



## **Intake Procedures, Tips & Suggestions**

A new student intake, usually done during a Introductory Session, can take on many forms depending on the student, your particular teaching style and expertise and what information you feel is pertinent beyond the basic format.

Listed below are simple guidelines you can follow to keep your intake on track, gather relevant information and set you and your client up for success.

### **Forms:**

1. Movement/Medical History Questionnaire & Release Form
2. Postural Analysis Sheet
3. S..O.A.P Notes
4. Welcome packet: Welcome Letter (How To Practice), Studio Policies & Schedule

### **Filling out forms:**

The Movement/Medical History Questionnaire & Release Form can either be filled out in the studio – you should request the student show up 10-15 minutes early for that – or you can email them the documents (they exist on the studio computer) and have them fill them out at home. This way they don't have to come more than 5 minutes early.

***I would recommend you set a standard from the beginning for your students to show up at the studio 5-10 minutes early for every session/class.***

### **Intake Procedures:**

**1. Student fills out intake:** (in studio or before)

**2. Tour of studio:** water, bathrooms, where to put shoes/bags etc., importance of cell phones OFF and voices low.(2 -5 min)

**3. Review the intake** with the student: (5-8 min)

- Focus on past injuries, movement experience/current program & GOALS!
- Reiterate goals (short term and long term) to the student to clarify where they want to go in their practice.

**4. Postural Analysis:**

- Standing postural analysis –
  - You should do at least a simple postural analysis in order to see what the body in front of you looks like in its most functional posture (standing). This can be a basic

landmark alignment scan to see where there are deviations. This is helpful later when you watch them move because you can compare and contrast and draw connections & relationships.

- Moving postural analysis elements you can include for a more in-depth postural analysis are: watching them walk, rolling down from standing, side-bending from standing, head/neck ROM (nodding & turning rt/lft), arm/shoulder circles, hamstring length, other muscle testing (quad/psoas, abdominal strength).

***Much of this will be revealed during the movement experience portion of the intake, so you should decide what formula best suits your style.***

### **5. Movement Experience: (40 min)**

- Introduce 2-3 basics: posterior/lateral breathing, neutral (pelvic clocks), deep abdominal engagement.

- Introduce 2-3 Fundamentals: **Use the 12 Fundamentals** that we've established and coincide with the Fundamentals videos. This way they can use the videos as a homework resource after their session. ***(This is important to for them to begin to integrate and feel supported on their journey. It also keeps us in their attention if they are deciding whether or not to sign up for a package!)***

- Experience on 2-3 pieces of equipment exploring a variety of ranges of motion and any exercise that is relevant to their goals or current challenges.

- Wow exercises: Give them a couple of exercises that will knock their socks off and **keep them safe**. I.e. Pull-ups on the chair, long stretch on the reformer, teaser on the trap table, short-box side bend (mermaid).

### **6. Q & A/Invitation: (10 min)**

This is an important part of the experience for the client. It's an opportunity for you to answer any questions they have, clarify, encourage and help them see how Pilates can help them attain their goals. Draw relevant connections between their goals and exercises you've done with them to demonstrate how powerful a tool Pilates is.

**\*\*INVITE THEM TO WORK WITH YOU!** This is so key. You are the expert, you establish authority by reporting what you see and how you can help them reach their desired goals and **YOU MAKE A RECOMMENDATION!**

You want to establish a protocol for practicing Pilates i.e. "What we encourage all of our students to do is establish a strong foundation (learning what modifications/variations are needed to keep them safe and moving toward their goals) and then move into small group trios or group classes coupled with a consistent home practice. This way you can practice 2-3 times a week and get the absolute most out of your workouts.

You want your invitation to reflect their goals, and the programming of the studio:

1. Home practice
2. Trios/group classes
3. Working with multiple teachers

4. Owning their own practice
5. Practice for the long term!

... and what you see as powerful motivators for them: getting out of pain, restoring joy, getting stronger, etc.

Invitation examples:

“I would love to work with you to a, b & c...”

“I think Pilates will really be able to address a, b & c...”

“The wonderful thing about Pilates and the studio is that we want you to practice for the long term and we do all we can to support you in that. In this way you have a tool for preventing injury, feeling progressively strong and more vital in your body and creating a foundation of strength for all the years ahead of you.”

**7. Sign-up or Follow-up:**

At this point you will either sign them up for their 5 pack and set your next appointment or you will set a follow-up conversation or email.

***Giving students a welcome packet to take home with them is a great way to reinforce what you've discussed. Make sure they are familiar with any online resources, how to schedule, your policies etc before they leave. It is also a good idea to give them at least 2-3 Fundamental exercises to work on.***