



# FOUNDATIONS

## ONBOARDING

## PLAYBOOK



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# Introduction

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The purpose of this playbook is to ensure that every new client at Results receives a consistent, welcoming, and informative onboarding experience. By following this structured approach, you will help clients feel valued and excited about their fitness journey from the start.

The playbook guides you through:

- ✓ Introducing clients to essential movements
- ✓ Assessing their mobility and minimizing risk for injury
- ✓ Providing constructive feedback and educating the client on movement quality so that they can get better RESULTS

It also emphasizes the importance of open communication with coaches and outlines the next steps for continued support. The goal of this playbook is to prepare clients thoroughly for their training sessions, maintain high standards of client care, and foster a positive and supportive environment.

# Coach's Guide to Movement & Mobility Assessments

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Detailed instructions and visual aids to support mobility and movement assessments.



## 1. Squat Movement Assessment

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The video discusses a squat assessment, focusing on key indicators of proper form. The coach will observe the client's squat without providing much guidance to see their natural movement. Key elements to watch for will include knee alignment, heel stability, and torso angle relative to the shins. The coach will also look for signs of improper form, such as collapsing at the bottom, which would suggest that the client should not lift heavy weights. The next video will explore potential causes of these form issues.



## 2. Squat Assessment (%)

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The video demonstrates the difference between 50% and 80% range of motion in a squat, with Coach Summer showing the appropriate depths. The video emphasizes that a limited squat depth of 50% or less is a sign that further assessment or caution is needed.

To demonstrate squat range of motion:

1. 80% Range: Slowly lower into a squat, stopping at 80% of your full depth.
2. 50% Range: Perform another squat, this time lowering only to 50% of your full depth.
3. Red Light Indicator :If someone can't squat deeper than 50% or 40%, this signals potential mobility or strength issues that need attention before advancing.





### 3. (S1) Forward lean - ankles or hips

The video covers stretching following a hip flexor release. To perform the stretch:

1. Have the client position their left leg extended to the side while keeping their right leg bent.
2. Instruct them to place their elbow under their chest and get into a plank position (Level 1).
3. They should feel a stretch in the front of the left hip and the inside of the right thigh.
4. Advise them to push their hips toward the floor and maintain a slight squeeze for a deeper stretch.

This will help enhance flexibility and relieve tension in the hip flexors after the foam rolling.



### 4. (S2) Hip Mobility 1

The video focuses on addressing forward lean in squats when heel elevation does not improve the posture. It will guide on performing a hip flexor release. To do this:

1. Have the client lie down on a foam roller positioned at the top of their leg near the hip.
2. Instruct them to roll forward until they feel discomfort in the hip flexor area, not extending more than halfway down the leg.
3. They should roll side to side to target the hip flexor tissue effectively.

This exercise aims to release tension in the hip flexors, which may be causing the forward lean.



### 5. (S3) Hip Mobility 2

The video covers stretching following a hip flexor release. To perform the stretch:

1. Have the client position their left leg extended to the side while keeping their right leg bent.
2. Instruct them to place their elbow under their chest and get into a plank position (Level 1).
3. They should feel a stretch in the front of the left hip and the inside of the right thigh.
4. Advise them to push their hips toward the floor and maintain a slight squeeze for a deeper stretch.

This will help enhance flexibility and relieve tension in the hip flexors after the foam rolling.



## 6. (S4) Squat forward lean corrective for hips

The video presents a solution for addressing excessive forward lean in squats using a resistance band. To perform this correction:

1. Set up a resistance band at chest height.
2. Have the client place their arms under the band, positioning it around the chest and armpits.
3. Instruct the client to step back to create significant resistance from the band.
4. As the band pulls them forward, their body should naturally react by leaning backward.
5. Monitor the client closely to ensure they don't lean too far back or fall forward.

This exercise aims to help correct excessive forward lean by using the band's resistance to encourage proper body alignment.



## 7. (S5) Ankle mobility 1

The video guides through a mobility restoration sequence for addressing ankle tightness. To perform the sequence:

1. Have the client sit on the floor with their right leg crossed over the left, placing their butt down.
2. Instruct them to lift their butt slightly and apply pressure to the soft tissue in the calf, focusing on the soleus area.
3. The client should rotate side to side to release tension in the calf.

This exercise is designed to improve ankle dorsiflexion by targeting and releasing tightness in the calf.



