, you will want to be sure there is proper clearance to perform movements and access other parts of the gym.
    - The front desk area is generally best placed at the front of the location or near the main entrance. It's the first and last place you'll have to communicate with members.
  - Bathrooms
    - Doors for spaces with bathrooms and showers should open and close without exposing anyone inside. This is a simple detail that can get overlooked. If these spaces are single-use, a simple note on the door to courtesy knock before opening and a reminder on the interior to lock the door are easy ways to assist.

## – Single-floor and multi-floor spaces

- Single studio
  - Single-floor spaces and studios can help limit costs by requiring less staff to manage. However, these spaces do have an impact on the number of members you can have per hour on a floor at any given time. Instead of a 15,000-square-foot training floor, you may find it more beneficial to have two smaller training floors operating two classes during overlapping hours.
- Multi-floor spaces
  - For future growth and options, a two-floor model can provide a lot of opportunities. This is something you will want to map and plan in the early phases of setting your goals as an affiliate owner.
- Whether you choose a single- or multi-floor model, take into consideration the sound issues from music, the front desk, and phones when designing the physical layout of your space. We have many floor plans from affiliates available in our resource center to give you ideas.

Playbook Resource Center:  
**Floor Plans**

# PARTNERSHIPS





# PARTNERSHIP AGREEMENTS

So you want to go into business with someone. Maybe your potential partner is a family member, longtime friend, investor, or business associate. Whatever the relationship, the start of a partnership is much like the beginning of a romantic relationship. Everyone is euphoric, and nothing could go amiss. Time for a strong dose of reality.

Just as every personal relationship has its ups and downs, so do business partnerships. We recommend you enter into a partnership agreement to protect yourself and your business.

Here are some of the common elements to think about and include in a partnership agreement, which must be in writing and signed by all partners. This is not meant to be an exhaustive list, so consult a professional if possible.

## Percentage of Ownership/Capital vs. In-Kind (aka "Sweat Equity) Contribution

You should have a record of how much each partner is contributing to the partnership prior to its opening. Typically, these contributions are used as the basis for the ownership percentage, but this is not a cut-and-dry formula. For example, one partner may put in a considerable amount of cash with no plans to work in the business, and a second partner may not invest cash but will provide the sweat equity to make the business a success.

As such, the partner who works the business full time may get a larger percentage or vice versa. You should also address what will happen if that initial influx of money is not enough to carry you through to profit. What will happen if the business needs more money? Will you close your doors? Seek outside investment or have the owners put in more money themselves? It is always good to plan for the worst-case scenario ahead of time. Also, if one partner provides the money and another is a workhorse, it is good to make this clear on paper so everyone understands what they are getting into.

## Allocation of Profits and Losses

You must decide if the profits and losses will be allocated in proportion to a partner's ownership interest, which is the way profits and losses are handled unless otherwise indicated. Will partners be permitted to take draws? A draw is an allocation of profits from the business prior to the actual distribution among all partners. We recommend that you and your partner or partners make these decisions in advance.

## Who Can Bind the Partnership?

Generally speaking, any partner can bind the partnership without consent from the other partners. Imagine if your partner signed a contract for a private jet timeshare without your knowledge. That's certainly something most small businesses can't afford, and such a liability could be a significant risk to the financial stability of your business. Clarify what type of consent a partner must obtain before they can obligate your company.

## Making Decisions

Making decisions in a business with a partner can be arduous and unproductive. It could even lead to a company stalemate and result in business failure. Therefore, you need to establish a decision-making process in advance so your business operations can move along smoothly.

## **The Death of a Partner and Dissolution**

What happens if one partner is deceased or wants to leave the partnership? To manage these situations, you need a buy/sell agreement. This establishes a method by which the partnership interest can be valued and the interest purchased by either the partnership or individual partners.

What about dissolution? Figure out from the start what will happen if one of the partners doesn't want to be involved anymore. Think ahead to a time when you and your partner(s) may not be in agreement about the business. That is not the time to start arguing about exit strategies. The time to figure out exit strategies is at the beginning when everyone is working to make the business take shape.

## **Resolving Disputes**

What happens if you and your partner(s) reach a point where you can't agree? Do you head to court? Only if you want to spend a lot of time and money.

We recommend you include a mediation clause in your partnership agreement to provide a procedure by which you can resolve major conflicts. These are some of the key elements that a partnership agreement should include. You and your partner(s) should schedule time to talk about these issues, but it is best to go to a legal professional who can draft the agreement for you. An attorney can help advise you and make sure you have thought about and covered all the necessary elements so you can manage, protect, and grow your business venture.

# TIPS FOR PREVENTING A BROKEN PARTNERSHIP

## Create a Shared Vision and Mission

As in any business, it's critical for partners to define and agree on the vision and mission of the venture as the very first step. If you aren't moving in the same direction, problems are bound to arise. The motives for each partner can be different, but the overall objectives and methods will more than likely be the same.

Set aside time to discuss the company's vision and mission with all partners. Dig deeper by asking each other questions. Examples: What motivates you? What would your ideal business look like?

*Tip: Put the vision or mission statement in writing and continue to use it as a guide as you make decisions.*

▶▶▶ [Jump Back: Core Values, Mission Statement, & Vision Statement](#) 💎

## Addressing Expectations

Each person in the partnership has their own reasons for being in the partnership. Sometimes people seek a partner for capital, sometimes for expertise, sometimes for connections. These motivations are not always expressed, but they remain an underlying expectation. If the expectation isn't met, the relationship can become strained. Because each person's expertise, motivation, and personality are different, have this discussion before anything is committed contractually. Because individual needs and expectations may change over time, a clear dissolution or modification plan needs to be in writing also.

**ACTION ITEM:** Have a conversation with your partner(s) about expectations. Find out what your partner expects from you in the partnership and share your expectations of them as well.

**ACTION ITEM:** Make sure your partnership agreement includes provisions for how to dissolve or modify the partnership.

## Identify and Utilize Strengths

Because partners join forces for a variety of reasons, sometimes the strengths of each individual may be overlooked. The most obvious strengths will probably be recognized. However, underlying strengths can often make a big difference with regard to long-term motivation, commitment, and success.

**ACTION ITEM:** Make note of your personal strengths and ask your partner(s) to do the same. Then sit together and discuss how you can apply these to the business.

## Support the Partnership's Limitations

In an effort to save money, little things often pile up in areas where both partners have neither expertise nor interest. Over time, these can sink your business. Limitations can occur in any area: strategy, product/service development, marketing and sales, personnel and operations management, financial management, or administrative duties. Wherever these limitations are, identify them as early as possible and have a plan to manage them so things don't get out of hand.

**ACTION ITEM:** Have a conversation with your partner(s) about each of your weak points and be honest about what you are not good at. Ask your partner(s) to do the same. Create a plan for how you'll address critical business areas where you share a weakness.

**ACTION ITEM:** Take a step back to evaluate your business performance each quarter and identify problem areas that are hurting your gym (likely areas where you and your partner(s) have a shared weakness). Chances are these are areas that could benefit from some extra support. If you think you can't afford it, think again. You can't afford not to address limitations. These gaps are where the value of the business slips away little by little. Don't let it happen at your affiliate.

## Set Company and Individual Goals

The ideal way for partners to approach goals is to start with goals for the company then create goals for themselves. Individual goals should support the company goals. Goals should be specific and measurable. Writing these is especially important for partners.

**ACTION ITEM:** Review and update your affiliate goals with your partner(s). Then get each partner to set individual goals that support the company goals in each partner's area of expertise. Put all these in writing and get each to commit to their goals. There will be no question about who's accountable for what.

**ACTION ITEM:** Set aside time in advance to commit to reviewing progress toward your goals together.

## Handle Disagreements Early

As in any type of partnership, disagreements will happen. Handling partnership disagreements effectively is the key to keeping the relationship on an even keel and the partnership in good order. Don't let bad feelings build and fester over time. Make it a rule that each partner can approach the other when something needs to be addressed.

**ACTION ITEM:** Make sure you have a regularly scheduled meeting with your partner(s). In some situations, once a week is needed, but once a month allows everyone to come with an agenda. Sometimes it's difficult to approach a partner, especially if it's a longstanding relationship that has deteriorated. Scheduled conversations can help. It's always best to frame feedback around your common goals of building a successful business and to stay positive. Present a plan for change that gives everyone something to respond to.

## Define Roles for Each Partner

Do you and your partner have written job roles? If not, you may be operating under false assumptions. Job roles convey what someone is responsible for with a list of tasks and outcomes. Lack of clarity around job roles is a major source of frustration and disappointment in many partnerships.

**ACTION ITEM:** Write down the details of your own role and ask each partner to do the same, ensuring the document covers the specific tasks and outcomes you are each responsible for. Discuss and agree on these.

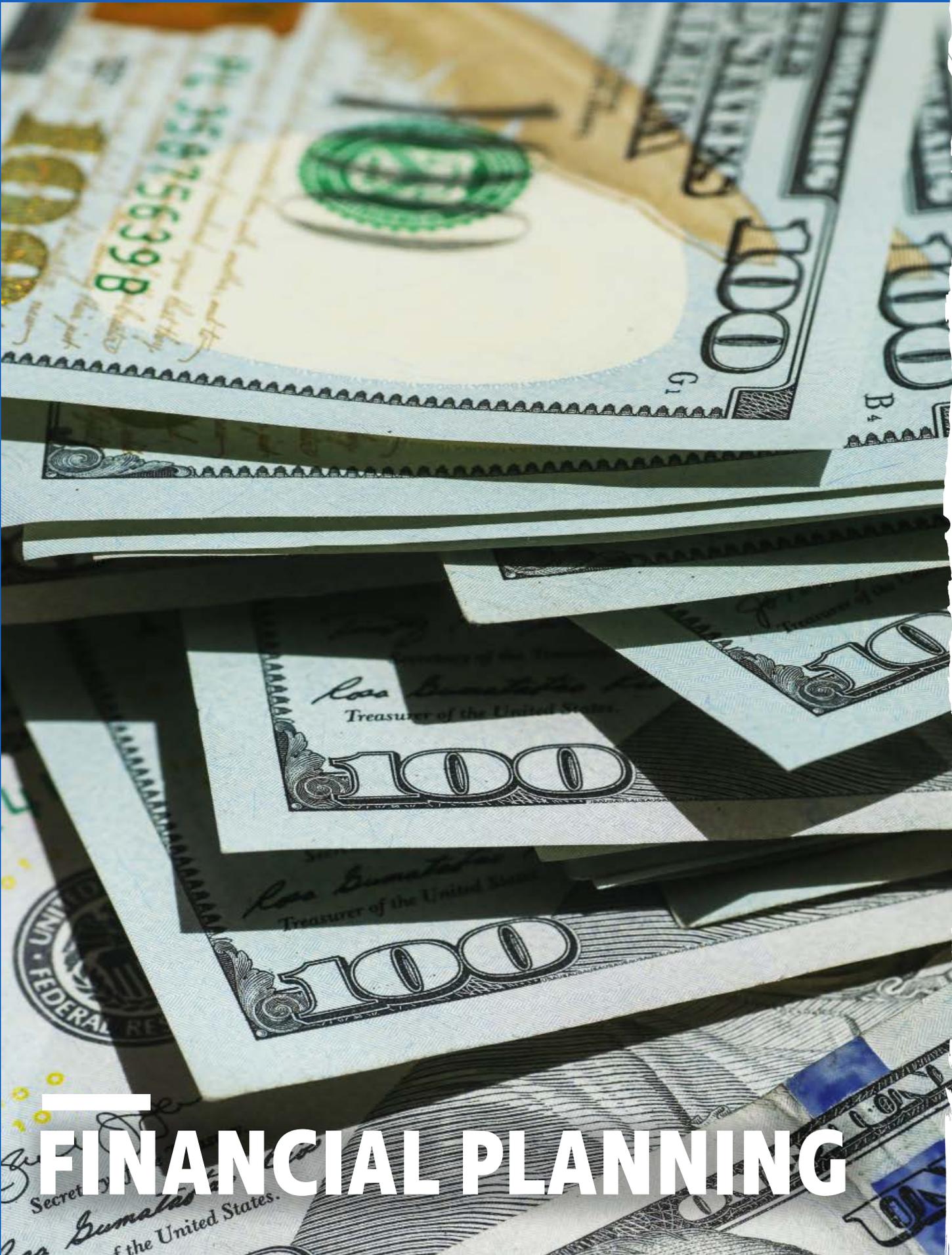
**ACTION ITEM:** Look across all the job roles and identify uncovered tasks. Contract for or hire a specialist in these areas. The objective is to make sure all jobs are covered and accountability has been assigned and acknowledged.

**ACTION ITEM:** Use these job role documents as a tool for staying accountable to yourselves, to each other, and to the affiliate. Review them at regular intervals together.

If you can follow these simple tips, you'll have a solid foundation for a successful partnership and a strong and profitable business.

Playbook Resource Center:  
**Sample Partnership Agreements**

Partnership Agreements



# FINANCIAL PLANNING

# Tips for Easy Financial Planning

We've created a simple system for forecasting the potential revenue at your gym as well as mapping your preferred take-home pay. Following these steps will help you stay grounded in realistic goals as you plan for growth and personal earnings.

*Here's how it works:*

## STEP 1: Calculating Membership to Break Even

### Financial Calculator

- 01 Project your operating expenses. Think about what it's going to cost you to run your gym, and err on the conservative side.
  - *Example: \$100,000 / year total cost to operate your location. This includes ALL expenses and costs.*
- 02 Choose your membership fees. Look at what the market rate is in your area. Assuming you can charge double what the market average is may not be impossible, but it would require more thought and strategy as you figure out how to frame that message to potential members. Explaining why they should pay two times more for your services can be difficult, especially at the start-up phase of your business.
  - *Example: \$125 / month for unlimited members or \$1,500 / year for members who pay in full*
- 03 Calculate how many members you would need to cover your operating expenses and round up 10 percent to be safe. Remember, this is the bare minimum just to break even on the operations of your facility.
  - *Example: \$100,000 in annual operating expense / \$1,500 annual membership fee = 67 members needed to break even. 67 x 110% (buffer) = 73 members*

## STEP 2: Check Your Membership Potential

- 01 What are the realistic prime hours of the day for your location? Be honest about the nature of your location and your membership base. Assume you'll be able to hold one class during each of those hours unless the size and layout of your space can warrant more.
  - *Example: 7 class hours per weekday*
- 02 How many people can you host per class? Think about your size constraints. One rule of thumb is to have 75-100 square feet of usable space per member. Remember, this is your maximum capacity per class, so scale down accordingly to make sure the classes are small enough to deliver the value you are promising.
  - *Example: If your facility includes 2,500 square feet of usable training floor space, that equates to 25-33 members at max capacity. Scaled down 25% to create a buffer, that equates to 18-25 members.*
- 03 Now you have what you need to calculate your max capacity for members per class. Check to make sure this number is greater than the number of members you need to break even.

- *Example: Looking back at your break-even membership of 73 and assuming a member visits four times per week, let's find out if your space is large enough.*

*73 members x 4 visits per week / 5 full days per week = 59 visits per day*

*Now that you have your average of 59 visits per day, you can approximate how many classes you need while maintaining fewer than 18 members per class.*

*59 visits / 5 classes per day\* = 12 members per class*

*\*5 classes per day is the minimum you'll need to break even.*

*Fantastic! You have plenty of space per member in your class given your current operating expenses. Also, take into consideration that not every hour of the day will be popular to your community. You may need to impose a limit on the number of members who can attend classes held during the more highly attended hours, which may affect your calculations.*

### STEP 3: Build in Your Take-Home Pay

- 01** How much money do you want to be able to take home every year? Now that we know you are breaking even based on your operating costs, let's calculate how many additional members are required to hit your take-home pay. For this example, we'll use a minimum viable amount to comfortably stay in business and build a career.

