

## Assessor Marking Guide

<b>Programme Name</b>	<b>Health and Fitness Coach (Personal Trainer) (Level 4)</b>	
<b>Assessment Number</b>	<b>06A1</b>	
<b>Assessment Title</b>	<b>Personal Training Business Plan</b>	
<b>Course Number</b>	<b>Course 6</b>	<b>Version 2 Level 4 Credit 10</b>
<b>Course Title</b>	<b>PT as a Business</b>	

**This assessment leads to the following graduate profile and learning outcomes.**

<b>NZQA GPO</b>	<b>Learning Outcome</b>	<b>Task #</b>
GPO 6: Use marketing and business tools and techniques to support business practices as an exercise professional. (10 credits)	<b>LO6.1</b> Produce a business plan relevant to a personal training programme, showing evidence of budgeting skills, awareness of tax responsibilities and deductions, legislation and relevant marketing strategies (including social media). (7 credits)	<b>Tasks 1, 2, 4, &amp; 5</b>
	<b>LO6.2</b> Demonstrate an awareness of their business target markets and the use of appropriate selling techniques for relevant products and services. (2 credits)	<b>Task 3</b>
	<b>LO6.3</b> Demonstrate an awareness of the client consultation process and techniques to maximize client satisfaction. (1 credit)	<b>Task 3</b>

<b>NZQF Level 4 Descriptors</b>	
<b>Knowledge</b>	<ul style="list-style-type: none"> <li>Broad operational and theoretical knowledge in a field of work or study</li> </ul>
<b>Skills</b>	<ul style="list-style-type: none"> <li>Select and apply solutions to familiar and sometimes unfamiliar problems.</li> <li>Select and apply a range of standard and nonstandard processes relevant to the field of work or study.</li> </ul>
<b>Application</b>	<ul style="list-style-type: none"> <li>Self-management of learning and performance under broad guidance.</li> <li>Some responsibility for performance of others.</li> </ul>

### ADMINISTRATION

**Assessors are required to provide feedback to students:**

- Constructive feedback to the student must be documented within assessment evidence. Including where resubmission is required.
- Notes on demonstrated performance and application of skills, knowledge, attributes; future improvement/development planning e.g., task management, study skills; relationship to other programme content and use in career.

**Student evidence must be assessed against all specified criteria to meet learning outcomes.**

- Any adaption in assessment methods must be documented and attached to the assessment by the assessor (where deemed necessary to be fair and transparent in relation to student's specified needs).
- Assessment Pack Cover should be dated and signed by assessor when the student has received the final result.
- Assessment opportunities must be indicated accurately.  
Where any practical criteria are not achieved, an additional practical sheet must be used for reassessment for all practical outcomes and attached to this assessment pack. Refer to Assessment opportunities policy for additional detail.
- The student must sign the post-assessment agreement after receiving final result.
- It is the Assessors responsibility to ensure all relevant documentation is included in the assessment prior to reporting and filing.
- Samples of assessments will be forwarded to internal and/or external parties for moderation as required.

Where appropriate **sample answers and or exemplars** may be included: Sample answers are a guide only providing an example of the sufficiency of qualitative and quantitative evidence the assessor could expect to see.

<b>ASSESSMENT SCHEDULE</b>	
<i>Give feedback to student on successes, for N add a note to the student on here or on their assessment evidence (e.g. in Turnitin) about how to improve for resubmission.</i>	
<b>Task Evidence</b>	<b>Achievement Criteria / Judgement</b>
Task 1 SWOT analysis	<p>Learner has provided a complete SWOT analysis including at least two (2) points for each section: Strength, Weaknesses, Opportunities, and Threats relating to their business.</p> <p><b>A good amount of information can be found in the Business course on the LMS, but students may also further research on the internet or asking other business owners.</b></p> <p><b>Strengths could include Having background in service industry, background in fitness industry, personal experiences with fitness journey, knowledge beyond level 4 personal training, time management skills, experience managing or coaching other people, personal health issues or injuries that may make them more relatable, business skills or previous study or experience in business/marketing, and other strengths relevant to personal training or running a business.</b></p> <p><b>Weaknesses my include lack of strengths highlighted above – inexperienced with certain types of training, no further education, inexperienced with communicating with people etc.</b></p> <p><b>Opportunities include further training/qualifications available (e.g., certificate in exercise level 5), work experience, moving to a different city or country to get access to a better market</b></p> <p><b>Threats could include – over saturated market in area, financial issues, health restrictions, new laws coming out about fitness industry, communication issues, having to keep up with new technology such as AI generated fitness programmes</b></p>
Task 2 Competitor analysis	<p>a) Three (3) competitors have been identified and an overview of their services/products has been provided</p> <p>Answers will vary as learners are based all around the country – ideally they look at other competitors in their local area or province for those in more rural locations. Competitors may include individual personal trainers or businesses such as large commercial gyms or family-owned independent gyms.</p>