## 8. (S6) Ankle mobility 2

The video shows the next step in the ankle mobility sequence: stretching the calf muscle. To perform the stretch:

1. Start by having the client place most of their weight on the back right foot with the front foot lightly touching the ground.
2. Slightly have them bend the knee of the back leg until the heel begins to lift off the floor, intensifying the stretch in the calf and soleus.
3. Optionally, gently have them move the left knee side to side while maintaining the stretch to target different areas.

This stretch aims to lengthen the calf muscle and improve ankle mobility.



## 9. (S7) Ankle mobility 3

The video demonstrates an effective ankle mobility stretch using a resistance band, known as banded distraction. To perform the stretch:

1. Secure the resistance band around the ankle and step forward with one foot, ensuring the band is in place.
2. Take a small step back with the other foot and lower the back knee to the ground into a kneeling position.
3. Keep the ankle on the ground, lean forward, and let the front knee move as far forward as possible, aiming to lift the heel slightly or keep it grounded.
4. Optionally, gently move the front knee side to side while keeping weight on the front thigh and resting the torso on it.
5. This stretch targets the ankle joint to improve dorsiflexion and reduce forward lean during squats.



## 10. (S8) Guidelines on Squat ROM

The video addresses how to handle clients who perform squats with limited range of motion, particularly if they can't squat below parallel. To manage this:

1. Ask the client if they can squat lower without experiencing pain. Determine if they have pain-free full range of motion.
2. If they experience pain or cannot achieve full range of motion, do not load the squat, as it could be unsafe.
3. Focus on coaching the client to improve their range of motion safely before adding weight.

This approach ensures safety and effectiveness in squatting.



## 11. (S9) Box squat for poor range of motion

The video focuses on empowering clients with limited squat range of motion. To effectively coach them:

1. Acknowledge their current range of motion and discuss the goal of achieving full range without pain.
2. Introduce using a box for squatting, starting with an appropriate height (e.g., 18-inch box) and gradually lowering it as their range of motion improves.
3. Encourage clients to practice squatting to the box and maintain good posture while standing up.
4. Reassure clients that within 2 to 4 weeks, they should be able to perform full-range squats and add weight safely.

This approach prioritizes safety and gradual improvement, avoiding the risk of loading a poor movement pattern.





## 12. OH Mobility Assessment

The Video focuses on assessing overhead mobility, a common issue among clients.

The coach will check for straight elbows and no shoulder shrugging from the front view, which will indicate good shoulder mobility. From the side view, they will look for alignment of the elbows and wrists with the shoulders, hips, and ankles. If the client's ears are not visible without jutting the head forward, it will signal a restriction in shoulder mobility. The coach will advise against loading overhead movements if mobility is insufficient, as it could lead to injury. The next video will cover exercises to improve overhead mobility.



## 13. OH Mobility (%)

The video demonstrates assessing shoulder range of motion. The client will raise their arm to different angles to show 50%, 60-65%, and 75-80% of shoulder flexion. If the client cannot reach at least 75-80% range of motion overhead, it will indicate a "red light" for performing overhead movements.



## 14. (OH) OH Mobility Lat SMR

The video covers a release technique for improving shoulder range of motion by targeting the latissimus dorsi muscle. To perform this technique:

1. Position the foam roller at the back of the armpit, targeting the area where the rib cage meets the back.
2. Roll the foam roller slowly while applying pressure to release tension in the lat muscle.
3. Continue rolling until you feel reduced discomfort in the area.

This method aims to enhance shoulder mobility by addressing tightness in the latissimus dorsi.



## 15. (OH2) OH Mobility SMR

The video guides through an overhead mobility exercise using a foam roller. To perform this:

1. Lie face up on the ground with the foam roller positioned at the top of your shoulders.
2. Lift your hips slightly and start rolling towards your scapula, stopping if you find any particularly uncomfortable areas. Avoid rolling past the mid-back.
3. While on the foam roller, perform "snow angels" by slowly bringing your arms overhead and back to your hips, keeping palms facing the ceiling.
4. Additionally, perform shoulder flexion by raising your arms straight up towards the ceiling and then overhead, bringing them back to the starting position.

Use deep, controlled breathing, synchronizing each breath with your movements to enhance muscle relaxation and effectiveness.



