Learner workbook

NCFE Active IQ Level 3 Diploma in Gym Instructing and Personal Training QN:603/4388/6

Learner name: .....

Centre number: .....

Centre name: .....

Tutor name: .....

Start date: .....

Signatures

Learner: .....

Assessor: .....

Internal quality assurer (IQA)*: .....

External quality assurer (EQA)*: .....

*for completion if part, or all, of the evidence has been sampled by the internal and/or external quality assure

Unit 02

Maximising the customer experience in a gym environment

(A/617/4002)

Overview

The unit aims to provide learners with the knowledge, skills and understanding to build and maintain relationships with customers in a gym environment.

This booklet allows opportunities to provide evidence for assessment criteria 1.1 to 6.6. To support your evidence, the following websites may support you with some important information to complete the tasks:

- www.acsm.org
- www.fitnessindustryeducation.com
- www.bases.org.uk

Supporting evidence

Ensure that all the evidence is available for viewing by the Internal and External Quality Assurer.

Unit 02 Workbook

After completing your assessment, please return it to your tutor.

Advice to all learners

- please complete your personal details and learner declaration below
- complete all questions in this assessment
- write your answers in the spaces provided
- add any additional work for any of the questions on plain paper and attach to this assessment
- if you need guidance or assistance, please contact your tutor

Learner declaration

I have completed all sections of this assessment and I confirm that this is my own work.

Signature: .....

Date: .....

Assessor: .....

IQA: .....

Achieved: ☐

Not yet achieved: ☐

Learning outcome 1

Understand customer service in a gym environment

Task 1: Using the table below, compare the products and services on offer at a minimum of two different organisations

Include: different types of organisations, ie national gym groups, local organisations, independent gyms/leisure centres or small providers etc. **(1.1)**

Organisation Type	Product/Service offer
Comparisons	

Task 2: Using the organisations identified in Task 1, describe the local demographics of different organisations and how this affects the products and services offered (1.2)

Task 3: Describe the customer expectations of the different organisations you have identified in Task 1 (1.3)

Organisation	Description

Task 4: From the organisations you have identified in the previous tasks, describe the typical journey a customer might take at each one (1.4)

Tip: think about the customer journey at your own organisation, or one you are familiar with

Organisation	Customer journey

Task 5: Describe the methods used to build support, inclusion and retention at the organisations you have previously identified (1.5)

Method	Organisation	Description
Support		
Inclusion		
Retention		

Evidence sheet

Assessment criteria	Assessor comments
1.1	
1.2	
1.3	
1.4	
1.5	

Assessor signature:	
IQA signature:	
Date:	

Learning outcome 2

Understand customer engagement in a gym environment

Task 1: Describe the different methods used to engage with customers in a gym environment (2.1)

Communications method	Description

Task 2: Describe the different methods used to build rapport in order to maximise customer experience and retention (2.2)

Population	Method	Description
Older people (50+)		
Ante/postnatal		
Disabled people		
Young people (14-16)		

Task 3: Describe ways to support a safe and enjoyable fitness environment for customers (2.3)

Task 4: List the ways to present yourself in a professional and approachable manner to customers (2.4)

Task 5: Identify different types of customer conflict and how you can manage them (2.5)

Customer conflict	Conflict resolution technique

Task 6: Describe the importance of customer retention (2.6)

Evidence sheet

Assessment criteria	Assessor comments
2.1	
2.2	
2.3	
2.4	
2.5	
2.6	

Assessor signature:	
IQA signature:	
Date:	

Learning outcome 3

Understand customer communication in a fitness organisation

Task 1: Using the table below, describe the following components of communication: (3.1, 3.2)

a. different types of communication techniques
b. when to use different types of communication techniques
c. how to adapt communication methods to meet the needs of different customers

Types of communication techniques (eg verbal)	When to use different types of communication (eg complaints)	How to adapt communication methods (eg cultural)

Task 2: Explain the importance of walking the gym floor (3.3)

Evidence sheet

Assessment criteria	Assessor comments
3.1	
3.2	
3.3	

Assessor signature:	
IQA signature:	
Date:	

Learning outcome 4

Understand customer feedback in a fitness organisation

Task 1: Describe the importance of obtaining customer feedback (4.1)

Task 2: Identify ways to record and report customer feedback (4.2)

Tip: consider the organisations you used for learning outcome 1

Task 3: Explain the importance of managing feedback in line with an organisation's procedures (4.3)

Tip: consider the organisations you used for learning outcome 1.