	<p>An example for one competitor may look like this:</p> <p>A competitor in my local area is “Coach Tane Fitness – Boxing and hypertrophy” this is a gym based in the Rolleston area in Christchurch. Tane runs the gym which provides boxing classes and access to a gym for other workouts. Members get a monthly programme, access to boxing classes, or you can do a 6-week challenge to build muscle and lose weight. With the special 6 week challenge you also get things like body composition analysis and help with nutrition.</p> <p>b) At least one (1) relevant strength with a short explanation of the benefit has been provided for each competitor</p> <p>There are a lot of strengths with this gym (Coach Tane) – it looks like a great team environment and a fun way to lose weight and get fit. There are personal trainers available during the classes and you also get a lot of extras like body composition analysis. Also the website is quite good and explains what you get quite well in the membership – though I noticed that the class timetable is not available to look at on the website.</p> <p>c) At least one (1) relevant weakness for each competitor is identified. A short explanation of the impact this would have on each competitor has been provided.</p> <p>A weakness would be that if you don’t like group training, he does not seem to have just one on one personal training sessions and if I was signing up I would want to know when the classes would be held, this info is not on the website. Also, the 6 week challenge is quite expensive – it is \$350 for 6 week, but it is mostly group based fitness classes.</p>
<p>Task 3 Marketing and Service standards</p>	<p>a) 100 words provided describing the type of trainer the learner wants to be, their personal brand, and at least two USPs – these may be future qualifications the learner plans to complete.</p> <p>Answers will vary. The learner may bring back some of the Strengths and Opportunities they mentioned in Task 1 to help with describing their unique selling points. They may even point out that most trainers in their area do not have a PT qualification, so this would be a USP for them once they have graduated. They may provide a bit of background into their goals and ethics as well</p> <p>b) Learner has identified and described at least four (4) marketing methods and explained briefly how they will use each methods. <b>150 – 200 words.</b></p> <p>For each marketing method provided, the learner must also explain what they are going to do, they cannot simply write “create a website” – they may add something like the following: I will create a website using Wix which is a free website creator, and I will ask a friend who has a background in web design to help with the layout and images. I will also look at what other personal training websites and what they are doing for inspiration.</p> <p>c) Learner has explained how they will use service standards during their initial consultation and training block with their clients.</p> <p>Learners may talk about service standards including aspects such as:</p> <ul style="list-style-type: none"> <li>• accuracy – the client is actually getting what you market yourself as</li> <li>• transparency – you are honest with your client about pricing, workout methods, and your scope of practice as a PT,</li> <li>• friendliness</li> <li>• effective listening</li> <li>• time management</li> <li>• efficiency</li> <li>• other standards related to provided exceptional service to the client</li> </ul> <p>They must talk about at least 3.</p>
<p>Task 4</p>	<p>a) Learner has completed and uploaded the financial forecasting excel spreadsheet to their assessment submission. Forecast demonstrates a reasonable/realistic forecast for a new personal trainer in the first 3 months of business.</p> <p>Learners are provided with a locked template that they must enter in the values and information such as their services and expenses. There is an example and a key provided to them on the other sheets.</p>