## 16. (OH3) OH Mobility SMR/Active Release

The video demonstrates advanced overhead mobility work using a "peanut" made from two tennis balls or lacrosse balls taped together. To perform this exercise:

1. Position the peanut on the floor under the muscles around your scapula (traps and rhomboids), avoiding direct pressure on the spine.
2. Perform snow angels with your arms, ensuring that your wrists and elbows remain on the ground throughout the movement. This may be intense, with a discomfort level not exceeding 7 out of 10.
3. Focus on deep breathing, exhaling as you move your arms up and down. If you encounter a sticky spot, pause and make small circles with your arms to work through it.

This technique helps in releasing tight muscles and improving shoulder mobility.





## 17. (OH4) OH Mobility Stretch/Lengthen Lats, Pecs, Rotator Cuff

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The video focuses on stretching the lats and chest after foam rolling to enhance shoulder range of motion.

### 1. Lat Stretch

- Begin by syncing your hips back, pushing them behind you.
- Drop your head through your arms, letting your chest fall towards the floor.
- Pull away from your hands to feel a stretch in your lats.

### 2. Chest Stretch

- Use a rig or post for support.
- Place your forearms on the rig, step forward, and let your body fall through the rig.
- To target different areas, move your arms up and down while maintaining the stretch.

These stretches help open up the shoulders, improve range of motion, and prepare clients for more intensive exercises.

# Script

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## Communicating What to Expect to the Client (2 minutes)

### Here's your script:

Welcome to Results! We're thrilled to have you join us for your onboarding session today. This session is designed to guide you through our initial assessment and movement screening process, ensuring the best start on your journey with us.

#### Objective:

Our goal during this onboarding session is to build a strong foundation with you. We'll introduce you to key movements that are integral to our workouts, helping you understand how your body moves and how to communicate your movement needs with our coaches. Sound good?

#### Communication and Feedback:

Throughout the session, we encourage open communication. Share any discomfort or issues you experience. We will use a green, yellow, and red light system as a means of measuring the quality of movement. We'll discuss potential modifications based on assessment findings to ensure safety and progression to help you achieve your goals.

#### Next Steps:

Based on today's assessment, we may suggest additional follow-up sessions to delve deeper into specific areas. This will help tailor your training experience to your individual needs.

Our aim is to ensure you feel confident and supported as you begin your training with us. We're here to be the best part of your day, and we look forward to helping you achieve your fitness goals. Let's get started!

# Squat Mobility Assessment

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**Movement Patterns:** We are going to do two movement assessments today, both of which you will see regularly in the workouts - Squat Mobility assessment and Overhead Mobility assessment.

**Squat Mobility Assessment:** We'll begin with assessing your squat mobility. Squatting is a fundamental movement we use regularly, so it's crucial to gauge your current mobility so that you can avoid injuries. After observing your squat, I'm going to provide you with feedback and guide you through adjustments and mobility work so that you can maximize your results.

Let's get started! (Print this form ahead of time) **Foundations Assessment Form**

## Squat Mobility Assessment Form

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**Squat Mobility Assessment Instructions:** Ask the client to do a basic squat 5-10 times and slowly, if needed, to better review their movement. View client from both the front and the side/profile view.

### Points of assessing Overhead Press performance:

- Posture - is chest up and torso angle - is relatively the same as the tibia: y / n
- Range of motion - is at 80% or better: y / n
- Ankle/hamstring/hip mobility - do heels stay on ground: y / n
- Hips - are parallel to the knees or lower: y / n
- Knee stability/glute strength - is knee position out: y / n
- Overall status of movement:
  - ☐ Green light (All yes's)
  - ☐ Yellow light (Client has 1-2 no's)
  - ☐ Red light (Client has pain or less than 50% ROM or 3 or more no's)
  - ☐ Pain or injury (Red light)