- *Example: \$50,000 take-home pay*

- 02** How many members do you need above your break-even amount to cover your take-home pay?

- *Example: \$50,000 / \$1,500 annual membership fee = 33 additional members*  
*73 break-even membership + 33 additional members = 107 total members*

- 03** Can you accommodate this new level of membership in your location? Repeat step 2 to find out.

- *107 members x 4 visits per week / 5 full days per week = 86 visits per day*

*86 visits / 5 classes per day = 17 members per class*

*The answer is yes! You can accommodate this number of members, but be cautious of specific classes nearing your maximum capacity.*

### STEP 4: Rainy Day Fund

You cannot predict the future. Unexpected expenses and events happen, and your business needs to be able to handle any eventualities that might come up.

Having a separate checking account for a rainy day fund can help business owners keep cash on hand and available as circumstances arise. Many affiliate owners, reluctant to worry about managing another bank account, have simplified the process by setting up an automatic monthly transfer from their main account to their rainy day account. As you grow you can increase and/or decrease the amount transferred each month. A line of credit can provide another way of having financial resources as needs arise. In any case, having \$10,000 to \$20,000 of available emergency funds is recommended and encouraged.

# Building a Class Schedule

When building a class schedule, the operator needs to think about the opportunity cost of each class. Opportunity cost is the benefit forgone for making a decision. In the case of a CrossFit affiliate, this is the trade-off between paying coaches to work a non-prime hour or specialty class and the potential members the gym could obtain with those hours.

CrossFit is a mixed-modal sport that requires intensive skill development across Olympic weightlifting, gymnastics, endurance sports, and more. However, when opening an affiliate, the owner needs to think about their current membership base and grow their offerings with their members.

## Examples of specialty classes that a gym may consider:

- Olympic lifting
- Gymnastics
- CrossFit Kids
- 60+/Masters
- Open gym
- Endurance
- Mobility

## Sample Schedule

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
BOOT CAMP 6 - 7am	CROSSFIT 6 - 7am	BOOT CAMP 6 - 7am	CROSSFIT 6 - 7am	BOOT CAMP 6 - 7am		
CROSSFIT 7 - 8am	CROSSFIT 7 - 8am	CROSSFIT 7 - 8am	CROSSFIT 7 - 8am	OPEN GYM 7 - 8am		
	CROSSFIT 8 - 9am	CROSSFIT FREE TRIAL 8 - 9am	CROSSFIT 8 - 9am	OPEN GYM 8 - 9am		OPEN GYM 8 - 9am
					CROSSFIT 9 - 10am	OPEN GYM 9 - 10am
					CROSSFIT 10 - 11am	OPEN GYM 10 - 11am
CROSSFIT 4 - 5pm	CROSSFIT 4 - 5pm	CROSSFIT 4 - 5pm	CROSSFIT 4 - 5pm	OPEN GYM 4 - 5pm		
CROSSFIT 5 - 6pm	CROSSFIT 5 - 6pm	CROSSFIT 5 - 6pm	CROSSFIT 5 - 6pm	OPEN GYM 5 - 6pm		
CROSSFIT 6 - 7pm	CROSSFIT 6 - 7pm	CROSSFIT 6 - 7pm	CROSSFIT 6 - 7pm	OPEN GYM 6 - 7pm		
POWER HOUR 7 - 8pm	MOBILITY 7 - 8pm	POWER HOUR 7 - 8pm	CROSSFIT FREE TRIAL 7 - 8pm			

Playbook Resource Center:  
Sample Schedules

# How Class Schedule Impacts Your Financial Model

When developing your class schedule, you can return to your [financial model](#), which helped you identify the max number of members appropriate per class and the respective class spots per week.

Though it would be most profitable to run the least number of classes possible, we can use these simple calculations to see approximately how many additional spots we need to not only break even but also make our expected take-home dollars.

## »» Class Break-Even Calculator

### Step 1: Determine Monthly Rate and Class Count

Using the same assumptions from your financial model, put target numbers for your monthly membership cost, classes per day, and average visits. This will calculate how much each member pays per class they attend.

### Step 2: Determine Operating Costs per Class

Add the number of coaches and additional employees required to be at the gym to run the class and their respective rates. Include any additional expenses you may incur as a result of implementing the class as well. This could include cleaning supplies, electricity, or security for open gym. These calculations will indicate approximately what you need to break even on each and every class you run.

### Step 3: Determine Break-Even Per Class

After inputting the details from steps 1 and 2, you will see the break-even point of customers per class. This means if you do not increase your monthly membership count by that break-even number, you will be spending more to operate your business than you will be receiving for adding that new class.

## Considerations

When developing your class schedule, think about the ideal target market your affiliate will serve. Is your market in a corporate city market, suburban family home, or another type of market?

*Here are two high-level examples to show the difference specific markets can have on your scheduling:*

## Corporate City Market

### Pros

- High population density
- Coincides with members with higher disposable incomes
- Large early-morning (5, 6, and 7 a.m.) and late-afternoon classes (5, 6, and 7 p.m.)

### Cons

- Cities are typically more competitive markets with more options
- Smaller midday classes (10 a.m., 12 p.m., and 4 p.m.)
- Coincides with more expensive rent per square foot
- May require additional changing rooms and showers to accommodate working out before work

## Suburban Family Home

### Pros

- Lower population density can reduce number of direct competition
- Coincides with cheaper rent per square foot
- May not require as many additional amenities
- Larger mid-morning and early-afternoon classes (8, 10 a.m., 12, 3, and 4 p.m.)

### Cons

- Convenience of location is paramount to new customer acquisition
- Disposable income in suburban neighborhoods is variable
- Smaller early-morning (5 and 6 a.m.) and late-afternoon (6 and 7 p.m.) classes

## Takeaways

It will take time and careful thought to develop the right class schedule for your affiliate, but if done correctly, you will be able to offer a schedule that provides each customer with ample time slots without adding class times that are not profitable. Always err on the side of caution when adding new classes to your schedule, and survey your current members before committing to changes.

# Pricing Models

Pricing models will be affected by your financial model. Use the financial calculator to work through the minimum amount you need to charge for a monthly membership. This will impact how you charge for all other packages and discounts and shed light on what your base pricing needs to be.

## Membership Package Option

### *Class Packs*

- 5-, 10-, or 50-class packs - Going larger in the prepaid classes can assist in generating income up front but generally requires a large discount to incentivize the sale. This can grossly impact your membership value.

### *Unlimited Memberships*

- This is the standard baseline for membership at your affiliate, assuming all classes and offerings are available. This single monthly payment would give members access to all the classes on your schedule. Convenience can be a huge selling point to consider.

### *Two to Three Times per Week or 10 Classes per Month*

- This is a good way to attract members who may have scheduling issues and creates conversation when and if they miss classes for any reason. Limit the number of hurdles you and the members have to manage.

### *Military, Student, and Family Discounts*

- Offering these is a personal choice. Many affiliate models have shown success in offering or not offering any of these options. Discounts for special cases can be good for the community.

One thing to consider when building out your membership packages: The more options you offer, the more difficult your memberships can be to manage and track. Generally in sales conversions, it's best to stay with no more than three main options for the potential new member to choose from.

## Business Financial Health Assessment

Knowing your numbers is a critical part of understanding where your business is and where it is most likely headed. To help you better understand which metrics to focus on and how to calculate them, we have listed out the foundational ones that we will all come across in our affiliate journey.

▶▶ [Jump Back: Sales Forecast](#) 💎

Let's take a look at other data sets that are key to having a strong understanding of the current state of financial health in your affiliate.

## Performance Metrics

### *Revenue (R)*

Revenue is the total amount of money earned by your gym during a specific period. You can examine revenue daily, weekly, monthly, quarterly, or yearly. Beyond just noticing this total, it's helpful to use it to compare business performance from one period to the next. Doing so will help you spot trends and project future revenue.

### *Expenses (E)*

Your expenses consist of all bills and charges your gym incurs for a specific period. This total includes the cost of overhead, supplies, retail sold, equipment, and labor. As with your revenue, having a good grasp of your expenses allows you to spot trends and make corrections or predictions about future financial performance.

### *Net Profit (NP = R-E)*

Your net profit is the difference between your revenue and expenses.

### *Gross Margins (GM = (R-E) / R)*

Your gross margin tells you what percent of income your gym retains per period. To calculate, take your net income and divide by your revenue. Higher margins are clearly better, and you can adjust your margins by reducing or increasing expenses.

## Member Acquisition Metrics

### *Gross New Members*

Gross new members are the total of all new members for a specific period.

### *Members Lost*

With new member gains come natural attrition. Your members lost number is the total of all lost members for a specific period.

***Net New Members (NNM = Gross New Members – Members Lost)***

The net new member number is the difference between all your members gained and your members lost for a specific period.

***Member Churn Rate (C = members lost per period / members at beginning of period X 100)***

To calculate your member churn rate, select a specific period and divide your number of lost members by the number of members at the start of the period. Then multiply by 100 for the percentage that represents your member churn.

A healthy churn rate is around the 2-percent range per month. If your churn rate is regularly higher, you should start asking questions to pinpoint the reason. High churn rates generally indicate an unhealthy business.

***Cost of Acquisition (CAC = total marketing costs / number of new members in that period)***

It's important to know how much you spend to bring in a new gym member. To calculate your cost of acquisition, select a specific period and divide the total costs associated with member acquisition by the total new members in that period.

***Lead Conversion Rate (LCR = gross new members / number of leads X 100)***

It's also important to know if your leads are converted at a good rate. If they aren't, you can make changes to your sales process or marketing to improve your conversion rate.

To calculate your lead conversion rate, you need to define the period you want to examine and then divide the gross number of new members by the number of leads for the period. Then multiply that number by 100 to find your percent.

***New Member Referral Rate (RR = number of members from referrals / total number of members X 100)***

With a good referral program in place, you should receive plenty of new members from referrals. To check to see how your gym is doing with referrals, you can look at your referral rate. Start by selecting the period you will examine and then divide the number of new members gained from referrals by the total number of members you had for that period. Multiply your number by 100 to convert it to a percent and you have your referral rate. A healthy referral rate averages around 25 percent.

## **Member Behavior Metrics**

***Attendance per Member (A = actual members in class / class capacity x 100)***

You can look at attendance from the standpoint of individual members and their average attendance or as a ratio of class attendance to capacity.

For attendance compared to capacity, divide the number of members in attendance by the available spots in the class. Then multiply that number by 100 for the percentage.

If you examine attendance per person per week, you want a rate of two or more visits per week.

**Member Lifetime (MLT = 1 / member churn)**

How long do your members typically stay with your gym? Your member lifetime metric will give you retention insight.

Divide the number one by your member churn rate and you'll have your average member lifetime. If you haven't calculated your member churn rate, you'll need to do that first.

**Average Revenue per Member (ARPM = total revenue / total number of members)**

Looking at revenue per member tells you how much each member is worth to you from a financial perspective. Once you know, it's good to compare that number with the CAC (customer acquisition cost).

To find your average revenue per member, take your total revenue for a specific period and divide that by the total number of members you had in the period.

**Lifetime Value per Member (LTV = cost of membership x member lifetime)**

Looking at the lifetime value of your members is a fun way to project the growth of your gym and revenue.

You first will need to calculate your member lifetime to figure out your lifetime value. Once you have your average member lifetime, you just multiply that with the cost of your average gym membership. The number you come up with is your average member lifetime value.

▶▶ [Gym Health Assessment Calculator](#)

# Financial Planning Worksheet

Use this worksheet for reference or plug in the numbers for your own business.

## Step 1: Calculating Break-Even Membership

Operating Expenses		◀ Estimate this number or use the next tab for help calculating it
Monthly Membership Fee		
Minimum Number of Members to Break Even		

## Step 2: Check Your Membership Potential

Prime Hours/Week		
Classes/Hour		
Usable Sq. Ft./Class		
True Max Students/Class		
Desired Max Students/Class		
Class Spots/Week		
Avg. Member Visits/Week		
Class Spots Needed to Accommodate Break-Even Membership		◀ This must be less than your class spots/week. If not, you need to charge more per month to decrease this cell.

## Step 3: Build in Your Take-Home Pay

Desired Take-Home		
Members Needed to Cover Take-Home		
New Membership Minimum		
Class Spots Needed for New Membership Minimum		◀ This must be less than your class spots/week. If not, then you need to increase membership costs, expand floor space or "prime hours," or move/close.

# Know Your Expenses

Enter your estimated expenses for each of the line items below. Please enter monthly expenses unless otherwise noted.

PAYROLL	EXPENSE
General Manager	
Coaches	
Front Desk	
Bonuses	
Payroll Taxes	
Workers' Comp Insurance	
Liability Insurance	
Employee Benefits	
Reimbursements	
Continuing Education	
<b>CONTRACTOR EXPENSES</b>	
Design	
IT	
Accounting	
Legal	
Maintenance & Cleaning	
Marketing	
<b>PHYSICAL SPACE</b>	
Lease	
Utilities	
Maintenance	
Cleaning	
Supplies	
Fit-up Investments & Improvements	
Equipment	
Parking	
<b>MISCELLANEOUS</b>	
Software	
Charitable Contributions	
Bank Charges	
Affiliate Fee (Annual)	
Interest Payment on Debt	
Taxes	
Payroll Fee	
Other	
<b>MARKETING</b>	
Ad Spend	
Marketing & PR Services	
Community Events	
Merchandise Production	
Collateral Production	
<b>TOTAL MONTHLY EXPENSES</b>	
<b>TOTAL ANNUAL EXPENSES</b>	

## Sample Balance Sheet

Assets		Liabilities & Equity	
<i>Current Assets</i>		<i>Liabilities</i>	
Checking Account	5,000	<i>Current Liabilities</i>	
Savings Account	1,000	Accounts Payable	12,000
Petty Cash	500	Line of Credit	20,000
Accounts Receivable	22,000	Payroll Liabilities	7,000
Inventory	15,000	<b>Total Current Liabilities:</b>	<b>39,000</b>
Prepaid Insurance	6,000	<i>Non-Current Liabilities</i>	
<b>Total Current Assets:</b>	<b>49,500</b>	Long-term Debt (loan)	48,000
<i>Non-Current Assets</i>		<b>Total Liabilities:</b>	<b>87,000</b>
Accumulated Depreciation	-4,500	<i>Equity</i>	
Computer, Office Equipment	7,000	Owner's Capital	35,000
Building	65,000	Retained Earnings	55,000
Land	60,000	<b>Total Equity:</b>	<b>90,000</b>
<b>Total Non-Current Assets:</b>	<b>127,500</b>	<b>Total Liabilities &amp; Equity</b>	<b>177,000</b>
<b>Total Assets</b>	<b>177,000</b>		

## Balance Sheet Explained

Here is a useful [article](#) on how to break down and better understand a balance sheet for your business.

# Risk Checklist

- Risk Checklist/Risk Assessment
  - [Business Risk Assessment](#)
  - [Sample Risk Assessment Checklist](#)
  - Risk Adversity
    - Risk Assessment
      - Financials - Can my affiliate make money and when?
      - Volatility - The marketplace, the industry, employees. Create an itemized list of key items and a checklist.
  - Protecting your assets
    - Personal – Keyman insurance, casualty and liability, harassment, etc. This will link back to employment and workplace agreements.
    - Company – Corp. insurance



# GENERAL OPERATIONS



# Daily Operations

You will see many roles and responsibilities mentioned throughout this section. Note that every business model is different, and many of these positions may be filled by the affiliate owner. That is a standard position to be in.

The hope in this section is to help you figure out how to best manage these roles and responsibilities. Once you have a strong handle on the different roles, you can begin to map out where, when, and how best to delegate and alleviate the stress of wearing so many hats.