Evidence sheet

Assessment criteria	Assessor comments
4.1	
4.2	
4.3	

Assessor signature:	
IQA signature:	
Date:	

Learning outcome 5

Understand national legislation, guidelines and organisational procedures

Task 1: Describe national legislation and guidelines relevant to the role of a gym instructor (5.1)

Legislation and guidelines	Gym Instructor example	Description
Data protection and client confidentiality		
Health and safety at work		
Conflict of interest		
Disclosure and barring service (DBS)		
Safeguarding children and vulnerable adults		
Equality and diversity		
Personal liability insurance		

Legislation and guidelines	Gym Instructor example	Description
Control of substances hazardous to health (COSHH)		

Reporting of injuries, diseases and dangerous occurrences regulations (RIDDOR)		
Electricity at work regulations		
First aid regulations		

Task 2: Using the organisations identified in learning outcome 1, describe the organisational procedures relevant to the role of a Gym Instructor. (5.2)

Task 3: Describe the purpose of a storage plan and how to create one. (5.3)

Task 4: Explain the health and safety implications of assembly, dismantling, hygiene and storage of equipment (5.4)

Activity	Example	Explanation
Assembly		
Dismantling		
Hygiene		
Storage		

Task 5: Explain the practical implications of not following manufacturers' guidelines (5.5)

Task 6: Using the organisations from learning outcome 1, identify where operating procedures, policies and manufacturers' guidelines can be located (5.6)

Task 7: Explain manual handling requirements in relation to the role of a Gym Instructor (5.7)

Evidence sheet

Assessment criteria	Assessor comments
5.1	
5.2	
5.3	
5.4	
5.5	
5.6	
5.7	

Assessor signature:	
IQA signature:	
Date:	

Learning outcome 6

Understand routine maintenance and cleaning in a gym environment

Task 1: Identify the cleaning resources commonly used in a gym environment (6.1)

Cleaning resources	Examples	Uses and suitability
Equipment		
Cleaning substances		

Task 2: Describe the standard operating procedures (SOP) for routine maintenance and cleaning (6.2)

Task 3: Create a risk assessment to identify the possible hazards in a fitness environment in relation to the below: (6.3)

- activity areas and gym
- people
- physical risks

Note: ensure you include this risk assessment as part of your completed workbook when submitting to your Tutor/Assessor.

Task 4: Explain the cleaning routines and organisational standards relevant to the gym environment (6.4)

Task 5: Describe how to maintain the safety of yourself and others (6.5)

Task 6: Identify the different types of waste found in a gym environment and how to dispose of it (6.6)

Cleaning resources	Examples	Uses and suitability
Hazardous		
Non- hazardous		

Evidence sheet

Assessment criteria	Assessor comments
6.1	
6.2	
6.3	
6.4	
6.5	
6.6	

Assessor signature:	
IQA signature:	
Date:	

Unit 03

Supporting client health and well- being

(D/617/4008)

Overview

The unit covers the knowledge and understanding that an instructor needs to plan safe and effective group cycling sessions.

This booklet allows opportunities to provide evidence for assessment criteria 1.1 to 3.3.
To support your evidence, the following websites may support you with some important information to complete the tasks:

- www.acsm.org
- www.fitnessindustryeducation.com
- www.bases.org.uk

Supporting evidence

Ensure that all the evidence is available for viewing by the internal and external quality assurer.

Unit 03 Workbook

After completing your assessment, please return it to your tutor.

Advice to all learners

- please complete your personal details and learner declaration below
- complete all questions in this assessment
- write your answers in the spaces provided
- add any additional work for any of the questions on plain paper and attach to this assessment
- if you need guidance or assistance, please contact your tutor

Learner declaration

I have completed all sections of this assessment and I confirm that this is my own work.

Signature: .....

Date: .....

Assessor: .....

IQA: .....

Achieved: ☐

Not yet achieved: ☐

Learning outcome 1

Understand lifestyle and health promotion

Task 1: Describe the factors that affect health and well-being (1.1)

Task 2: Describe the current national healthy eating recommendations (1.2)

Task 3: Using the FITT principle, state the current national physical activity guidelines for the following age groups: (1.3)

Age group	Physical activity guidelines
Children	F I T T
Young people	F I T T
Adults	F I T T

Older adults	F I T T

Task 4: Identify the health benefits of physical activity (1.4)

Health benefit	Example
Physical	
Physiological	
Psychological	
Social	

Task 5: Describe how technology can be used to support the customer experience (1.5)

Task 6: Describe how to communicate healthy lifestyle choices to special population clients (1.6)

Special population	Description
Older people (50+)	
Ante/postnatal	
Young people (14-16)	
Disabled people	

Task 7: Identify evidence based/reputable sources of health and well-being advice (1.7)

Evidence sheet

Assessment criteria	Assessor comments
1.1	
1.2	
1.3	
1.4	
1.5	
1.6	

1.7	

Assessor signature:	
IQA signature:	
Date:	

Learning outcome 2
Understand prevention and management of common health conditions

Task 1: Discuss health and exercise statistics for the UK (2.1)

Tip: think about participation levels and the implications of low participation.

