Onboard a New Athlete in Person

Mavilyn Carlos - 2026-10-03 - Onboarding & New Users

When an athlete says yes, your onboarding workflow should be straightforward, take only a few minutes, and help prevent most future login, payment, and booking issues. This guide walks you step by step from **sale to activation to payment to booking**, for when you sell through an introductory conversation.

What complete onboarding looks like

By the end of onboarding, your new athlete should:

- Have an active Kilo login
- Have a payment method on file
- Be assigned to the correct package
- Be charged
- Know how to reserve classes

If all five are done during the intro meeting, you are set up for success. The full workflow in short:

1. Make the sale
2. Mark the opportunity as Won in Gym Lead Machine, or add the athlete manually in Kilo GMS
3. Have them activate their account immediately
4. Have them log in
5. Have them add a payment method
6. Assign the package and charge them
7. Show them how to reserve classes
8. Let the New Client campaign in Gym Lead Machine deliver additional information, once you have customized the messaging

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Step 1: Make the sale

Confirm the following with the athlete:

- Package
- Price
- Start date

Once they commit, move straight into system onboarding.

Step 2: Add them to Kilo GMS

There are two workflows, depending on your setup.

If you use the Gym Lead Machine to Kilo GMS integration

This is the recommended path. If you have approved the integration between **Gym Lead Machine (GLM)** and **Kilo GMS**:

1. Mark the opportunity as **Won** in Gym Lead Machine.
2. The contact pushes into Kilo GMS automatically as a new athlete.

No double entry is required.

If you do not use the integration

1. Go directly to **Kilo GMS**.
2. Add the athlete manually as a **New Athlete**.

Step 3: Have them activate their account

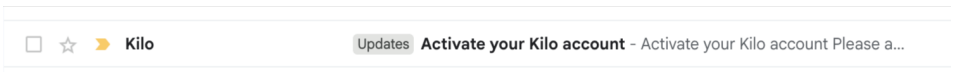
As soon as the athlete is added to Kilo GMS, whether manually or through the integration, Kilo GMS automatically sends an **Activation Email**.

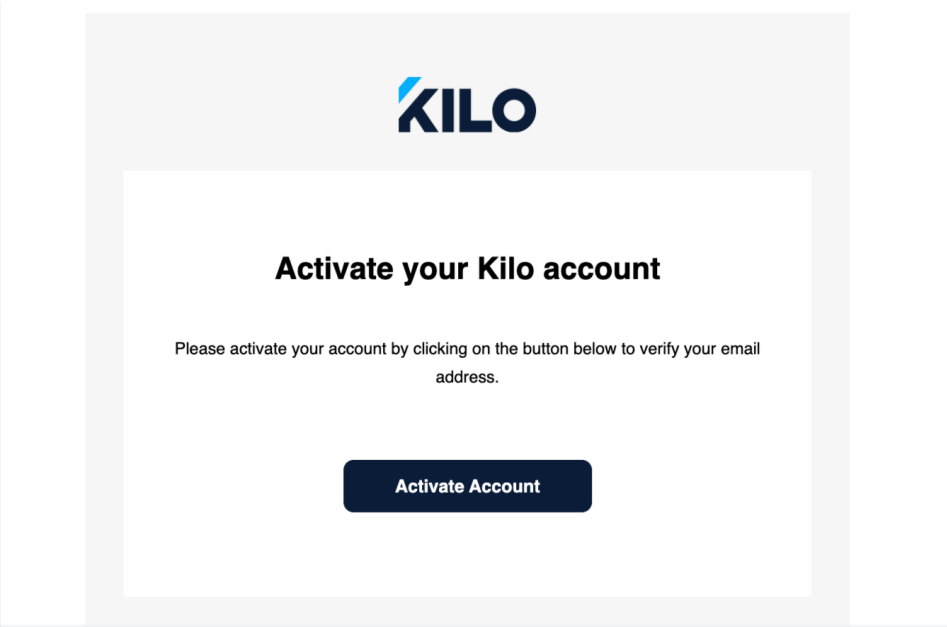
Tip

Do this while the athlete is still sitting in front of you.

Have them:

1. Open their email.
2. Click the activation button.
3. Set their password.





Activating on the spot prevents:

- "I never got the email"
- Forgotten passwords
- Delayed onboarding
- Support tickets later

Step 4: Have them log in

Once the account is activated, have the athlete download the Kilo Members app.

Make sure you physically see them log in successfully. If they can log in now, they will not struggle later.

Step 5: Have them add a payment method

Once the athlete is logged in, guide them to:

- Add their payment method
- Confirm it saves properly

Collect payment information at the time of sale whenever possible.

Note

Waiting to collect payment details later almost always creates friction and follow-up work.

Step 6: Assign the package and process the payment

At this point, the athlete's account is active, they have logged in, and a payment method is saved. You can now:

1. Assign their package.
2. Charge them.

The sale is fully completed inside Kilo GMS.

Step 7: Show them how to reserve classes

Once a package is assigned, the schedule automatically populates with the classes the athlete has access to, and they can self-reserve immediately.

Take 60 seconds to show them:

- How to reserve a class
- How to cancel
- Booking window rules
- Any waitlist behavior

Note

If you require signed documents before booking, remind the athlete to complete those before they leave.

If you cannot complete onboarding during the meeting

Completing onboarding during the sales meeting is strongly recommended. If that is not possible, you can instead:

- Mark the opportunity as **Won** in Gym Lead Machine
- Let the **New Client Campaign** in Gym Lead Machine begin automatically

Many gyms customize one of the early emails in the New Client campaign to include:

- Login instructions
- App download links
- How to add a payment method
- How to reserve classes
- Gym expectations

Even when you complete onboarding in person, reinforcing the instructions by email is a smart retention move.

If you have questions about onboarding new athletes in Kilo GMS, our Support team is happy to help. Reach us at **hello@usekilo.com**.

- Tags
- Gym Management