Playbook Resource Center:  
Daily Operations Resources

## Details Matter

When Disneyland closes for the evening, 1,500 workers descend upon the park armed with refueling trucks, repair kits, pest control gear, cleaning equipment, and paint. Every single night, something gets repainted. And when a new crop of families arrive the next morning, the park is sleek and shiny once again.

In your gym, little details — a frayed resistance band, crooked sign, or scuffed wall — might be easy for staff to brush off and may even go unnoticed by most members. But these things could alter the member experience on a subliminal level. These details show how much you care about your gym.

That's why hiring detail-oriented staff and teaching them your core values and mission are essential for any affiliate owner.

*Here are some examples of what this might look like at the gym:*

- Paint colors are listed in branding guidelines. Managers are expected to oversee repainting and touch-ups throughout the gym at least once a month. This can be incentivized with meals or bonus pay. This shouldn't be looked at as a favor. Services provided get paid for. Favors are the most expensive work there is.
- Your location should have a maintenance contact sheet that lists a plumber, locksmith, handyman, exterminator, and other key contacts needed in general maintenance and in case of emergency. The minute a toilet overflows or a door hinge breaks, your team knows who to call to get it handled. It shouldn't linger for days on end, as that delay or lack of detail can quickly rub off on your team and members. Lead by example.
- You might employ a part-time employee for light maintenance tasks, such as hanging frames or reorganizing fitness equipment.
- Front desk staff and cleaning staff team up to execute deep cleans of the gym at least twice a month. This includes vacuuming behind shelves, scrubbing walls and rigs, and polishing the floors. Again, this is on the clock and paid for, whether hourly or as part of their salaried tasks.

## General Operations: Tips and Best Practices

**Scheduling.** A week in the life of an owner or manager can be incredibly hectic, but one way to stabilize your schedule is to do certain things at the same time every week. For example, take inventory and order merchandise on Mondays, run financial reports and pay bills on Fridays, process membership requests on Tuesdays and Thursdays.

**In Person.** The more face-to-face time you can log with your staff and members the better. Aim to have an all-hands meeting at least once a month. When conflicts and disputes inevitably occur, whether they are between staff or members, it may be tempting to stay on the sidelines and hope things work themselves out. But a frank conversation among all parties involved is the quickest and surest path to resolution. The same goes for disciplining a staff member for breaking gym policy.

**Professionalism.** A gym is a more casual work environment than many other businesses — the music is loud, endorphins are high, and everyone is sweaty. However, if things are too casual, staff members may not take their job seriously, members may not receive a quality product, and your business could suffer. As an owner/operator, you have the opportunity to set a tone of professionalism whenever you set foot in your facility. This could look differently depending on the culture of your affiliate but can include things like branded attire, respectful verbal and body language, and a limit to how much your personal life intersects with your business.

## Front Desk Operations: Tips and Best Practices

**Communication.** If multiple people perform front desk tasks at your affiliate, a major pain point can be smooth communication.

How do you make sure member requests, cleaning/maintenance tasks, and other daily duties get passed on to the next shift? Seamless communication starts with clear protocols for how information is shared within your company (e.g., Slack, Google doc, or email). You might choose to have a series of protocols for various situations. For example, text/call for urgent matters (e.g., coverage for a sick staff member), email for long-term projects, and Slack for daily updates.

**Empowerment.** Front desk staff are invaluable to the health of your business if given the opportunity. Some ideas for elevating the role of your front desk staff within the gym:

- Hold a training seminar
- Assign daily maintenance and cleaning tasks or create a checklist
- Set monthly or quarterly goals and reward the whole team if they are met
- Plan a scavenger hunt of “front desk tasks” during an all-hands team meeting to elevate the perceived value of their contributions within the gym

**Training.** Keep in mind your front desk staff is often the first contact a potential new client speaks to when they enter your affiliate. That’s why it’s essential to make sure they are knowledgeable about all class offerings, membership options, and gym rules and policies. One great way to do this is to build a manual that new staff members complete while they are training for the job. This fill-in-the-blank-style document can cover the following items:

- Types of memberships
- How to complete basic tasks in your customer management system (sell memberships, sell retail, add a new client, sign a waiver, etc.)
- How to open and close the gym
- Explanations of various class offerings

You may also find it helpful to role play with staff members in training to evaluate their responses to various common questions from customers. What is CrossFit? How can I safely participate in classes? What's the best membership option if I want to come in three times a week?

## Reporting

Knowing your numbers is vital when operating your own business. Without monitoring your numbers, you can easily lose control of your finances and financial stability. Perform regular assessments of finances, membership, and attendance to ensure you're adequately using your resources to serve your members' needs and maximize profits.

Here's a breakdown of different reports that may be useful. Choosing at least one that best fits your operational and affiliate model is a great start. The goal is to have a system in which you can track and manage key points of your business while wearing the many hats you do.

### Daily

- A daily report provides an overview of daily operations at the gym.
- A front desk daily report allows the front desk staff to communicate with one another. This can be as simple as a living Google document where key notes are added throughout the day, listing any member issues, service and maintenance notes, or other notable events.

### Weekly

- Weekly manager reports provide a detailed overview of operations, attendance, finances, marketing, and other ongoing projects.
- Weekly membership reports provide a detailed overview of sign-ups, prospects, holds, cancellations, and total membership.

### Monthly or Quarterly

- New member tracking reports track new sign-ups and prospects.
- Monthly profit and loss statements provide a financial overview of your affiliate.
- Quarterly attendance reports allow leadership to assess whether any class times should be added, removed, or modified.





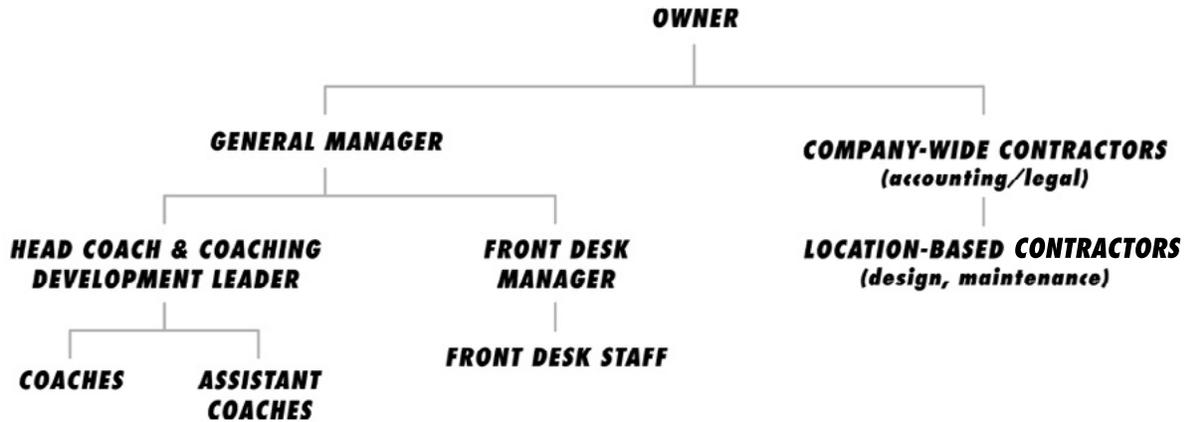
# STAFFING

# STAFFING

## Organizational Structure

It's important that everyone in your community — you, your employees, even your members — understand who's responsible for what. Be clear on the reporting structure, and empower your staff to hold each other accountable for their work.

### Sample Org. Structure



Use the space below to build your own organizational structure:

# Roles & Responsibilities

Job roles are heavily dependent on your organizational chart, the size of your gym, and who you can hire. In the beginning, many owners will assume all these responsibilities, but over time you may be able to hire more staff and delegate roles and responsibilities to others.

Below are examples of some roles and responsibilities. While you can use this as an example, some of these roles may be combined into one or two positions or divided into several. Use these as a guide while hiring. A great exercise is to make a list of every general task needed on a daily, weekly, and monthly basis. Then assign the tasks to the role that best fits.

## Owner/Operator

- Uphold core values, standards, and operational policies.
- Act as a brand ambassador in and out of the gym.
- Be prepared to step in, replace, and take initiative any time a coach, manager, or assistant is needed. The final responsibility in every area that needs to be completed or maintained properly lies with you.
- Provide order and organization in the day-to-day operations within the doors of the gym.
- Lead monthly staff meetings in an established format, including a game or team-building exercise, conversations about core values, group discussions about gym policies/issues/expectations, and announcements about upcoming events.
- Hire, train, and manage coaching staff. Conduct reviews for new staff members, evaluating performance and discussing areas for improvement.
- Conduct annual reviews for all staff, setting goals and discussing development and career trajectory.
- Take disciplinary action with staff when necessary (write-ups, reduction of hours, etc.).
- Oversee front desk staff. Perform regular check-ins to ensure that any and all personnel issues are handled in a professional manner, communication channels are open, and front desk meetings are being regularly conducted.
- Maintain overall aesthetics of the gym, including management of cleaning and maintenance staff.
- Provide weekly and/or daily announcements to staff.
- Make sure daily programming is available for coaches/assistants.
- Manage class schedule and general coaching schedule.
- Oversee and manage retail display.
- Solve customer service issues and respond to all info emails or delegate to the appropriate party.
- Ensure all programs are staying fun, fresh, and purposeful in programming and coaching.
- Manage budget to ensure operational profitability.
- Process payroll for all staff members.
- Social media: daily and weekly updates, pictures, and announcements posted to Facebook, Twitter, Instagram, and website.
- Website: Create content and keep current – blogs, logos, graphics, updates, links, etc.
- Manage partnerships with vendors and local businesses. Always make sure partnerships benefit our members and our community first and foremost.
- Manage and implement any and all events and activities.

# Roles & Responsibilities [cont.]

## Head Coach/Coach

If you hire a head coach, this person can take on management responsibilities such as day-to-day oversight, quality control, and continuing development and instruction for coaches.

- Uphold core values, standards, and operational policies.
- Interview, hire, and train new coaches.
- Coordinate and create a training program and schedule for coaches in training.
- Conduct and/or coordinate monthly coach development meetings focused on improving overall coaching staff so they can deliver a high-quality product and an optimal member experience.
- Conduct ongoing analysis and evaluation of coaching staff.
- Create systems to assist new and current instructors in coach development.
- Stay up to date on new research, training, and rehab information. Attend coaching clinics and camps, watch videos, read books, and seek out tips from elite coaches and athletes.
- Possess an in-depth understanding of the sport from the fundamental skills to advanced tactics and strategies.
- Make sure all coaches provide a simple, structured, and safe environment in which athletes can succeed.
- Greet new members and guests and introduce them to the community.
- Instruct each component of the class.
- Maintain thorough knowledge of proficiency for all functional movements taught in class.
- Motivate members with a positive attitude and enthusiasm.
- Be aware of individual differences among athletes/members. Individualizing communication and motivation to specific people is key to coaching success.
- Pay attention to your members'/athletes' emotions, strengths, and weaknesses.
- Attend monthly staff meetings as well as community and social events.

## Front Desk

- Uphold core values, standards, and operational policies.
- Act as a brand ambassador in and out of the gym.
- Train additional front desk staff.
- Support the day-to-day operations.
- Possess a comprehensive understanding of all programs and offerings, and be able to clearly articulate them to potential and current members.
- Develop an in-depth understanding of the front desk client management system and how to make all relevant account changes and scheduling changes, add new products, pull attendance/membership/financial reports, etc.
- Correspond with members regarding account issues/changes and process as needed.
- Track all memberships and changes.
- Communicate with members on a regular basis.
- Monitor inventory.
- Create purchase orders, place a weekly supplies order, and order specialty items as needed.

- Monitor apparel inventory and alert GM to place new orders as needed.
- Provide respective information for a weekly report to the GM, including a summary of all holds, cancellations, new members, upgrades/downgrades, intro sessions, and total membership numbers.
- Provide GM with timesheets, accounting for each pay period.

## **Independent Contractors**

Your affiliate will benefit from having a team of contractors who can bring specialized skills to the table. Below is a list of some contractors you may choose to work with.

### **Lawyer**

Having a lawyer is especially critical in the early days of the business as you set up your LLC/corp, write partnership agreements, and generally make sure you're building on a sound legal foundation. Look for legal counsel from someone who has generalist knowledge, so as the business grows, whenever you're not sure of something, you can just pick up the phone and give them a call. It's better to be safe than to open yourself up to legal risk by guessing. Depending on your market, expect to pay about \$250 for a 30-minute call.

### **Accountant**

Your accountant's primary responsibility is to take care of your taxes and protect you financially. A great accountant will help you make smart decisions that limit your tax liability, meaning more money stays with you and your business.

### **Bookkeeper**

A bookkeeper can help you enter your transactions into Quickbooks (or your preferred accounting software) so your numbers are in order to deliver to your accountant for tax filings. This person may work on site or remotely and engage with you on a weekly and/or quarterly basis depending on the volume of your transactions. You may choose to do this in-house, but it takes a considerable amount of time and is absolutely critical to get right — it may be more cost effective to use a bookkeeper.

### **Designer**

A graphic designer is essential to developing a strong brand. Using the same graphic designer over time will allow you to create consistency in all your materials, from digital assets to retail items to physical collateral. Strong brands are built on a foundation of consistency.

### **Marketing**

Consider engaging with a marketing consultant only if you have already exhausted all the skills and abilities you and your team members have. It makes sense to seek help if you need to find expertise in specialized areas like digital media advertising. If you hire help, dedicate yourself to learning and being able to bring this back in house if possible.

**IT**

An IT professional will keep your internet up and running, your emails humming, and prevent outages and security breaches on your website. This is a key position to ensure a professional online calling card for your business.

**Maintenance**

Consider having a maintenance person on call to fix equipment like rowers, bikes, or ski ergs when they go down. This equipment has a lot of working parts that often require general maintenance on a monthly to quarterly basis. This is an important relationship for your front desk staff to have so they can call in help when needed and don't need to scramble in an emergency. Also, think about keeping a cadre of maintenance specialists on call, such as AC, HVAC, and pest.

**Cleaning Crew**

Members want to come to a clean gym, period. Consider having a cleaning crew come in four to seven days per week, depending on the size and volume of the location. These contractors should be carefully trained on standards of cleanliness, including frequency of deep cleans, reporting of maintenance issues, etc.

# Employee vs. Independent Contractor

You will likely choose to hire a combination of employees and contractors to meet the needs of your business. It's critical you properly classify each person working with you and meet your obligations under employment law. It is always a good idea to consult with a lawyer about your individual situation.

*\*The IRS has a more detailed explanation of the difference between employees and contractors. We suggest looking into this in your state and fully understanding the difference when you're hiring employees and contractors.*

As part of the choice to bring staff on as employees or contractors, you also face the decision of whether staff should be full time or part time. In short, full-time employment is generally quantified as 30 to 40 hours a week. Part-time employment is usually less than 30 hours weekly. This is also an important area to consult with a local labor professional about. Below, we will take a look at the pros and cons of each employment classification.

\*Employee vs. 1099 Independent Contractor: [IRS - Employee vs. 1099 \(Independent Contractor\)](#)

## Pros & Cons of Independent Contractors

### Pros

#### – Flexibility

This is the greatest advantage of a contractor. You are able to contract them for specific tasks, deliverables, and projects. For example, if you need a graphic designer, you can hire them for their proposed work and responsibilities, forgoing employment taxes that come along with W2 employment. Contractors also give you a bit more freedom to hire on an as-needed basis. This prevents the expense of possible downtime with an employee who may have lessened workload and/or daily responsibilities.

#### – Affordability

Although you may pay more per hour, project, or task for an independent contractor, your overall costs are likely to be less. You don't have to withhold taxes, pay for unemployment and workers compensation insurance, or provide healthcare benefits.