	<p>b) i. Learner has filled in the template with the figures they have gathered from the PAYE website.</p> <p>For example, if the learner estimates that they will earn \$10,000 taxable income in the first 3 months, then in one year they may enter \$40,000 as their total income.</p> <table border="0"> <tr> <td><b>Gross Pay</b></td> <td style="text-align: right;">40,000.00</td> </tr> <tr> <td><b>PAYE (tax)</b></td> <td style="text-align: right;">5,500.00</td> </tr> <tr> <td><b>ACC</b></td> <td style="text-align: right;">612.00</td> </tr> <tr> <td><b>KiwiSaver</b></td> <td style="text-align: right;">1,200.00</td> </tr> <tr> <td><b>Student Loan</b></td> <td style="text-align: right;">2,060.64</td> </tr> <tr> <td><b>Take Home Pay</b></td> <td style="text-align: right;">30,627</td> </tr> </table> <p>ii. Learner has outlined their plan to meet legal obligations for tax purposes, money to set aside, and other business software or professionals they may use. <b>Minimum 100 words</b></p> <p>Example answer –</p> <p>Learner has outlined legal obligations:</p> <p>My legal obligations are to pay approximately \$5,500 in tax to the inland revenue department. I will need to complete an IR3 form at the end of the financial year which will include my gross income and all business expenses.</p> <p>Plan to save money:</p> <p>I plan to set aside the following amount per week (on average) \$100 for tax, \$10 for ACC, \$25 for kiwisaver, and \$40 for student loan.</p> <p>Additional business resources:</p> <p>I plan to hire an accountant – my dad has a business as well and using a local accountant in the Christchurch area, they charge \$600 per year to complete your IR3.</p>	<b>Gross Pay</b>	40,000.00	<b>PAYE (tax)</b>	5,500.00	<b>ACC</b>	612.00	<b>KiwiSaver</b>	1,200.00	<b>Student Loan</b>	2,060.64	<b>Take Home Pay</b>	30,627
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Task 5	<p>a) Learner has provided a short background of what got them interested in a career in personal training and their future aspirations.</p> <p>An example answer from a previous learner:</p> <p>I am in my final stages of my master’s thesis, where my research interests encapsulate immunological treatments for late-stage brain cancers, namely glioblastoma multiforme. For the past few years, I have found great reprieve at the gym and developed a greater sense of confidence and self-improvement. I am an avid member of the Les Mills community and can often be found at the Newmarket club reception.</p> <p>I hope to encourage and bolster motivation for my clients, to best support their experience with the gym and exercise. I want to help create healthy habits that are enjoyable, fit within your life, and freeing. I can help set realistic and achievable goals, that are gratifying to work towards.</p> <p>b) Learner has described the services they will sell including details such as the types of sessions, classes, programmes, or other services they intend to sell upon graduating. Scope of practice has been considered.</p> <p>I plan to sell mostly one on one and partner personal training sessions out of Les Mills New Market, and I am also keen to work as a group fitness instructor as an employee of Les Mills. I would also like to sell package deals that include programmes for my clients.</p> <p>c) Learner has outlined their ideal target audience.</p> <p>My main target audience is women aged 18 – 65 years old who specifically want to gain strength and confidence in the gym environment. Those who have weight loss goals can also come to me for support with their training.</p> <p>d) Learner has provided a one sentence vision/mission statement. The statement communicates the general goals and aspirations of their business and what sets them apart from other PT businesses.</p> <p>I aim to help provide realistic and holistic fitness programmes that are personalised to your lifestyle and encompass the values of Hauora; Exercise is a tool that we can use to not only improve physical health but enhance mental wellbeing and overall quality of life.</p>												

	<p>e) Learner has presented two (2) short-term SMART goals for their business and briefly outlined how they will achieve them.</p> <p>My goals remain broad for the following 12 months, as there is more professional development to be completed at the club I currently work. Moreover, I am still a full-time researcher, and my availability fluctuates based on external timelines and commitments. Therefore, my SMART goals are as follows:</p> <ol style="list-style-type: none"><li>1. Strong client base – 10 regular (weekly) clients – 8-10 months, as I am a full-time student, I don't have regular hours to commit;</li><li>2. Enhance expertise and qualifications –within 12 months, purchase and complete the Girls Gone Strong Women's coaching specialist certification.</li></ol>
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**06A1 Personal Training Business Plan exemplar to be added after first run of assessment**