Task 2: Describe how physical activity can prevent and manage common health conditions (2.2)

Health condition	Description
Coronary heart disease	
Stroke	
Cancer	
Type 2 diabetes	
Obesity	
Mental health conditions	
Musculoskeletal conditions	

Task 3: Describe the professional boundaries that come with working as a Gym Instructor, as well as the limitations that exist when offering health, exercise and well-being advice (2.3)

Professional boundaries
Limitations

Task 4: Identify other relevant exercise or health professionals that clients can be signposted to for specialist advice (2.4)

Exercise/Health professional	Reason for referral

Learning outcome 3
Understand behaviour change and exercise adherence

Task 1: Describe the stages of change/trans-theoretical models of behaviour change (3.1)

Stage of change	Description
Pre-contemplation	
Contemplation	
Preparation	
Action	
Maintenance	
Relapse	

Task 2: Describe the role of intrinsic and extrinsic motivation when it comes to exercise adherence (3.2)

Motivation	Description
Intrinsic	
Extrinsic	

Task 3: Identify a range of techniques/approaches that can support adherence to exercise (3.3)

Evidence sheet

Assessment criteria	Assessor comments
3.1	
3.2	
3.3	

Assessor signature:	
IQA signature:	
Date:	

Unit 04

Conducting client consultations and gym inductions

(F/617/4003)

Overview

The unit covers the knowledge and understanding that an instructor needs to plan safe and effective group cycling sessions.

This booklet allows opportunities to provide evidence for assessment criteria 1.1 to 4.3.
To support your evidence, the following websites may support you with some important information to complete the tasks:

- www.acsm.org
- www.fitnessindustryeducation.com
- www.bases.org.uk

Supporting evidence

Ensure that all the evidence is available for viewing by the internal and external quality assurer.

Unit 04 Workbook

After completing your assessment, please return it to your tutor.

Advice to all learners

- please complete your personal details and learner declaration below
- complete all questions in this assessment
- write your answers in the spaces provided
- add any additional work for any of the questions on plain paper and attach to this assessment
- if you need guidance or assistance, please contact your tutor

Learner declaration

I have completed all sections of this assessment and I confirm that this is my own work.

Signature: .....

Date: .....

Assessor: .....

IQA: .....

Achieved: ☐

Not yet achieved: ☐

Learning outcome 1

Understand the consultation process specific to gym-based exercise programme planning and own professional role boundaries

Task 1: Describe the importance of client consultations, to include: (1.1)

Gathering relevant information so that an appropriate plan can be devised
Building rapport

Giving information about the range of activities across the facility
Enhancing the customer experience in welcoming the customer to the facility
Meeting legislative responsibilities

Task 2: Describe ways to ensure client confidentiality and adherence with data protection legislation are maintained (1.2)

Method	Description

Task 3: Describe how to cater for individuals with different goals or needs. (1.3)

Task 4: Explain the role and responsibilities of a Gym Instructor (1.4)

Task 5: Identify the information that should be discussed during a client consultation (1.5)

Evidence sheet

Assessment criteria	Assessor comments
1.1	
1.2	
1.3	
1.4	
1.5	

Assessor signature:	
IQA signature:	
Date:	

Learning outcome 2
Understand pre-exercise health screening methods

Task 1: Identify methods of health screening prior to gym-based exercise (2.1)

Task 2: Describe risk stratification models available to Gym Instructors and how to use them to categorise client risk for exercise (2.2, 2.3)

Risk stratification models
Client risk categories

Task 3: Explain when to refer or signpost clients to medical professionals/exercise specialists (2.4)

Evidence sheet

Assessment criteria	Assessor comments
2.1	
2.2	
2.3	
2.4	

Assessor signature:	
IQA signature:	
Date:	

Learning outcome 3

Know a range of health and fitness assessments relevant to the gym-based client

Task 1: Identify a range of health and fitness assessments used to assess clients (3.1)

Health assessment method	**Overview**
Fitness assessment method*	**Overview**

each method must address each component of fitness

Task 2: Describe how to monitor and review client progress (3.2, 3.3)

Evidence sheet

Assessment criteria	Assessor comments
3.1	
3.2	
3.3	

Assessor signature:	
IQA signature:	
Date:	

Learning outcome 4

Know how to induct clients in the gym environment

Task 1: Describe a client induction process (4.1)

Tip: think about the induction process at one of the organisations you have previously used in this workbook.