### Cons

#### – Less control

As the name states, independent contractors are just that: independent. While you can set deadlines for deliverables, expectations, and provide project guidelines, you cannot oversee their day-to-day activities or dictate how they get the work done. That would qualify them as an employee. They are expected to work autonomously and are free to set their own hours or schedule.

#### – Less company loyalty

Independent contractors have multiple clients, so you can't assume they will prioritize your business needs (although you can build certain expectations into your contract). There is also the learning curve with each new contracted party or person.

## Pros & Cons of Employees

### Pros

#### – *One unified team*

Bringing on full-time employees can play an important role in building a stronger, more cohesive team. In CrossFit affiliate settings, we know a stronger community means a more successful gym. With employees, you can provide more direction in line with your business goals and hold them to it. Employees also tend to buy in more to your core values and affiliate mission statement.

#### – *Knows the business*

Over time, your affiliate will benefit from your employees getting to know the business and how it best operates. This knowledge can also serve as a motivator for their career-driven goals and make them feel like a more valuable part of the day-to-day operations, which in turn leads to a healthier work environment. This can help ensure your company runs more smoothly and efficiently.

### Cons

#### – *Costs*

Onboarding and continued training of employees require a substantial investment of time and money. In addition to pay, possible benefits, insurance, and taxes, you'll assume the monetary and non-monetary costs for mentoring, training, and managing them.

#### – *Poor fit*

Not every hire is spot on. Sometimes, we miss personality traits that don't fit or mesh well with the rest of the team. When this happens, it's up to you to deal with the repercussions this has on your business resources, staff, and members, including the time and effort it takes to terminate them and hire a replacement. If an independent contractor doesn't pan out, you can simply choose not to work with them again. Termination of an employee has much more stringent legal guidelines that you have to be cognizant of to avoid encountering a liability risk.

Do not cut corners in the hiring process. Be sure to properly classify your employees and contractors to avoid tax and legal complications. Once you've determined whether an independent contractor or employee is a better choice for your needs, you'll need to be certain you stay within the lines of the working relationship. If you improperly classify a worker as an independent contractor, you may be liable for back taxes, wages, and penalties, and could possibly face a lawsuit. If you have any questions, it's best to consult with a lawyer.

# Pros & Cons of Full-Time vs. Part-Time Employees

In general, your coaching staff is going to fall under the employee status for a number of reasons, as laid out in the labor board resources we have provided above. That said, let's take a look at the benefits and/or lack thereof when it comes to full-time vs. part-time employees.

## Full-Time Employees

### Pros

#### – *Productivity*

Full-time employees generally are more productive and proactive. They are likely to be career driven and proud of their work. They will look for ways to hone and enhance their craft.

#### – *Consistency*

With a full-time, set schedule, you can manage the outcome of their work. If they are coaches, you are able to get a sense of the impact they have in class and within the community, monitoring the members' appreciation for their coaching and/or interest in showing up to their class. These are all general signs that will let you know if the job is well done.

#### – *Accountability*

Full-time employees have more investment in their job. Accountability is key for the security of your coaching staff and schedule. Having a coach not show up to a class with members waiting is highly detrimental to your reputation, but that may be less likely to happen with a full-time employee.

#### *Management*

Full-time employees are your best candidates for future management and leadership positions as you grow. You have the most time and resources invested in their training and development. Having a sense of trust in them and their abilities will ease your workload and allow you to focus on other areas.

### Cons

#### – *Costs*

Onboarding, training, and continued education for a properly developed full-time staff will be one of your largest investments. This is something to take into account when budgeting out your financial model and forecasting growth.

#### – *Benefits*

Full-time employees could be incentivized by health and other financial benefits, including bonuses and set term raises. This is obviously more costly.

#### – *Termination*

Full-time employees will be heavily integrated into the fabric of your business, so when one needs to be terminated, it will have an impact on the entire community.

## Part-Time Employees

### Pros

#### – *Flexibility*

Part-time work allows for greater flexibility within your schedule and reduces costs for benefits. Part-time employees are great for filling in when other staff members are sick or on vacation. These employees can be assigned to specific short-duration needs of the business weekly while leaving you the flexibility to monitor the schedule and make changes to best suit the business needs. Part-time employees can also play a strong role in general support for the prime hours, whether it be on the training floor or as member support.

#### – *Seasonal*

Part-time employment can come in handy during busier seasons. Maybe you need some help on Saturdays during a “bring a buddy” class or other promotional events. Since you are still dictating their schedule, they qualify as an employee, so a hiring process is necessary. Part-time employment can be a simpler process than committing to someone full time.

#### – *Costs*

Part-time employees don't have the same labor requirements as full-time employees, specifically in areas of sick leave, vacation days, and equal benefits (if you offer them). In addition, there are reduced requirements and associated costs when it comes to workers' compensation, injury leave, and unemployment, should any of those become necessary.

#### – *Availability*

You may find, when searching for part-time employees, that you increase your talent pool to include those who have other jobs. This may ease some of the strain in the hiring process.

### Cons

#### – *Loyalty concerns*

Just as with independent contractors, you may find part-time employees are also only “bought in” part time. There is also less opportunity for relationship building and in-person time.

#### – *Distractions*

Part-time employees may have other jobs, which could limit their availability and contribute to a lack of accountability.

#### – *Incomplete Work*

With part-time employees, there can be a possibility of lower-quality work. Proper training and onboarding are integral to how effective employees are (regardless of whether they are full time or part time).

# INTERVIEW TIPS

Below, you will find some examples of how to ease the hiring process based on your hiring style. Having a process in place will create a more fluid onboarding experience, not only for you but also for the potential hire. Set the standards early and often.

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## Preliminary Interviews

For certain positions, such as front desk associates, much can be learned from a simple video interview. One idea is to request applicants to send a resume and one-minute video explaining why they're interested in the position. This allows management to determine whether the candidate can follow simple directions and express basic enthusiasm about fitness. If the applicant successfully completes this step, it minimizes the chance of a manager wasting time on an in-person interview.

## Professional Environment

Establish a clean, quiet area where you can hold the interview without distractions. Let the front desk know to hold calls for you and avoid interruptions if possible. Have a place for all attending to comfortably sit. Put away dogs, cell phones, computers, and food. Be well kept — don't come straight from a workout or appear disheveled. You're clean and put together on the floor and behind the front desk. Portray that image to potential new hires as well.

## Facilitator

If possible, any new hires should be interviewed by the affiliate owner and at least one staff member who will work closely with them. You should pull these individuals together and prepare them by offering context on the candidates and the expectations of the role. If you are involving more than one person on staff in the interview process, then be sure to assign them a focus area for the interviews (i.e., values, hard skills, prior experience, etc.). This will help keep the interview process organized and efficient.

## Example Interview Questions

- Can you start by telling me a little about your fitness background?
- What accomplishments are you most proud of in your previous roles?
- What attracts you to CrossFit? This position?
- How do you structure your typical day? How do you stay organized?
- Tell me about a time you made a mistake at a previous job. How did you handle it?
- Where do you see yourself in five years?
- What questions do you have for us?

## Additional Questions for Coaching Applicants

- How would you describe your coaching style?
- How many hours are you currently coaching?
- What kind of growth opportunities would our affiliate provide you as a coach?
- Conversely, what unique knowledge, skill, or value would you bring to our team?

A candidate's responses will give you a window into their knowledge, attitude, and sense of humor. Watch for signs of "sour grapes" about former employers. Also, be alert for areas people seem reluctant to talk about. Probe a little deeper without sounding judgmental.

Pay attention to the candidate's nonverbal cues, too. Are they alert and interested? Are their clothes wrinkled and stained or clean and neat? A person who can't make an effort for the interview certainly won't make one on the job if hired.

Pay attention to the types of questions they ask. This is when applicants can show if they have done their homework and are familiar with your business or if all they care about is what they can get out of the job.

## Concluding the Interview

End the interview by letting the candidate know what to expect next. How much longer will you be interviewing candidates? When can they expect to hear from you?

## Follow-Up

Whether a person moves forward in the hiring process or not, commit to following up with them by sending them a courteous email thanking them for their time and for considering employment at your gym.

## Decision Making

After the interviews are complete, bring the interview panel back together to debrief and share notes. While the decision on who to hire is ultimately up to the owner, getting feedback from others can be helpful. Having buy-in from others on the team will help set the new hire up for success.

## Informing the Candidate

Once a decision is made, put together a formal offer letter with compensation and benefits information to send to the candidate. Also, send a full description of the role, including daily responsibilities and evaluation criteria so there is full transparency about the expectations of the position. Accompany the email with a phone call to express your excitement and give them an opportunity to ask questions.

# ONBOARDING NEW HIRES

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## Training

*Here are some recommendations for the onboarding and ongoing training processes for your team:*

- Require new hires to complete a manual or study guide outlining gym policies, processes, and the expectations of their role. They'll walk away with a stack of notes they can refer back to if and when they forget a key piece of information. People are more likely to remember something when they write it down.

▶▶▶ [Playbook Resource Center: Sample Hiring & Onboarding Documents](#)

- Require new hires to shadow exemplary staff members and progressively transition into taking on more responsibility. For example, coaches in the CrossFit Seminar Staff apprenticeship program start by simply shadowing other coaches. Then they begin to lead portions of class, starting with announcements, progressing to the warm-up, and ultimately covering the course. This is a good model to follow. Give front desk associates and managers-in-training small tasks to test their abilities and build confidence before they are required to work at full capacity.
- Simulate interactions with members or potential members to assess how your new team member will respond. For example, give the front desk manager an opportunity to talk to a potential new member. The manager poses as a walk-in asking about membership prices and gym offerings. For a coach, this provides an opportunity to assess how the new hire provides feedback. These role-playing sessions should also include difficult questions staff should know how to handle.
- Test new hires on key concepts throughout the training process. People retain information better when they are tested and given feedback. Try periodically quizzing new employees on key information, such as class offerings, membership prices, and policies.
- Monitor new hires closely during their first 90 days. This includes providing clear, direct, and timely feedback when mistakes are made, and frequently asking the new hire about their onboarding experience to answer any outstanding questions.
- Integrate each new hire into the team so they feel like a member of the community within a month of working at your affiliate. This includes featuring them in staff meetings, introducing them to members in person and via social media, and giving them mini “assignments” that involve attending social events and connecting with other members of the community.

# OFFBOARDING

## How to Properly Terminate an Employee

The time may come where you have to terminate an employee or contractor. As painful as this may sound, there is a way to do it well so both parties feel OK moving forward.

Start by creating a plan. Figure out the day and time, when and where it will happen. Write down the most important things you want to say and stick to your script.

*From there, follow these steps for a considerate termination:*

- Get to the point. Skip the small talk and get right to the point. By announcing immediately that it's bad news, the employee will know what's coming next.
- Break the news. State the reason for the termination in one or two short sentences and tell the person directly that they are being let go.
- Listen. Once the employee hears the news, there are some predictable reactions. The most common are shock, denial, anger, and grief. Listen to what the employee says. Your response will be more effective if you know how they are taking the news.
- Cover the essentials. Be specific about what happens next. Will they get severance, when is their last day, etc. This is the one time when you shouldn't say, "I'll get back to you on that."
- Wrap it up and be gracious. End the conversation by thanking the employee for their contribution to your affiliate. Walk with them to get their things and take them to the exit. Shake their hand, wish them well, and part with dignity intact.

A final note: A common problem with terminations is they don't happen as quickly as they should. Once you've made the decision to let your employee go, don't hesitate. We often think things will get better or eventually work out, but they never do.

We also suggest you consult with a local labor board and/or employment attorney to be sure you follow all mandatory guidelines. Improperly terminating an employee can be a very costly mistake on many levels. You will want to be sure to follow a very strict set of measures when termination is imminent for an employee.

# STAFF DEVELOPMENT

A critical part of your job as an affiliate owner is to develop your staff. You can't possibly coach every class, greet every member, and clean every bathroom. While it may feel like you have to at first, eventually you'll need to delegate these responsibilities to your staff. And your staff needs to reflect the values and standards of service you set for your gym. They need to be committed to fighting for your vision.

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## 10 Staff Development Tips

- Know that your business, and you personally, cannot succeed without your staff succeeding.
- Get to know your staff members as people.
- Be vulnerable. If you bring your full self to work, open up about your life, and aren't afraid to show your strengths and weaknesses, you'll encourage your staff to do the same.
- Set aside at least one hour each quarter for a one-on-one development conversation with each member of your team. Use this time to discuss their performance, goals, and future at the affiliate. Be sure to take notes you can reference down the line.
- Give direct feedback in real time. Make sure you are giving feedback on great performance as well as poor performance, using specific examples. When you point out poor performance, always provide suggestions for improvement.
- Create a team. A collection of individuals will remain just that until you make an effort to bring them together as one unit, one team. Bring the full team together to discuss the business on a monthly basis and for bonding activities every one to three months.
- Make sure every employee knows and truly believes in the values of the business. One great way to do this is to integrate your core values into everything you do.
- Identify everyone's strengths and give them an opportunity to put those to work and really shine — inside and outside the bounds of their role.
- Publicly celebrate success. When an employee does something exceptional, make sure you call this out and celebrate it with the team.
- For the members of your team who supervise other employees, be sure to invest time and energy in developing their leadership skills. Your job is to guide and empower them to build those skills and develop confidence as a leader.

# DISCIPLINARY ACTION

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Everyone makes mistakes and has messed up at some point — coaches sleep through their early morning classes, staff members have forgotten to lock up when closing, and managers have dropped the ball on member services.

It's frustrating when you place your trust in someone and they let you down. These are the realities of owning a business, and you can't control your employees' behavior, but you can control how you respond to it.

*Here's a step-by-step model you can use when shit hits the fan:*

## – STEP 1: Damage control

Your first priority is to minimize the fallout. If you wake up to a call that the opening coach overslept, start problem solving. Is there another coach on site who can step in? Can a trusted member lead the warm-up while you find a replacement? Always be ready to step in and perform any role yourself if necessary. If the problem involves upset members, be prepared to offer concessions (a free class, a verbal apology) to guarantee their satisfaction.

## – STEP 2: Listen first

As soon as possible, meet with the staff member. Whenever possible, hold these meetings one-on-one (unless the problem involves an interpersonal conflict) and in person. Phone calls are second best, but do not provide negative feedback via text or email — your tone can be easily misread, and there is little opportunity for a conversation.

## – STEP 3: Respond

Provide immediate, direct, and clear feedback to your team members. Start by reminding them what the rules are and why. For example, if a coach has their phone out during class, remind them that your “no cell phone” policy exists for members' safety and to guarantee the coach's undivided attention. Create a plan to rectify the behavior moving forward, and be sure to document the conversation.

Playbook Resource Center:  
**Disciplinary Action & Termination Resources**

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## RECOMMENDED READS

- ▶▶▶ [The New One-Minute Manager](#)
- ▶▶▶ [8 Key Tactics for Developing Employees](#)
- ▶▶▶ [Managers Can't Be Great Coaches All by Themselves](#)
- ▶▶▶ [How Humble Leadership Really Works](#)

## Employee Engagement Interviews

At least once a year, affiliate owners should meet with their team members individually. Ask open-ended questions that invite employees to honestly self-reflect on their current performance, goals, and needs. The outcome of the conversation should be a clear and mutual understanding of the employee's current performance level, an achievable goal for their future, and a concrete plan for how to develop the skills and experience necessary for continued success.

*Here are some questions you might use to guide these conversations:*

- What do you enjoy most about your position here?
- What type of feedback would you like to receive about your performance that you currently aren't receiving?
- What opportunities for self-improvement would you like to have that go beyond your current role?
- What talents, skills, or interests do you have that we haven't made the most of?
- What have you felt good or proud about accomplishing in your job since you started?
- If you could change one thing about your job, what would it be?
- Do you understand the strategic goals of the broader organization?
- Do you know what you should do to help the company meet its goals and objectives?
- Do you have a good understanding of informal structures and processes at the organization?
- What is something you would do differently if this was your gym?

