PT software implementation checklist

Phase 1 - Buyer prep

Done	Action	Why it matters	Timing
'	Map every friction point in the current setup	You need real workflow problems before you compare vendor claims.	Before demos
'	Define the coaching model: solo, hybrid, or studio	This prevents a mismatch between business type and software depth.	Before demos
'	List the must-connect systems	Bookings, billing, reminders, notes, and packages should not live in separate truths.	Before demos
'	Model pricing at current size and at 2x growth	Cheap entry pricing can become expensive when the roster or team grows.	Before demos
'	Check branded app and	These fees often change	Before demos
'	add-on costs	the real monthly total.	
'	Review privacy, payments, and staff access controls	The draft makes clear that PT businesses handle sensitive client and billing data.	Before final shortlist
'	Shortlist two to three finalists only	A tight shortlist makes side-by-side testing easier and cleaner.	Before final review

Phase 2 - Setup and migration

Done	Action	Why it matters	Timing
'	Export and clean client records	Migration goes faster when duplicates, old notes, and dead packages are cleaned first.	Week 1
'	Set package rules, memberships, and billing logic	This protects revenue and prevents booking access from drifting out of sync.	Week 1
'	Build trainer schedules and availability	Scheduling breaks quickly if staff calendars are vague at launch.	Week 1
'	Turn on reminders, renewals, and failed-payment retries	Automation is one of the clearest business wins in the draft.	Week 1
'	Upload core exercise content and key videos	Clients need a reliable first version of the service, not a half-built library.	Week 1-2
'	Configure staff roles and permissions	Studios need people to see what they need without exposing everything.	Week 1-2
'	Test the mobile experience end to end	Most clients will experience the platform on their phone, not on a desktop.	Week 1-2
'	Run an internal booking and payment test	This catches small workflow failures before they hit real clients.	Week 2

Phase 3 - Go-live and first 90 days

Done	Action	Why it matters	Timing
'	Pilot with a small group of clients first	A soft launch surfaces issues without exposing the whole roster at once.	Go-live week
'	Send a clear client transition message	Clients need to know where to book, where to pay, and where to find workouts.	Go-live week
'	Track no-shows, payment recovery, and rebooking	These are the first operating signals that show whether the switch is helping.	First 30 days
'	Collect staff pain points weekly	The team will surface friction that buyers do not spot in a demo.	First 30 days
'	Review support responsiveness against real issues	Onboarding quality is part of the product, not a side service.	First 30 days
'	Tighten templates, check-ins, and update alerts	Optimization starts after the system is stable enough to trust.	Days 31-60
'	Review retention and package renewal patterns	The platform should make continuity easier, not just admin faster.	Days 31-90
'	Decide what to expand next: app branding, more automation, deeper reporting	Once the base system works, add the higher-value layers with confidence.	Days 61-90

5-stage PT software selection flowchart

A visual version of the draft's selection framework for buyers and editors.

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Start with the business, not the feature list
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Stage 1 - Map workflow friction

List where the current setup breaks: lost notes, weak follow-up, booking confusion, payment issues, or manual admin that keeps coming back.

Stage 2 - Match the platform to the coaching model. What business are you running now?

Solo trainer

Needs low-drag basics: programming, payments, scheduling, messaging, and clean mobile access..

Hybrid coach

Needs continuity between sessions: video, check-ins, habits, recurring billing, and app delivery.

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Yes

Stage 3 - Evaluate integration depth. Do bookings, billing, reminders, and client records actually talk to each other?

No

Still a stack, not a system. Remove from shortlist

Stage 1 - Map workflow friction

Model the cost at today's size and at 2x growth. Check client caps, trainer caps, branded app fees, add-ons, and tools you would still need.

Stage 1 - Map workflow friction

Ask how migration works, how quickly the team will get trained, and what help looks like during a busy week after go-live.

Decision - Demo finalists, score the fit, and choose the platform that reduces daily drag now and at the next stage of growth.

PT software implementation pack