Task 2: Describe how to carry out a facility walk-through/show round to new and existing customers (4.2)

Task 3: Describe how to adapt inductions for individuals and small groups to maintain effectiveness (4.3)

Evidence sheet

Assessment criteria	Assessor comments
4.1	
4.2	
4.3	

Assessor signature:	
IQA signature:	
Date:	

Unit 05

Planning and reviewing gym- based exercise programmes

(R/617/4006)

Overview

The unit covers the knowledge and understanding that an instructor needs to plan safe and effective group cycling sessions.

This booklet allows opportunities to provide evidence for assessment criteria 1.1 to 2.7.
To support your evidence, the following websites may support you with some important information to complete the tasks:

- www.acsm.org
- www.fitnessindustryeducation.com
- www.bases.org.uk

Supporting evidence

Ensure that all the evidence is available for viewing by the internal and external quality assurer.

Unit 05 Workbook

After completing your assessment, please return it to your tutor.

Advice to all learners

- please complete your personal details and learner declaration below
- complete all questions in this assessment
- write your answers in the spaces provided
- add any additional work for any of the questions on plain paper and attach to this assessment
- if you need guidance or assistance, please contact your tutor

Learner declaration

I have completed all sections of this assessment and I confirm that this is my own work.

Signature: .....

Date: .....

Assessor: .....

IQA: .....

Achieved: ☐

Not yet achieved: ☐

Learning outcome 1
Understand how to plan and tailor safe and effective gym-based exercise programmes for a range of clients

Task 1: Describe client considerations when planning gym-based exercise programmes (1.1)

Population	Description
Young people (14-16)	
Ante/postnatal	

Population	Description
Older people (50+)	

Task 2: Explain how to set goals and objectives for clients as part of a gym-based exercise programme (1.2)

Tip: consider setting goals and objectives using the SMART principle

Task 3: Define the components of health and skill related fitness (1.3)

Health related components	**Definition and example**
Muscular strength	
Muscular endurance	
Cardiovascular endurance	
Flexibility	
Skill related components	**Definition and example**
Agility	
Speed	
Co-ordination	

Balance	
Reaction time	
Power	

Task 4: Explain the principles and variables of fitness training (1.4)

Tip: think about how the principles of fitness impact components of fitness

Task 5: Describe the differences between programming exercise for physical fitness and health benefits (1.5)

Task 6: Explain why and how to regress a training programme (1.6)

Task 7: Describe the effect of speed, posture, alignment and intensity on exercise (1.7)

Variable	Description
Speed	
Posture	
Alignment	

Intensity	

Task 8: Explain the importance of muscle balance when planning programmes (1.8)

Task 9: Explain what you need to consider to ensure a safe and effective warm-up and cool-down is carried out with clients. (1.9)

Warm-up components
Considerations

Cool-down components
Considerations

Task 10: Describe how to minimise any risks relevant to programmes of exercise (1.10)

Evidence sheet

Assessment criteria	Assessor comments
1.1	
1.2	
1.3	
1.4	
1.5	
1.6	

1.7	
1.8	
1.9	

Assessor signature:	
IQA signature:	
Date:	

Learning outcome 2

Understand how to monitor and review safe and effective gym-based exercise programmes

Task 1: Explain the reasons why exercise may need to be deferred for a period of time (2.1)

Task 2: Explain the importance of verbal screening and how to conduct it effectively with clients (2.2)

Task 3: Describe the exercise contraindications and key safety guidelines for working with special populations (2.3)

Special population	Contraindication(s)
Older people (50+)	
Ante/postnatal	
Young people (14-16)	
Disabled people	

Task 4: Compare different methods of monitoring exercise intensity (2.4)

Include: talk test, rate of perceived exertion (RPE), heart monitoring and the use of different heart rate zones

Task 5: Explain how to evaluate the effectiveness of gym-based programmes. (2.5)

Task 6: Explain appropriate engagement with clients (2.6)

Task 7: Explain the value of reflective practice (2.7)

Evidence sheet

Assessment criteria	Assessor comments
2.1	
2.2	
2.3	
2.4	
2.5	
2.6	
2.7	
Assessor signature:	
IQA signature:	
Date:	

Unit 06

Instructing and supervising gym- based exercise programmes

(Y/617/4007)

Overview

The unit covers the knowledge and understanding that an instructor needs to plan safe and effective group cycling sessions.