**When people are financially invested, they want a return. When people are emotionally invested, they want to contribute.**

- Simon Sinek

British-American author  
and motivational speaker



# Team Meetings

Team meetings can serve many different functions. When you first open, you may choose to meet with your team weekly to facilitate staff bonding and get your team members familiar with your expectations. Meetings might evolve into a combination of team building, coach development, group discussion, and announcements.

Team meetings don't have to happen every week, but keep your staff in the loop with reminders, announcements, and upcoming events. Meetings are also a great time to discuss any member issues you and the team are facing and the best means to resolve them.

Prior to a staff meeting, have a set agenda and stick to it. Your staff should feel you respect their time and hold everyone accountable to a higher level of professionalism. Turning staff meetings into glorified hangout sessions can have a negative impact on the business over time.

At times you may want to begin or end staff meetings with a workout. Many affiliate owners have found that working out together is one of the strongest ways to support team building and create bonding moments. Meetings can also be taken off site and occur over a meal. Time in meetings should be paid.

***Have a meeting template or agenda ready covering these suggested topics:***

- Positive review or a note from a member
- Notable positive interactions from staff
- Highlight growth in the business
- Announcements — events, activities, special courses, new equipment
- Additions — class schedule or new team members
- Community
- Goals and progress
- Give each team member an opportunity to share
- Anything else?
- Closing statements





# BRANDING, MARKETING, & SALES

# Building Your Brand

Your brand includes everything from the colors in your logo to your CrossFit affiliate's mission statement, social media posts, class offerings, and staff conduct. As a CrossFit affiliate owner, you'll have access to the CrossFit trademark and brand we've been building for more than two decades. We recommend you understand basic branding principles and apply the following strategies as you think about your brand.

## 01 *Who is your ideal member?*

If you haven't developed membership persona profiles or robust profiles of your ideal members, this is the place to start. Just as your core values shape almost every business decision you make, member personas can shape almost every aspect of your brand identity.

Determine what your potential members value from a brand. Are they looking for cost savings and willing to sacrifice the quality of the facilities, or do they want the highest-quality facility, equipment, and trainers? Do they want top-notch group class instruction by highly skilled coaches or are they OK with mediocrity that matches the price they are paying? Do they want an involved and committed community or just to come and go with not much emotional attachment to the gym, fellow members, and/or coaches? By understanding your ideal members' pain points and priorities, you can formulate a relevant identity.

## 02 *What pain points do you solve at your affiliate?*

Generally, your members don't start looking for you because their lives are perfect. Chances are, you offer a health and wellness program that will drive them to solve the problems associated with being or feeling unhealthy or inadequate, for example. Maybe you offer personal training and they are tired of going to the gym with no accountability. Maybe you're known to have a fun and safe environment, and the last gym they were part of felt intimidating or unsafe.

Your members need you because of an existing pain point or problem. Your brand identity should instantly communicate how you solve these problems. Do you offer peace of mind? Certain results? Support systems? Needed amenities? Ample parking?

Regardless of how your brand connects with your members, your ability to solve problems should be at the core of your brand identity. These are the types of questions you should evaluate and answer to establish your brand identity.

## 03 *What is your personality?*

Brand personality is formed of the set of human characteristics connected to a brand. Brands with a strong, well-developed personality instantly win some likability points because customers are able to relate to them on a personal level.

Human personalities are never single-faceted. Brand personalities shouldn't be either. When you are in the beginning stages of defining your personality, it may be helpful to think in terms of archetypes.

## 04 *What or who is your competition?*

Competitive analysis can be a helpful first step toward developing any marketing strategy. Brand identity is no exception. The branding lessons you can garner from your competitors can vary significantly according to your industry and the level of competition you're facing. Also note: Just because a competitor is successful or has a big budget, this doesn't always equate to having a great brand or brand identity.

Your competitors could be textbook examples of poorly defined brand identity. They may have little to no voice consistency across digital media or a logo that's unoriginal. Perhaps they have an excellent brand identity that's memorable, unique, and incredibly easy to like. Regardless of where your competitors stand, use them as a starting point for creating a brand identity that's objectively better.

## 05 *How do you make your members feel?*

When your most satisfied members communicate with your coaches, front desk, or facilities management, what do they have to say? Listening to member interactions can reveal a wealth of information about how you make them feel.

Do they express relief, inspiration, new-found energy, a sense of belonging, feelings of safety? The most frequent positive emotion your members associate with your company is critical information for building a brand identity. Use this emotion to select visual identity aspects, including the optimal colors and fonts. Remember, it's never too late to enhance, change, refresh and/or overhaul your brand.

## 06 *How are you different?*

What does your brand offer that your competitors do not? Perhaps more importantly, how can you communicate this in your brand identity?

Whole Foods is one of the most visible and well-known organic grocery chains. Its distinctness is communicated clearly in the brand's logo. But simply being different isn't enough. You need to actively make a difference, which means carving out a niche and continually playing to your strengths. Anyone who's shopped at Whole Foods knows the grocery chain isn't trying to compete on price. For Whole Foods to maintain its niche with fresh, local, and specialty food items, it can't compete on price. Considering its brand identity, that's perfectly fine. Yet knowing it's pricey, you still return over and over again for your trust in its products.

## 07 *Why do your clients trust you?*

Conducting member interviews and surveys and talking to your coaches and staff can be important tools for learning why your members pick you. The factor that leads to prospective members' trust and member conversions can provide important clues to your brand identity. Do you do follow-up consults or surveys with new members to find out why they chose you? What was the deciding factor? What did they like best or least about the intro/on-ramp/sign-up process?

Your company's unique trust factor could be transparency, expertise, flexibility, or ease of communication. Use this trust factor as a tool for defining why your brand is different and building an appealing brand identity.

## 08 *What's your story?*

Brand stories are an important component of branding. This includes both your personal history, such as how and why you opened your affiliate, and the story of the role you play in your members' lives.

Your brand's story should make your members and community the heroes. Perhaps you're able to make them more effective at their jobs by increasing their energy. They could be more confident and see improvements in their social lives and relationships. Maybe they developed a new romantic relationship from meeting someone in your gym or are feeling more confident. These stories can be an important touchpoint for your brand identity and marketing content.

## 09 *What are five words that describe you?*

An important exercise for defining your brand's identity can be developing a list of five adjectives that describe your brand's personality, look, and voice.

Consider these questions when coming up with your five words: What drove you to start your affiliate in the first place? How is your affiliate different? By examining the values that run through your gym, you can begin to develop a list of descriptive words.

## 10 *What's wrong with your brand identity?*

Regardless of whether your business has put effort into defining a brand identity in the past, you've still developed some form of an identity. It may not be cohesive or well developed, but identity is inevitable.

If your affiliate is considering rebranding or a brand definition project, it may be worthwhile to consider why you're initiating this effort. Is your existing brand poorly defined to the point that it's almost non-existent? Is it a poor fit with who you really are and what you stand for? Have you introduced a new set of programs or an ownership team that's drastically changed your culture? Is the existing identity not sustainable with the current business model?

Understanding the reason you need to define your brand can reveal where there is room for improvement. Use this knowledge to inspire the right kind of change.

## 11 *Which brands do you admire?*

Developing a list of brands you admire can offer a variety of helpful lessons. You don't need to look at brands with similar products or services, but if you do admire another CrossFit affiliate, explore why you admire it and what you find most attractive in its business persona. Company culture or customer service? How the affiliate speaks to its community? Its social media presence? What concepts can be translated to help with your affiliate?

## 12 *How can you simplify your brand identity?*

Minimalism isn't the right approach for everyone, but few affiliates benefit from a cluttered brand identity. The minimalist aesthetic and design movement is closely associated with concepts of modernism, rebellion, and edginess. It's the concept of stripping down a design or object to the bare elements necessary for function.

It's possible to communicate elements of traditionalism, reliability, and values with a brand identity that's pared down but not minimalist. Simplicity is always better than confusion, but it's important to ensure you're still communicating the right message for you.

### 13 *How do you test brand perception?*

Once you've developed a brand identity, it could be important to test drive it in front of a group of your existing members or other qualified individuals along with some of your most trusted and honest friends. This audience may be able to provide important insights you have missed.

If performing brand perception research isn't possible for your affiliate due to timelines or budget constraints, try researching how colors, fonts, and other aspects of brand identity are perceived by the public. Existing marketing and psychology research can provide brilliant insight into the way your brand will be perceived in the future. In this case, you could learn a lot from a simple internet search.

### 14 *What's your members' language?*

What are the words and terminology your members use to describe your affiliate, programs, and services? There is a good chance they don't head to Google to search for "best fitness community," or "gyms that produce the most clean-and-jerk PRs."

Chances are, they're using more general phrases, such as, "weight-loss programs," "group fitness classes for all levels," or "gyms in my area." Keyword research in HubSpot or another tool can be a critical step toward defining your language. Be sure to do your due diligence. It's not as cut and dry as it may seem. Search engine optimization (SEO) and key wording are specialties unto themselves.

In CrossFit, we speak our own language. Using AMRAP may make sense to you and your existing membership. However, to the masses it sounds more like a tech term or medical device. It has no emotional engagement. Use words that will make sense to those not yet familiar with our language.

### 15 *How does your logo communicate your brand?*

Your company's logo is one of the most important aspects of your visual brand identity. Your logo will be one of the few original aspects of your visual identity, and an effective logo can create a lasting impression.

**An effective logo design is:**

- **Original** - Include some visual elements, such as color combinations or design elements that no other company has. There are exceptions when trying to capture market familiarity or brand trust by utilizing certain likenesses without infringing on well-known brands.
- **Timeless** - Avoid incorporating trendy design concepts to ensure your logo will age well over time. Will it be relevant in 5, 10, 50 years? Remember when spinners were cool rims?
- **Adaptable** - The logo should scale well from the thumbnail to a much larger scale. It should also translate well to both print and digital formats, large and small. Does it place well on T-shirts, sweatshirts, mugs? Is it conformable to various shapes?
- **Memorable** - While it can be difficult to test whether something is memorable, your logo should leave a lasting impression.
- **Relevant** - Your logo should be clearly connected to your industry and services.

What's the exception? If your brand or logo is so far in left field that it becomes memorable and creates its own relevance to the industry, that's one exception. Remember, rules are set. Then we create exceptions.

## 16 What's your font?

Typography communicates a lot more than just letters. It can impart feelings of energy, fun, humor, traditionalism, and more. Much like colors, humans associate emotions and adjectives with fonts.

*Common font associations include:*

FONT STYLE	TYPEFACE EXAMPLES	PERSONALITY
Serif	Times New Roman, Georgia, Garamond	Authoritative, traditional, respectable
Sans Serif	Helvetica, Arial, Verdana	Modern, clean, stable
Slab Serif	Rockwell, Courier, Museo	Bold, strong, modern
<i>Script</i>	Lobster, Lucida, Brush Script	Elegant, friendly, creative
Modern	Politica, Eurostyle, Matchbook	Fashionable, stylish, exclusive

Most brands' visual guidelines include a list of three or four fonts. This will often include primary and supporting fonts. By selecting typography from within the category that best aligns with your brand's values, you can get the right message to your target customers.

## 17 What are your colors?

Humans associate colors with emotions. Your brand's primary and supporting colors are important components of your visual identity. By selecting colors that are associated with your brand values, you can instantly communicate your company's mission.

*Common color associations include:*



It is important for global brands to take note that color associations can vary according to culture. Blue's perception in the U.S. may be drastically different than in the Middle East.

## 18 *How do you interact with members?*

The voice you use to interact with customers via social media and content marketing is an extension of your brand voice.

*Here are a few questions to think about when reflecting on your interactions with your members:*

- Are you humorous or straight to the point?
- Do you speak from a place of knowledge, relying on personal experience and high-quality sources when offering information and answering questions?
- Is your personal social media separate from the business?

It all matters, and it all directly reflects on your brand. Consistency is key! Your brand guidelines should include instructions for social media and customer interactions so you can deliver a consistent brand experience. Be clear about this message with your staff. Make sure they know and understand the experience and culture you're trying to create.

## 19 *How can you streamline visuals?*

Once you've developed a visual branding style guide, assess it to see if it can be streamlined or improved. Your visual identity must be able to scale up and down across digital and non-digital media. Test the digital and print performance of your logos, color combinations, and fonts.

## 20 *What does your voice sound like?*

When it comes to defining and documenting your brand voice, look to your members for inspiration. When your potential and existing members read your published information and/or you speak, what does it sound like?

- Is your voice academic or conversational, casual or professional?
- Do you reference articles, books, and statistics frequently?
- Are you prone to incorporating anecdotes or stories?
- Are you long-winded or straight to the point?

Your brand's voice should sound relevant and reflective of your members' interests, language preferences, education level, tones, etc.



# ACQUISITION MARKETING STRATEGIES

One of the most critical metrics for the success of your affiliate is the number of members you have. You should always be trying to increase your membership by not only bringing in new people but also working to retain those already in the door.

One way to do this is to design campaigns to draw in new members and engage those who are already part of your community.

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## Seasonal

Run campaigns around a season, holiday, or notable occasions on the calendar. These are a gift, as the themes are created for you. From Teacher Appreciation Day to New Year's Day, you can spin a theme into a creative campaign to attract new members or recognize your current members.

*Example from an affiliate:* On Valentine's Day, we ran an email campaign that went to anyone who had taken an intro class or came in for a single class but did not sign up for a membership. Our hook was, "Give Us a Second Date," with some funny copy about how maybe we talked too much on our first date. We offered three-day passes as an incentive to come back. More than 40 percent of the people we emailed and followed up with showed up for a second-chance trial. Of those, we converted half of them into a paid offering. Think about how many people have tried a class but didn't buy in the past couple of years. At 100 people, 40 would have shown up, and 20 would now be paid members in some capacity.

## Reactivation

Reactivation campaigns are for members you haven't seen in a while or who came in for multiple classes but didn't sign up for a membership. This is an especially important type of campaign for owners who have been in business for a while. Your potential new members might be right there in your database waiting to be revived. It's often easier to get them back in than to attract people who are totally new to CrossFit.

## Call to Action

Every communication should have a call to action. This could be announcing something new at your gym like an extended schedule or introducing a new coach. The most straightforward call to action is a promotion, but we try not to overuse this strategy. It can hurt your brand to have a new offer every week. That strategy teaches people that if they just wait long enough, a better offer will come along. If you choose to run a promotional offer, make the value consistent.

## Referrals

There are no better sales people than your members. Referral programs work. Offering referral perks for your members can be highly effective.

*Example from an affiliate:* At Thanksgiving, we send holiday-themed communications to our members inviting them to bring in a friend to work out with them. As a referral incentive, if someone brings in a friend who ends up becoming a member, we give them \$100 to use toward their membership or to purchase merchandise.

### Corporate and Local Business Memberships

This is also very much related to your market. If you are in an area with many larger businesses (more than 20 employees), it might make sense to try and sign them up for a corporate wellness program. However, this process could be long and slow and may not pay off in dividends.

Another option is to build relationships with local small businesses and encourage their employees to join. You can offer them lightweight promotions, such as private classes or discounts on a group rate. Building strong relationships with other businesses in your community will benefit you greatly.

### Flyering

Flyering is an easy way to get your brand out there. Be strategic about where you place your flyers, though. Farmers markets and local businesses are great places to advertise, but it is not recommended to put flyers in front of another affiliate.

*Tips from an affiliate:* When you're walking into a local business to hand out flyers, greet people warmly, smile, and dress well. These little gestures will go a long way. I also think there's something about getting out there with flyers that keeps you grounded and reminds you no one is going to take your business more seriously than you.

### Digital Marketing

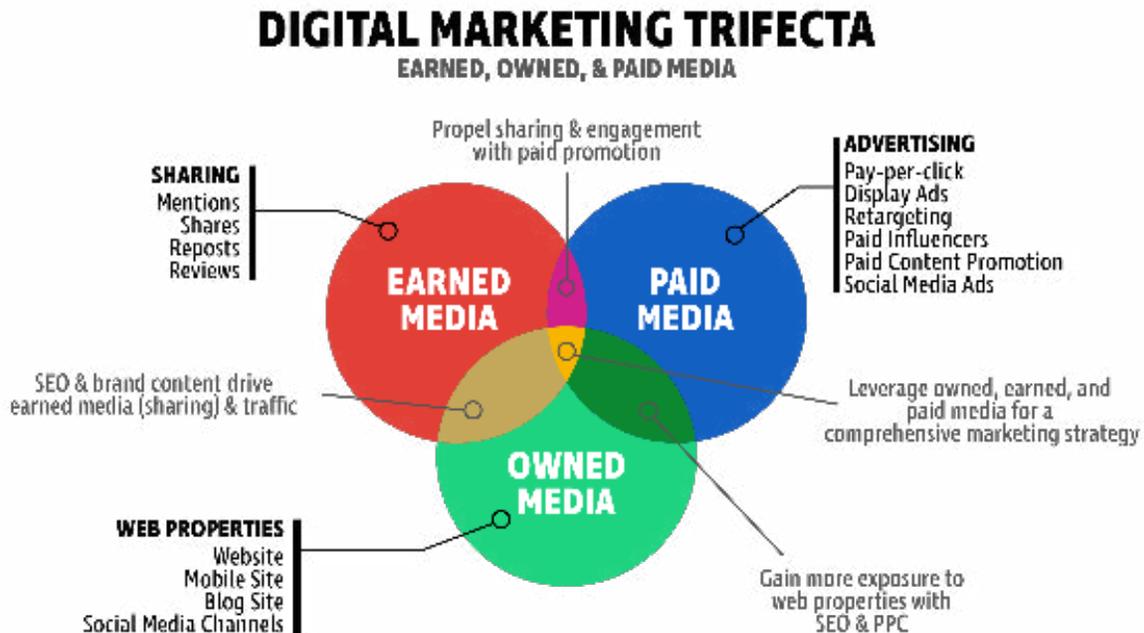
As an affiliate owner, finding a balance between professional social media and personal social media is important. Digital marketing can be highly effective and helpful to your business, and it does need to be taken seriously. Start by educating yourself. The [Kissmetrics Blog](#) and [Forbes](#) have great articles on everything, from the best time of day to post to the most compelling content. Learn which types of media your current/potential members are most engaged with and invest there. Also keep in mind that digital marketing and social media are always changing, so do your best to keep up with what's current.

*There are three key areas to look at when analyzing your digital marketing efforts and optimizing how best to leverage your efforts for market exposure.*

- 01 Paid** - This is anything in digital media you pay for, which can be content or ads you pay for to promote on Facebook, Instagram, or other sites. Cost per click or paid email campaigns are both considered paid digital marketing.
- 02 Earned** - This is media exposure that is gained from anything other than paid content. How you rank on a Google search without paying for search engine optimization is earned.
- 03 Owned** - This encompasses any web property you control, including blogs, video content, podcasts, and general media, all of which are proprietary to your business.

Each of the above is an important part of your digital media strategy and the approach you take. Each has its own set of considerations based on the local areas that impact the direction and focus taken for a digital marketing strategy.

Here is an infographic to help you visualize the thought process and approach behind each. You will notice they all can have a direct impact on each other. Earned exposure is the most cost effective. However, you will want to navigate the financial aspects tied to various digital marketing strategies and analyze their relation to your budget. Paid exposure isn't always as effective as earned, and leveraging owned media doesn't always have the same return on investment as paid. Through proper planning, testing, and tracking, you can create a results-driven digital marketing strategy for your affiliate within its unique local marketplace.



## Search Engine Marketing and Search Engine Optimization

Search engine marketing (SEM) is a paid approach to how and where you appear in web searches.

- When thinking about SEM, you can look at it as paying for better placement and/or a wider variety of keywords when people are searching the web. For example, you may pay to come up in a search when someone types in “fitness,” but note that broader terms will draw costlier fees and high costs when people click through. These costs fluctuate based on the terms used and the number of other businesses bidding to be placed higher. More demand will drive those costs up.

Search engine optimization (SEO) refers to the organic means that impact how you appear in web searches.

- SEO can be a very cost effective and powerful way to drive traffic to your website and business. This initiative focuses on the organic means of heightening your position in searches and/or elevating the chance that those searching will see your listing. Here are some key items to look at and review (Many of them are fairly simple and don’t require a paid professional to manage. Others will be best suited for your web hosting company to handle).
- How secure and accessible is your website? How quickly does your site load? Look at your URL and domain, the optimization of the content. How unique and/or original is the content, including blogs and articles? Are the key words and/or terms used throughout the site and links associated?

The above considerations can get tricky, and much like the paid SEM, your local area and targeted sites will impact how simple or technical the tasks will be to elevate your position in web-based searches.

## Blogging

Your business can use blogging to share original content in a variety of formats. Two of the most popular and impactful approaches involve generating discussion and being informative. Let’s take a look at these two blogging styles to see how they can drive traffic to your site, build your social media presence, and eventually bring people into your gym.

### Discussion

Discussion-based blogs open up a space where your community can engage with specific topics, ask questions, and receive answers. Discussions can be focused on a one-off theme or be ongoing, taking place over a longer period of time. Another option is to repost another blog while properly crediting the source and opening that up for conversation within your blog. You can give your take or stimulate discussion by asking your community to share their thoughts. This is an easy way to capture fresh material on a theme or article weekly, monthly, or at whatever cadence you prefer.

Discussion-style blogs require a bit more time and energy, as you will want to stay involved with the ongoing conversations and questions to maximize the time and frequency with which viewers engage with your blog. The goal is to keep them coming back.

### Informative

An informative blog is the most versatile and free-flowing type. It allows you to generate original content or repurpose outside public sources, always providing proper credit to the original author. It is recommended you stick to topics that best serve your business and community. (See the four general purposes of blogging below for additional considerations as you select your topics.)

Informative blogs are a great way to elevate your affiliate and your own expertise in the fitness industry. For example, if you or one of your staff are well versed in performance nutrition, posting monthly blogs on eating for performance would be a great way to utilize your platform. You will drive traffic to your site through engaging and informative content while promoting yourself as an expert in performance nutrition, and you can use that to leverage enhanced SEO placing and searchability. Ultimately, this will drive more people to your affiliate.

*Let's take a deeper look into the four general purposes of blogging and how they positively impact your business.*

### **Blogs serve four general purposes:**

#### **– Create awareness**

- Engaging content will capture the interest of those who visit your site by allowing them to participate in a discussion and/or learn information. Brand awareness is important because it helps audiences understand, recall, and become comfortable with your branding and products.

#### **– Promote your affiliate as the material expert**

- Find compelling ways to express your messaging on the topics you choose to write about. Writing with a passion for what you know best will make the content feel more organic, genuine, and trustworthy. You must also gain trust by having strong validity to your claims. Making general statements with little facts can negatively impact your efforts. Be sure to have solid facts, science, and/or research to back your messaging. Opinionated blogging, although intriguing, is drastically more risky than fact-driven content.

#### **– Enhance your SEO**

- Blogging is good for search engine optimization because it helps with a number of important ranking factors. Having a regularly updated blog of high quality can impact how well your website performs in searches. SEO is really its own industry, so it's recommended you spend time researching and learning more about algorithms, key terms, tags, and URLs. [Learn more about how to enhance your SEO using your blog.](#)

#### **– Generate leads to drive traffic into your business**

- Websites with blogs have more traffic and generate more leads than other sites. This is because these websites are constantly creating new content relevant to Google searches. The more quality content you create, the more searchable your site becomes. Regular blogging also inspires others to repost and share your content with other potential members and on other sites.

**Quick tips when blogging:**

- Use engaging titles.
- Constantly use keywords throughout the article.
- Pose questions to the readers.
- Make sure your business info is easy to read and/or share.
- Link the article to all your social channels (e.g., Instagram, Facebook).
- Limit your use of photos. If photos are used, create short descriptors of what the photo is.
- Make sure everything is mobile friendly and loads quickly.
- Avoid posting anything that is unnecessarily contentious or inflammatory.
- Do not state untruths.
- Stay positive, upbeat, and engaging when communicating with your audience.
- Update your blog at least monthly, and ideally, more frequently.

**EXTERNAL RESOURCES**

▶▶▶ [What Is SEO and How Does It Work](#)

▶▶▶ [SEO for Beginners](#)

## **Social Media**

Social media is a given these days and should be a key element of your digital marketing strategy. If you aren't keeping up with social media, you're going to fall behind. Although this is an ever-evolving digital space, Instagram and Facebook should be your main focus. If you see relevance in TikTok, LinkedIn, or other social media resources, by all means use them.

Below is link to a sample social media calendar you can review to begin building out your own.

▶▶▶ [Playbook Resource Center:  
Sample Marketing Materials](#)

**Example of a Social Media Calendar:**

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**Weekly**

- Specialty class (if in session) schedule - Mondays at noon
  - Gymnastics, Endurance, etc.
- Weekly reflection and/or member highlight - Mondays, early morning
  - Focus on effort base and not load.
  - Attitude over everything
- Weekly nutrition tip/recipe/coach's favorite healthy meal
  - Results driven

**Bi-weekly**

- Highlight a gym principle or member who embodies the principle - any weekday Tu-Fr
  - Tie in your core values
- Highlighting gym check-in - Facebook members group
  - Use this to note key markers - a member's first, 50th, 500th class
- Programming highlight
  - What's coming for that specific day
  - Stay away from Rx'd and weight-focused content

**Monthly**

- Announcements of any kind - internal and external events, activities, highlights, etc.
  - This can include schedule changes and other notable operational notes.
- Member of the Month write-up - same day each month (also push via email/newsletter)
- New and old members' spotlight
- Product spotlight - 21st of each month - this can be adjusted for when new products launch or drop in the retail shop

**Every 3 months**

- Award of Virtuosity - every three months/quarterly, give a member an award for going above and beyond to be a good human in their community
- Coaches corner - long-form video with a coach highlighting a skill or talent or promoting their material expertise in a specific subject
- Beyond the Whiteboard highlight - something related to the gym or a member who has external community impact

**Every 6 months**

- Gym member video interview
- Coaches video interview

**Every year**

- The highlight
- Seasonal calendar yearly - Christmas, New Year's, spring break, etc.

Doing a standard theme rollout throughout the year allows for less time making it up as you go along. This will keep you on track with preparing the content you need to post. You also can use a blank calendar and fill in the days/dates — whichever method fits your style best. What’s most important in this takeaway is to at least have a method to the madness. You will want to be consistent with anything you implement so you can have the greatest impact within your membership base and among those following you on social media.

*Sample affiliate newsletter:*

**SEPTEMBER NEWSLETTER**  
CALI CROSSFIT

**CF**

**CALI Throwdown**  
SATURDAY, AUGUST 13  
CHECK-IN FROM 8:00AM - 8:30AM  
ORIG. TWO SIDES AND THRODOWNS AGAINST OTHER TELLOW MEMBER TEAMS  
SPECTATORS CAN ENJOY MUSIC, GAMES, BBQ, AND OTHER ACTIVITIES!

**BLOOD & SWEAT BARBELLS**  
NATION-WIDE BLOOD DRIVE  
SATURDAY, SEPTEMBER 24  
CALI CROSSFIT  
BLOOD, TONS & BARRDYS DRIPPERS START AT 10AM  
CAN'T GIVE BLOOD? NO PROBLEM! GET AWARDED FOR SOME MARROW, OR DONATE A NEW UNWRAPPED TON!

**UPDATES**  
SCHEDULE CHANGES & NEW WEBSITE!  
CHECK OUT OUR NEW NORTHERN CALIFORNIA WEBSITE & CHECK THE SCHEDULE FOR OUR MOST RECENT CHANGES  
[WWW.CROSSFIT.COM/US/CA](http://WWW.CROSSFIT.COM/US/CA)

**STAY UP TO DATE!**  
JOIN THE CALI CROSSFIT FACEBOOK GROUP!  
GET UPDATES AND BE A PART OF THE COMMUNITY!

**HOW ARE WE DOING?**  
SEE JUDY FOR A LINK TO OUR TESTIMONIAL FORM  
LET US KNOW HOW WE'RE DOING AND WHAT YOU THINK ABOUT OUR COMMUNITY!

QUESTIONS? COMMENTS? EMAIL [INFO@CROSSFIT.COM](mailto:INFO@CROSSFIT.COM)

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# SEARCH ENGINE OPTIMIZATION (SEO)

Do you know what pops up if people search for your affiliate online? Did you know you can control this? SEO is an essential tactic to drive traffic to your website and grow your online visibility. With SEO, you can optimize your website through technical optimization, content creation, and on-page and off-page SEO. This will create the best results for Google searches.

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## Technical SEO

This focuses on improving the technical structure of a website, such as site speed, mobile friendliness, data, and security, to name a few.

## Content

Content is one of Google's main ranking factors. Without great content that matches key search words, you may not rank in the top spot.

## On-page SEO

This is about optimizing factors on a web page to clearly help search engines understand the content in the right context. This includes titles, headers, meta tags, and image alt tags, to name a few.

## Off-page SEO

This approach focuses on improving the trustworthiness of a website through the eyes of the search engine and the users. If a search engine sees that users trust a website, they will be more inclined to rank it in a higher position. This comes from link building, PR, and other similar methods.

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# Search Engine Marketing (SEM)

Search engine marketing is a strategy that uses paid methods to gain visibility on search engines. Unlike SEO, which uses organic methods, SEM uses advertising platforms like Google Ads to reach targeted audiences. Through SEM, you can increase conversions by setting up and optimizing paid ads.

With SEM, you can see results more quickly than with SEO. You have more control over when ads appear and who sees them. This is a great tactic to use if you want to test out new strategies.

SEO and SEM can work in parallel to drive visibility, traffic, and conversion from search engines to ultimately increase membership at your affiliate. If SEO and SEM are foreign concepts to you, consider working with an IT consultant or marketing expert to build and manage these.

## Events

Events can give you massive name recognition in your community. If you host an event, it must be focused on creating a great member experience and adding value to the affiliate. This is non-negotiable.

*Consider the following when thinking about your event:*

- Will it help member retention?
- Could this generate potential leads?
- Could this event convert drop-ins or reactivate lapsed members?

Events don't have to be big competitions. They could be something related to CrossFit, like an end-of-the Open celebration, a Games viewing party, or just a fun gathering like a potluck picnic or end-of-summer party. These events have the potential to bond your community members and are key to their happiness and retention.



# UNDERSTANDING YOUR TARGET MARKET & PERSONAS

Knowing who your target market is can be very helpful in your efforts to capture new leads and enhance your conversion rate. Know their personas and then how best to attract them. Regardless of where you are in your lifecycle as an affiliate, having a clear picture of who you want to attract, who you are attracting, and who you are mostly surrounded by as potential members is important. Know your members to grow your members!

Before we dive into how to define who your gym's target market is and the best approach for marketing to them, let's first define what a target market actually is.

Your target market personas and/or buyer personas list who, what, when, where, and why as well as general demographics information such as gender, job title, job function, business size, team size, needs, pain points, and challenges. Since every location is different, it's likely that some of the target member personas may change even within miles of your existing space. Having a general understanding of the above will better prepare you in your pre-opening phase as you make location decisions or think about lead generation, conversion, culture, and community development. The people who potentially will and/or do make up your gym impact all those things.

Now that we have a basic understanding, let's dig a little deeper into what buyer personas are and how they will be unique to your affiliate.