This booklet allows opportunities to provide evidence for assessment criteria 1.1 to 1.5, 6.1 to 6.5 and 7.1 to 7.5.
To support your evidence, the following websites may support you with some important information to complete the tasks:

- www.acsm.org
- www.fitnessindustryeducation.com
- www.bases.org.uk

Supporting evidence

Ensure that all the evidence is available for viewing by the internal and external quality assurer.

Unit 06 Workbook

After completing your assessment, please return it to your tutor.

Advice to all learners

- please complete your personal details and learner declaration below
- complete all questions in this assessment
- write your answers in the spaces provided
- add any additional work for any of the questions on plain paper and attach to this assessment
- if you need guidance or assistance, please contact your tutor

Learner declaration

I have completed all sections of this assessment and I confirm that this is my own work.

Signature: .....

Date: .....

Assessor: .....

IQA: .....

Achieved: ☐

Not yet achieved: ☐

Learning outcome 1
Understand how to deliver gym-based exercise training sessions

Task 1: Describe the key components of a gym-based exercise session (1.1)

Component	Description
Warm-up	
CV machines	
Body weight exercises	
Resistance machines	
Free weight exercises	
Small equipment	

Component	Description
Functional exercise/equipment	
Flexibility	
Cool-down	

Task 2: Identify suitable training methods and equipment when carrying out gym-based exercise sessions (1.2)

Exercise	Example(s)
Cardiovascular	
Resistance training	

Functional training	
Flexibility, range of motion exercises	

Task 3: Thinking about the examples you provided above, explain how to safely and appropriately use equipment for gym-based exercise sessions (1.3)

Task 4: Describe how to demonstrate training techniques to clients (1.4)

Task 5: Explain how to supervise and monitor clients during gym-based exercise sessions (1.5)

Evidence sheet

Assessment criteria	Assessor comments
1.1	
1.2	
1.3	
1.4	
1.5	

Assessor signature:	
IQA signature:	
Date:	

Learning outcome 6
Understand professional practice requirements of a Gym Instructor

Task 1: Describe, with examples, the purpose of industry codes of practice (6.1)

Task 2: Describe how to work within the scope of practice of a Gym Instructor (6.2)

Tip: be sure to consider special populations as part of your answer

Task 3: Explain the importance of continuous professional development (CPD) for Gym Instructors (6.3)

Task 4: Complete the below professional development plan (PDP) based on where you would like to see your future career progress in the fitness industry (6.4, 6.5)

Tip: if you have a PDP from an employer, you may be able to use this as evidence. Please hand it to your Assessor/Tutor, who will assess its validity.

Professional Development Plan			
Name: Position: Company: Date: Review date:			
Long-term career goals			
SMART short-term career goals *(1-2 years)*			
Area of interest	Required CPD	Qualifications	Date by

SMART medium/long-term career goals *(3-5 years)*			
Area of interest	Required CPD	Qualifications	Date by
Learner signature & date			
Line Manager signature & date			

Evidence sheet

Assessment criteria	Assessor comments
6.1	
6.2	
6.3	
6.4	
6.5	

Assessor signature:	
IQA signature:	
Date:	

Learning outcome 7
Understand business acumen

Task 1: Outline how to financially plan as part of being a self-employed Gym Instructor (7.1)

Task 2: Thinking about the organisations you have previously used, describe their product offers and how they can support secondary spends (7.2)

Task 3: Outline how to develop a digital plan as part of being a self-employed Gym Instructor (7.3)

Task 4: Explain the importance of social media and digital profiles and how to set up and manage them (7.4, 7.5)

Importance of social media and digital profiles
Set up and management

Evidence sheet

Assessment criteria	Assessor comments
7.1	
7.2	
7.3	
7.4	
7.5	

Assessor signature:	
IQA signature:	
Date:	

Well done!

You have completed all the tasks. Hand them in to your tutor for feedback.

Feedback form

Assessment decision

Achieved ☐ **Not yet achieved** ☐

Comments/feedback

Assessor signature:		**Date:**
Learner signature:		**Date:**
IQA signature:		**Date:**
EQA signature:		**Date:**

Contact us

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Version 1.0 February 2020

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