## What Are Buyer Personas?

Buyer personas are character profiles you create around the general personalities or character traits of members of your gym. If you are a new affiliate or do not have an established membership base, you can create one from fictional traits developed from doing local target market research as outlined in the business plan section.

»» [Jump Back: Business Plan](#)

Think of this as profiling your ideal members. Buyer personas are based on generalized information about your target demographics. They summarize your buyers' particular goals, health needs, and the services/amenities they are seeking in their fitness journey. A well-thought-out buyer persona can give you insight into what attracts potential members to your gym, specifically, and/or possibly to your competitors. For new affiliates, knowing those attraction points can give you a strong position in your marketing. This will also help identify which services, amenities, and product offerings will help you land the sale while also indicating possible concerns or pain points that could lose you the membership.

## Developing Your Buyer Personas

Here are five feature sections that will help shape and define each of your potential buyer personas:

### 01 *Persona Names*

Each persona should encapsulate one segment or type of member you want to attract at your affiliate — single, married, dual income, ages 24 to 55, seniors, young professionals, etc. Persona names should include an identifier and example name, like "Jersey Mike" or "Millennial Megan."

## 02 Backstory

Flesh out the typical details of this buyer persona to better understand their circumstances — career path, family dynamic, weekly routine, interests, and hobbies. Also think about potential hurdles or objections you'd face in getting them to join.

## 03 Demographics

Identify some broad and general demographics as you build out the buyer personas — age range, gender identity, income range, housing, etc.

## 04 Goals/Needs

What does this buyer persona aim to achieve in their fitness journey? Decrease body fat percentage, enhance biohealth markers, improve mobility, be part of a community, group classes that fit their schedule, experience the convenience of being close to work, etc.?

## 05 Opportunity

How can your gym help this buyer persona achieve the goals they've set for themselves? This is your opportunity to prove your affiliate's value and win their membership. We call these the values and benefits — or Vs and Bs.

*Here is one example of a buyer persona grid created by an affiliate.*

	CROSSFIT CHRIS	WORKOUT WENDY	MAGIC MIKE	NEWBIE NICK	SMART SALLY	SEDAN TERRY
AGE	20 – 40	28 – 45	21 – 40	21 – 40	18 – 25	30 – 50
GENDER	M/F	F	M	M	M/F	M/F
WHAT TYPE OF WORK OR STUDENT?	Professional or Student	Professional or Mom	Professional or Student	Young Professional	Student or Grad	9 - 5
WHAT DO THEY DO FOR FUN?	Beach/Nightlife/Surfing/Paddleboard/Sports	Kids/Brunch/Yoga/HIIT/Shopping/Date Night	Nightlife/Dating/Sports/Bumble/Beach	Nightlife/Dating/Sports/Bumble/Beach	Coffee Shops/Sports/Nightlife/Yoga/HIIT	Date Night/Movies/TV/Fishing/Yard Work
WHERE DO THEY LIVE?	Greater Area	Greater Area	Greater Area	Greater Area	Downtown	Cozy Suburbs
WHAT ARE THEIR GOALS AND REASONS TO WORK OUT?	PRs/Community	Fit and Toned/Network	Get Jacked/Ladies	Look better naked	Fit and Toned/Friends	Weight Loss/Better Life
WHAT PREVENTS THEM FROM JOINING OUR GYM?	Not "CrossFit" Enough	Scary/Life Schedule	Too Many Gyms	Scary/"CrossFit D-Bags"	Cost/School Schedule	Scary/Lack Motivation
WHAT MAKES THEM JOIN OUR GYM?	Coaching/Programming	Safety/Friends/Fun	Coaching/Results	Safety/Fun/Results	Friends/Fun/Results	Motivation/Results
HOW MUCH MONEY ARE THEY WILLING TO SPEND ON MEMBERSHIP?	\$\$\$	\$\$\$	\$\$	\$\$	\$	\$\$

FOR REVIEW | CROSSFIT H.O. | CROSSFIT BUSINESS PLAYBOOK SUPPLEMENTAL

# TARGET PERSONA WORKSHEET

Below, we have attached some exercises to better assist your efforts in creating your personalized target market and target market personas.

**01 Facts**  
Facts will help you distinguish and reference customer segments (marketing) or interview subjects (product development). Think beyond demographics and consider situational/experiential attributes.

Initial/Basic  
Refined/Detailed

**02 Fear/Pain**  
What pain points are your prospective customers currently experiencing in their personal or business daily lives?

**03 Behavior/Workflow**  
How do they currently overcome the pain/fear described in Step 2? Avoid thinking in terms of your product/solution. Describe the product/solution they are currently using, if any. Focus on their perspective and write it in their words.

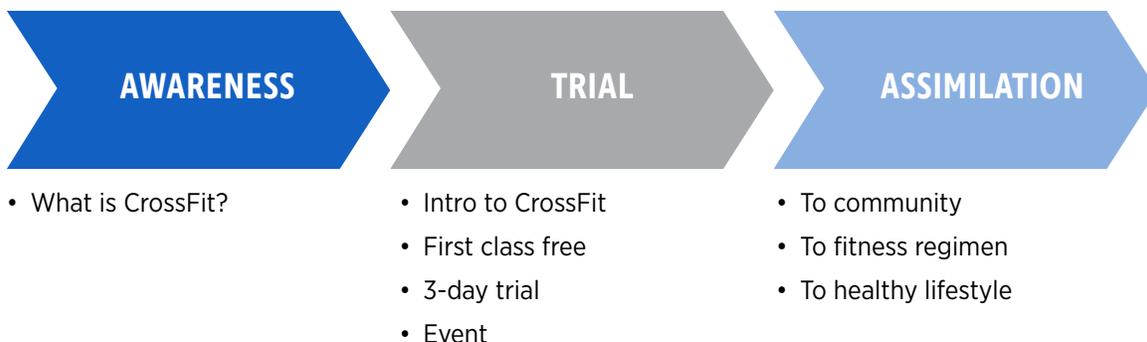
**04 Goals/Aspirations**  
Where do your prospective customers want to be based on the fears/pain described in Step 2 and the current workflow/workaround/behavior described in Step 3? Avoid thinking in terms of your product/solution. Instead focus on their perspective and write in their words.

**05**

# MARKETING FUNNEL

A strong marketing funnel has three elements: awareness, trial, and assimilation. People need to know who you are, give you a try, and then stick with you. It's important to create programming that addresses each element of the funnel.

Here are some examples of how you can approach it:



## Awareness

- Landing pages, website
- Paid advertising: Ad words/SEO/Yelp/Facebook
- Social media
- Flyering
- Exterior facade
- Public relations

## Trial

- Weekly group intro to CrossFit classes, one-on-one intro to CrossFit
- Community partners - two events per quarter in which we host a workout off site
- Corporate marketing - tables in office, meetings, private classes
- ClassPass

## Assimilation

- New member program
- Skill series
- Member of the month
- Monthly newsletter
- Food and fitness challenge
- Community events

# SALES

## An Individualized Approach to Membership Sales

If you're looking to find a one-size-fits-all membership pitch that closes every time, you may be left wanting. Too many businesses across the board fall into an approach where everyone is treated the same. When it comes to selling gym memberships, there is a need for solutions-based selling. Focus on tailoring unique experiences instead of giving the same pitch to every potential client.

You may occasionally get someone who walks through the door knowing exactly what they want, but for the majority of potential clients, this is a process. This means introducing them to your affiliate, showing how it could benefit them, and sealing the deal. With your membership sales pitch, you can use a similar structure but apply it to individuals to help potential members meet their goals. Your gym membership is the solution to their problem, so approaching it from a personalized angle can help you pinpoint what it is your new client needs.

## 10 Steps to Successful Member Conversion

As a gym owner, member happiness is a priority. By taking the right steps, you can appeal to new clients, build relationships, and grow your membership. Each step along the way plays an important part in the overall success of your gym membership sales pitch. Below are some ways you can better position yourself for member conversion.

### 01 *Meet and Greet at the Front Desk*

Whether a new member has called the front desk or come in personally, they should feel like they have your full attention. Take the time to ask questions about their goals, fitness levels, and contact information, and make well-informed recommendations based on the information they have provided.

Make sure your entire team is fully trained on this type of communication and can provide any information needed as well as create meaningful interactions with potential new members. The first interaction between your gym and a potential new member sets the scene for what their experience will be like. Learn how to have meaningful conversations with new clients and teach your staff to do the same.

Stop selling and start listening to your new members. If their goal is to lose weight, instead of launching into your standard sales pitch, ask them why they want to lose weight. Really listen to what they're saying and be prepared to ask follow-up questions. Find out how you could move past these hurdles and truly help your new client meet their goals.

### 02 *Build Rapport With Potential Members*

Building rapport with potential members from the first interaction is crucial. If you've already asked a bunch of questions, ask more. People enjoy talking about themselves, their kids, their interests. Show you care. They're looking for a connection. Be empathetic and show emotion. Finding common ground is a great way to spark conversation and build a relationship with new clients.

Asking a lot of questions is the quickest way to find out their goals and interests. This allows you to make a connection faster, which in turn increases the likelihood of success with your client. Help your potential member, don't just sell to them.

### **03** *Understand the Needs of Your Potential Member*

As you build rapport and a relationship with new members, you'll start to build a picture of their needs. Although the stages for each gym membership pitch are similar, the needs of your members are not. By understanding their needs and goals, you can personalize the experience and create an individualized approach to your sales technique.

You've had your first phone call, and the client has come in to check the place out. Have a sit-down with each individual to get to know them better. Every potential client should get the personal attention they deserve. Focus on a conversation that reveals goals first before moving on to past experiences. All this information will not only help you in the sales process but also make sure you provide a solution specific to your new client.

### **04** *Talk About Value, Not Price*

People don't buy products; they buy the results of the products. Individuals are usually willing to pay more for a product or service they believe has significant value. Price questions may require you to follow a specific sales script, which can make or break the sale. Many prospects ask about prices but they might not know exactly what they want.

Instead, show the value of your services by discovering a potential new client's fitness goals and past experiences. Talking about value rather than price requires confidence and a good personal connection. Of course, the price will need to be discussed at some point, but making sure potential clients see the value and benefit first builds brand awareness early on.

### **05** *The Tour*

Now that you know more about your lead, what drives them, and what they want to achieve, it's time to give them the grand tour. The tour should be specific to your prospect's individual needs and goals. A guided tour with absolutely no attention paid to the lead's goals is a sure way to make them feel like every other person who walks through the door.

Since you've done thorough research and asked lots of questions, you should know what your potential client wants. This means you can personalize the experience by focusing on exactly what they need. Identify facilities that will be of use to them, and position yourself as the expert.

### **06** *The Price Presentation*

Now it's time to discuss the price. Use the information you know about your potential new client to give them two or three different options that are well suited to them based on their goals and interests. If you have properly listened, demonstrated value, and developed a personal connection, then the price shouldn't be a dealbreaker.

### **07** *Close the Sale*

Once you've offered membership options that are fully suited to your new prospect, provide value, and are well-priced, you need to directly close the sale. This is sometimes easier said than done, as simple questions can come up that might make your new client think further about the decision and come back at a later time. Create a sense of urgency without being too pushy. For example, you might try providing guest passes for a limited time only.

## 08 Overcome Objections

It's natural for objections to arise during the sales process. By taking the lead and knowing how to respond to common objections, you can ensure your prospects won't bail at a later time. Address common problems early on in the conversation so they don't arise down the line and cause a serious roadblock to your gym membership sales pitch.

Double-check your client is in the area or can easily reach your gym so location isn't an issue. Outline how their goals will be achieved with your assistance. Make sure to ask questions about any objections, and present tangible, realistic solutions only you can offer.

## 09 Offer a Trial Membership

Trial memberships are a powerful sales tool. From free one-day gym passes to a whole month's membership, offering free trials gives potential members a taste of what it will be like to be a full-fledged member. If your lead is on the fence about whether to join your affiliate, a trial membership may be enough to push them over the edge and sign up.

When you're promoting and marketing your free trials, really think about your wording. When something is free, it might be seen as having less or no value, even though this isn't the case. Try phrasing your free trial membership as a "7-day membership worth \$60." This shows the monetary value of the trial, which will subtly reframe how potential clients might see it.

## 10 Start a Gym Referral Program

A gym referral program is a great way to get new members into your gym. A referral program is a systematic way of getting clients to refer your business to their friends and family. There's usually an incentive involved for both the referrer and the recipient in the form of free class passes, discounted membership, or personalized workout plans.

A [study by Harvard Business Review](#) found referrals, on average, generate 16 percent more profit, and those who join through referral are also likely to be 18 percent more loyal to your business. It's never too early to start asking for referrals. Whether a prospect joins or not, asking for referrals in the form of free gym passes is an easy way for them to share with their friends and family, guaranteeing lead generation.

If you're interested in building a gym referral program but don't know where to start, you're in luck. We've created a quick guide to creating an effective gym referral program.

Playbook Resource Center:  
**Sample Marketing Materials**

## In Summary

Selling memberships is an integral part of a successful gym, but it doesn't need to occur through a strict script. By using an individualized approach, creating a solution, and providing a unique experience, your gym membership sales pitch can adapt to each new client. Build rapport, make connections, and demonstrate value, showing potential prospects you really care and can help them meet their goals.





# MEMBER RETENTION

# MEMBER RETENTION

Getting new members is integral to a successfully run affiliate, but keeping members is equally if not more important. Think about shifting your focus to the members you have instead of the members you don't. Not only will you have consistent business from this demographic, but a happy member will also refer their friends and family to your gym.

*There are three main factors that influence retention:*

- 01 Member satisfaction** - Are your members engaged in your community? Do they feel supported in their goals?
- 02 Staff satisfaction** - Coaches are likely a strong factor that influences retention. Is your staff proud of where they coach, and do they reflect that when they are working with your members?
- 03 Facility satisfaction** - Is your gym clean? Does all the equipment work? Do you have a reasonable amount of equipment for the number of members you have?

*The team you've built at your affiliate can play a big role in member satisfaction and retention.*

## Front Desk Staff or Gym Managers

*During the first visit:*

- Give them a polite greeting each time they enter and exit the gym.
- Confirm correct name and pronunciation.
- Discuss rest days and the class schedule.
- Consider how to introduce them to your affiliate community (add their picture to a new member board, give them a shoutout on your blog, etc.).

*Within the first week:*

- Make a courtesy call to welcome them and congratulate them on their first week.
- Add them to the gym's online communication tool (e.g., Facebook) to welcome them to the gym.
- Introduce new members to the coaches.
- Provide materials or a series of emails that properly introduce them to your affiliate community. This could include a class schedule, class descriptions, nutritional guide, how to sign up for class, etc.

## Coaches

- Confirm correct name and pronunciation.
- Introduce the new member to other members during class.
- Check on their progress compared to their fitness goals.
- Teach them the 10 general physical skills.
- Provide excellent coaching.
- Emphasize that we are a TEAM (together everyone achieves more).

- Deliver powerful and positive motivation in class.
- Highlight them frequently and interact with them before and after class.
- When appropriate, interact with them outside of the gym (via social media or community social events).
- Go above and beyond to deliver an exceptional experience.
- If they are doing their on-ramp or foundations classes, their coach should consider discussing how they will integrate into group classes.

▶▶ Playbook Resource Center:  
**Member Retention Resources**



# COACHING

# COACHING

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## Excellence is obvious to everyone.

The CrossFit coaching profession is marked by a long-standing commitment to excellence in service. CrossFit coaches can take on many forms. In the affiliate environment, the people filling these roles can range from the career coach who makes a living off the profession to the hobby coach who commits a few hours each week to coaching. No matter the depth of their coaching hours, the professional coach plays a vital role in the success of your business. While the importance of strong business systems and operations cannot be overstated, the quality of the coaching offered at your affiliate will bring CrossFit to life for your clients and your business, ultimately determining the success of your affiliate.

For many affiliate owners, it helps to think about each coaching interaction — whether in your group classes, one-on-one training, or work with specialty populations — as the product your affiliate offers. Your product is delivered daily by your coaching staff during each class hour, so how do you develop great coaches to deliver an excellent product?

On the surface it can appear that delivering an excellent product is simply teaching your clients how to do a perfect deadlift or snatch, or programming perfect workouts. However, building a thriving affiliate requires the relentless pursuit of excellence in constant and unending service to your clients. Every day, great coaches ask themselves, “How can I make this better for my people? How can I add more value?”

Business is the art and science of providing uniquely attractive opportunities for other people. In this endeavor, how much you care for your clients carries a tremendous weight. Show up every day with love for your clients, pride in what you offer them, and a profound commitment to making their lives better. Your pursuit of excellence will manifest in a clean gym, being on time, bringing the same energy to the last class you brought to the first, connecting with your clients’ hearts and souls, and earning their friendship. You’ll read books, take courses, and practice to become a better coach on the gym floor just so you can more effectively help your clients.

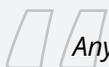
Great coaches chase excellence in service. This is the fullest expression of coaching excellence.

In the following section, you’ll find tools and resources for the trainers you will develop and hire.

Before you get started, we invite you to read the following article:

### »» [What Makes a Great Coach](#)

The following is an excerpt from “What Makes a Great Coach?” (linked above). This article introduces a framework of development for CrossFit trainers.



*Anyone who has experienced great coaching knows the interaction can feel almost magical. Somehow, the coach knows exactly what to say and when to say it. You feel challenged, supported, and confident in your coach's ability to help you achieve your goals. While great coaching can seem effortless, the reality is many skills, attributes, experiences, and techniques came together to create that coaching magic.*

*Coaching is about creating change. Great coaches produce great outcomes, in part, through what they do with athletes in the gym: teaching movement, identifying errors, cueing corrections, and pushing athletes to improve. These basic components of creating change also are very often missing when you watch a class run by a less competent coach.*

*However, the question of what makes a great coach runs deeper and is more complex than the components above. Great coaches have many different skills and attributes that work in concert to create outcomes beyond the comprehension of the average coach. It is not any single thing they do but rather everything they do. Great coaching can seem like magic, but that would belie the observable, measurable, and repeatable process that leads to the development of a great coach. It takes work and determination, but the journey to great coaching is one anyone can undertake.*



## Section 1: Scope of Practice

It is important for any professional to understand their scope of practice. Another way to think about scope of practice is the areas where a professional should strive to excel. The Certified CrossFit Trainer scope of practice provides us with an excellent guide.

### A CrossFit trainer:

- designs and leads CrossFit workouts for both groups and individuals, from beginner to advanced. These workouts are safe, effective, and appropriate for individuals who are apparently healthy or have medical clearance to exercise.
- recognizes the limitations of their own knowledge and skill set and refers clients to other healthcare professionals when appropriate.
- assesses, monitors, and develops exercise programming based on the athlete's current and ongoing fitness and performance goals, fitness level, readiness for training, performance (relative to goals, level, and readiness for training), lifestyle patterns, diet, and nutritional needs.
- teaches functional movements.
- minimizes risk and facilitates sound movement patterns.
- educates and motivates athletes toward exercise-program success and sound nutritional and lifestyle strategies.
- runs an ethical practice and operates with professionalism and integrity.
- minimizes and manages risk for the athlete in the training facility, is prepared for emergency situations, and responds appropriately when situations occur.

For more information on the trainer scope of practice, see the Certified CrossFit Trainer Candidate Handbook [HERE](#).

## Section 2: Framework for Coach Development

The Certified CrossFit Trainer examination conforms to an outline based on areas of expertise and ability for CrossFit trainers.

1. Screening and Ongoing Assessment
2. Programming
3. Coaching
4. Nutrition and Lifestyle
5. Class Management and Professional Responsibilities

This list serves as a vital and important resource for CrossFit trainers to learn and understand the scope of their expertise in each of the five areas.

The outline below provides a powerful tool to target coach development and assess trainer progress. Use this to consider how you will develop your coaches, which resources you will provide to them, and what goals you will set for your team.

### The Six Criteria

*The six criteria listed below serve as the foundation and guide for developing trainers. The following is an excerpt from the CrossFit Level 2 Training Guide and Workbook. We encourage you to read through the guide prior to building your team.*

#### »»» CrossFit Level 2 Training Guide and Workbook

Teaching, seeing, correcting, group management, presence and attitude, and demonstration are the six areas trainers can use to evaluate and develop themselves or the trainers who work for them. An effective trainer must have capacity in each area, and a trainer's effectiveness is limited by capacity in each. A professional trainer continues to develop capacity in each area across their entire career. This is chasing virtuosity in coaching. "Doing the common uncommonly well" does not only apply to movement; it can apply to any particular skill. CrossFit trainers chase excellence in every aspect of their craft, always intending to better serve those who have entrusted their health to them.

A trainer's ability to coach others rests on capacity in six different areas:

#### 01 Teaching

The ability to effectively articulate and instruct the mechanics of each movement, including the ability to focus on major points of performance before more subtle or nuanced ones. It also includes the ability to change instruction based on the athlete's needs and capacity.

#### 02 Seeing

The ability to distinguish good from poor movement mechanics and identify both gross and subtle faults whether the athlete is in motion or static.

### 03 Correcting

The ability to facilitate better mechanics for an athlete using visual, verbal, and/or tactile cues. This includes the ability to triage (prioritize) faults in order of importance, which requires an understanding of how multiple faults are related.

### 04 Group Management

The ability to organize and manage, both at a micro level (within each class) and at the macro level (the gym as a whole). This includes managing time well — organizing the space, equipment, and participants for optimal flow and experience, planning ahead, etc.

### 05 Presence & Attitude

The ability to create a positive and engaging learning environment, showing empathy for athletes and creating rapport.

### 06 Demonstration

The ability to provide athletes with an accurate visual example of the movement at hand. A trainer may do this using themselves as an example or by choosing another athlete to provide the example. This requires a strong awareness of one's own movement mechanics. It also includes the concept of leading by example; a trainer should follow their own advice and be an inspiration to clients.

»» [Coach Evaluation Worksheet](#)

## Section 3: Suggested Development Pathway for the CrossFit Trainer

Great trainers must start somewhere, and in the CrossFit coaching profession that somewhere is the CrossFit Level 1 Certificate Course. The course consists of classroom instruction, small group breakout sessions, workouts, and coaching instruction. This course provides excellent foundational knowledge of the CrossFit methodology, nutrition, programming, coaching dialogue, and workouts.

Once an individual has gained the required\* credential to coach at an affiliate, there are many pathways for development over time. As an affiliate owner, you will most likely experience two entry pathways for coaches at your affiliate:

#### 1. *The development of a new trainer*

In this instance, you are hiring a trainer who has not yet started their CrossFit coaching career. They could be a member of your affiliate who has expressed interest in coaching, or they could be a new hire from outside your member base.

#### 2. *The assessment of a trainer who already has a CrossFit coaching credential*

Many affiliate owners will hire CrossFit trainers from outside their organization. In this instance, the trainer has previous CrossFit coaching experience at another affiliate or organization. You will need the tools to evaluate and interview this individual to see if they are a good fit for your team.

The following section contains a suggested pathway for a trainer to progress from curious about the profession to Certified CrossFit Trainer (CF-L3). Use this pathway to give your trainers a plan for development. We also include a section on elements to consider when hiring new trainers for your affiliate.

*Note: Individuals who do not have a current CrossFit training credential are not permitted to coach at a CrossFit affiliate or use the designation of CrossFit trainer. This includes a non-credentialed coach working under the supervision of a credentialed CrossFit trainer.*

## Sample Development Pathway for CrossFit Coaches

### Prior to Earning the CrossFit Level 1 Coaching Credential

Consider the following questions for individuals who have expressed interest in becoming a coach at your affiliate:

- Why do they want to become a trainer? What is their driver for wanting to become a trainer? Does this fit with the needs of your business?
- Have they practiced the CrossFit methodology for three to six months?
- Have they read the [CrossFit Level 1 Training Guide](#)?
- Have they practiced or experimented with CrossFit nutrition and lifestyle recommendations?

#### **Trainer Action:**

Have the coaching candidate sign up for a CrossFit Level 1 Course.

Once these trainers have received their L1 Certificate, we recommend a structured development pathway under your tutelage. A sample journey from beginner to experienced is provided below.

### **Beginner: 0-6 Months (100+ hours)**

Aim to give this newly credentialed trainer lots of experience in one-on-one and small group coaching environments so they can build confidence, experience, and rapport while staying on track with their development. The small group training environment provides the perfect landscape for this.

It goes without saying, but we do not recommend throwing new trainers into leading group classes immediately after completing the CrossFit Level 1.

The newly credentialed trainer should begin coaching at your affiliate in one or a few of the following ways:

- One-on-one coaching (private training, introductory sessions)
- Shadow or co-coach alongside an experienced coach
- Small group coaching (< 5 athletes)

Coaches in this phase should:

- Read and reread the Level 1 Training Guide frequently.
- Develop the ability to write a lesson plan.
  - Encourage them to take the [Lesson Planning Course](#).
- Begin to understand and analyze programming.
  - Encourage them to take the [Programming Course](#).
- Practice coaching movements and delivering material outside a one-on-one or small group training session.

**Trainer Actions:**

- Take the Lesson Planning Course.
- Take the Programming Course.

**Suggested time/hours spent in this area: 100+ hours**

**Intermediate: 6 Months - 2 Years (400-650 hours)**

The aim for the intermediate trainer is to develop a more nuanced understanding of the needs of each athlete they work with. Often, this will coincide with trainers developing the ability to coach groups of six to 15 people. Trainers in the intermediate phase should reflect on and analyze the effectiveness of each coaching session and look for ways to improve.

Trainers in this phase should:

- Be able to handle classes of six to 15 individuals.
- Create a plan for continuing education classes such as in-person and online courses.
- CrossFit offers an extensive library of [online courses](#) as well as many in-person [preferred courses](#).
- Select two to three courses that are of special interest or that address an area you or the trainer feel is most in need of development.
- Take the CrossFit Level 2 Course.
- Receive opportunities to create workouts and analyze programming. They can create workouts for themselves or their one-on-one clients. Programming can be analyzed after each workout is completed. Alternatively, trainers can analyze your affiliate's programming and then create sample weeks to follow what has been previously programmed.

**Trainer Actions:**

- Sign up for and take the CrossFit Level 2 Certificate Course
- Sign up for and take 2-3 online or preferred partner courses

**Advanced: 2-5 Years (300-700 coaching hours per year)**

The aim for the advanced trainer is to prepare and study for the Certified CrossFit Trainer exam. The Certified CrossFit Trainer (CCFT) credential is for an experienced trainer who wants to demonstrate a higher level of CrossFit coaching knowledge and ability. The purpose of the CCFT is to ensure an individual possesses the knowledge and competency required to coach clients safely and effectively.

To attain this credential, individuals must meet all eligibility requirements, pass the CCFT examination, and commit to a long-term standard of professional accountability. This includes completing continuing education, which can be accomplished by taking CrossFit courses, approved third-party courses, and more. The CCFT credential is accredited by the American National Standards Institute.

Trainers in this phase should:

- Calculate the number of coaching hours needed to be eligible to take the CCFT examination.
- Download the CCFT study material. Identify areas where they are strong and areas where they are weak.
- Set aside scheduled study time for exam preparation.

**Trainer Actions:**

Sign up for and take the CCFT exam.

The above sections are one sample development pathway for trainers at your affiliate. We encourage you to help your trainers view their coaching career as an ongoing process of learning and refinement. Encourage them to seek out additional coaching and training opportunities, whether it be through internships, courses, self-study, or mentorship, as the coach's journey never ends.

## Considerations When Hiring a New Coach

The process of hiring a new coach should not be taken lightly. We encourage you to stay ahead of the process so you can plan, find the right person for your business, and offer them a professional plan for development.

When searching for or interviewing potential coaches, begin by finding out their goals and aspirations personally and professionally. Engage the potential hire in conversation so you can understand whether they are looking for short-term or long-term employment, full-time or part-time employment, what their coaching ambitions are, and what's included in their CrossFit background. These items and more will be paramount to your determination of whether they are a good fit for your affiliate community and the needs of your business.

## Support

CrossFit Training and Education is delighted to help you develop a great coaching staff at your affiliate. If you have questions along the way, we're here to help. Reach out to us at:

[edu\\_direct@crossfit.com](mailto:edu_direct@crossfit.com)

Playbook Resource Center:  
**Coaching Resources**



# SUPPORT FROM CROSSFIT HOME OFFICE

Once you've completed the application and review process, you can officially move forward with your CrossFit affiliate. You'll be working with the CrossFit Affiliate Support team the entire way.

We also have an [Affiliate Help Center](#) that may already have the answers to your questions. Check out our series of articles that cover a variety of frequently asked questions. It's currently available in six languages with more coming!

If you have any additional questions, email us at [affiliatesupport@crossfit.com](mailto:affiliatesupport@crossfit.com).

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## Navigating the Affiliate Portal

- [Where to find it](#)
- [How to use it](#)
- [What to do there](#)

## Staying in Touch

- [Affiliate Help Center](#)
- Email [affiliatesupport@crossfit.com](mailto:affiliatesupport@crossfit.com)
- [Contact CrossFit](#)
- [Contact Your Field Leader or Country Manager](#)

# REFERENCES

## External Links & Research Articles

- [Simon Sinek - Sharing Company Values](#)
- [James Franklin - Core Values](#)
- [How To Develop Your Business Core Values](#)
- [Affiliate Insurance Requirements](#)
- [EPA Disinfectant Guidelines](#)
- [How To Start an LLC](#)
- [How To Choose the Best Legal Structure for Your Business](#)
- [SBA 504 Loan/Fixed Assets](#)
- [SBA \(7a\) - Equipment Loan](#)
- [ADA Compliance & Regulations](#)
- [Web Content Accessibility Guidelines](#)
- [Business Plans: 20 Key Things You've Got To Know](#)
- [Managing Partnership Agreements](#)
- [Choose a Business Structure](#)
- [Assets, Liabilities, Equity: An Intro to the Accounting Equation](#)
- [Partnership Operating Agreements](#)
- [How To Read a Balance Sheet](#)
- [Business Risk Assessment](#)
- [Sample Risk Assessment Checklist](#)
- [IRS - Employee vs. 1099 \(Independent Contractor\)](#)
- [The New One-Minute Manager](#)
- [8 Key Tactics for Developing Employees](#)
- [Managers Can't Be Great Coaches All by Themselves](#)
- [How Humble Leadership Really Works](#)
- [Enhancing Your SEO Through Blogging](#)
- [What Is SEO and How Does It Work](#)
- [SEO for Beginners](#)

## Resource Center Documents

- [Core Values](#)
- [Culture, Community, & Member Experience](#)
- [Building Your Business](#)
- [Opening Roadmap](#)
- [Build-Out](#)
- [Partnerships](#)
- [Financial Planning](#)
- [General Operations](#)
- [Staffing](#)
- [Branding](#)
- [Marketing](#)
- [Member Retention](#)
- [Coaching](#)
  - [What Makes a Great Coach?](#)
  - [Certified CrossFit Trainer Candidate Handbook](#)
  - [CrossFit Level 1 Training Guide](#)
  - [CrossFit Level 2 Training Guide and Workbook](#)
  - [Coach Evaluation Worksheet](#)
  - [Lesson Planning Course](#)
  - [Programming Course](#)
  - [CrossFit Online Courses](#)
  - [CrossFit Preferred Courses](#)
- [Affiliate Help Center](#)

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