### Other notes:

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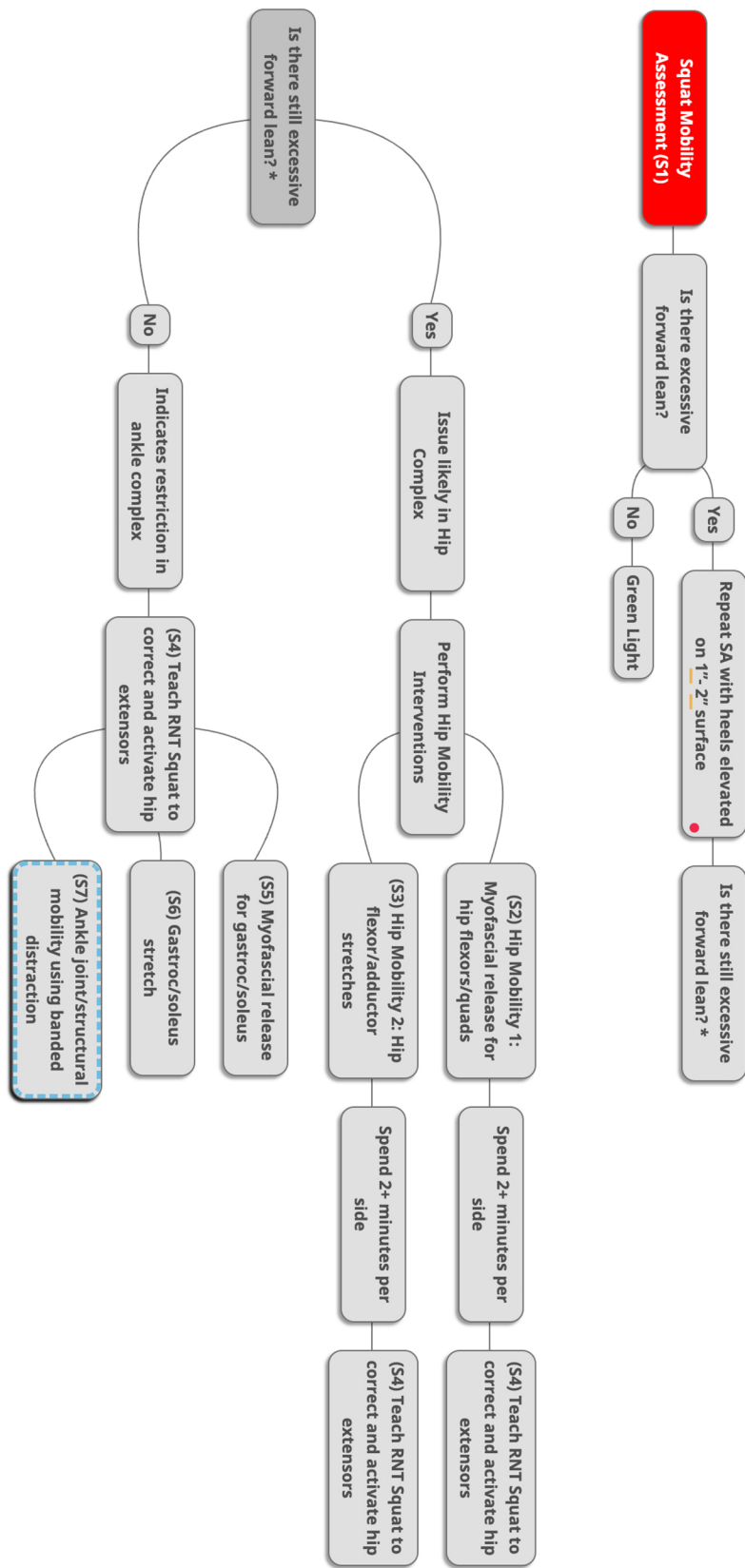
Once assessment is completed reference the 'Assessment Flow Chart' for mobility movement homework to work. This can be completed before/after class, during class at a station you are red lighted for or at home:

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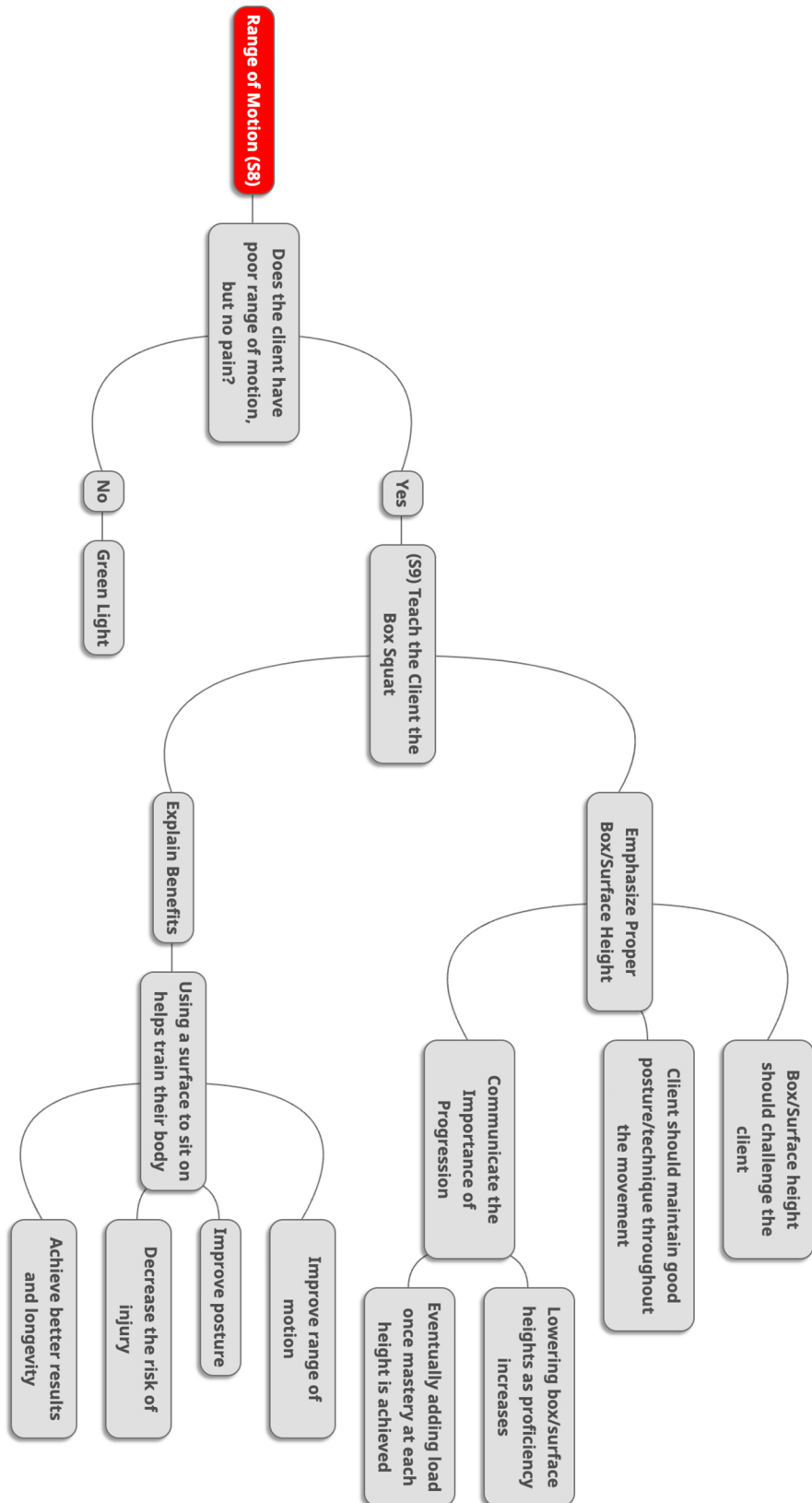
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# Squat Mobility Flow Chart



# Squat Mobility Flow Chart





# Overhead Mobility Assessment

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**Overhead Mobility Assessment:** Next, let's assess your Overhead Mobility. This is important for various exercises involving dumbbells, kettlebells, and TRX movements. After observing your Overhead Mobility, I'm going to provide you with feedback and guide you through adjustments and mobility work so that you can maximize your results.

Let's get started! (Print this form ahead of time) **Foundations Assessment Form**

## Overhead Mobility Assessment Form

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**Overhead Mobility Instructions:** Ask the client to lift arms overhead 5-10 times and slowly, if needed, to better review their movement. View client from both the front and the side/profile view.

### Points of assessing Overhead Press performance:

- Torso Stability and Alignment - everything is lined up (wrist, elbow, shoulder, hip, knee, ankle) and no overarching of back: y / n
- Shoulder mobility - are biceps behind the ears: y/ n
  - straight elbows: y / n
  - shrugging shoulders: y / n
- Range of motion - is at 80% or better: y / n
- Overall status of movement:
  - ☐ Green light (All yes's)
  - ☐ Yellow light (Client has 1-2 no's)
  - ☐ Red light (Client has pain or less than 50% ROM or 3 or more no's)
  - ☐ Pain or injury (Red light)

### Other notes:

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Once assessment is completed reference the 'Assessment Flow Chart' for mobility movement homework to work. This can be completed before/after class, during class at a station you are red lighted for or at home:

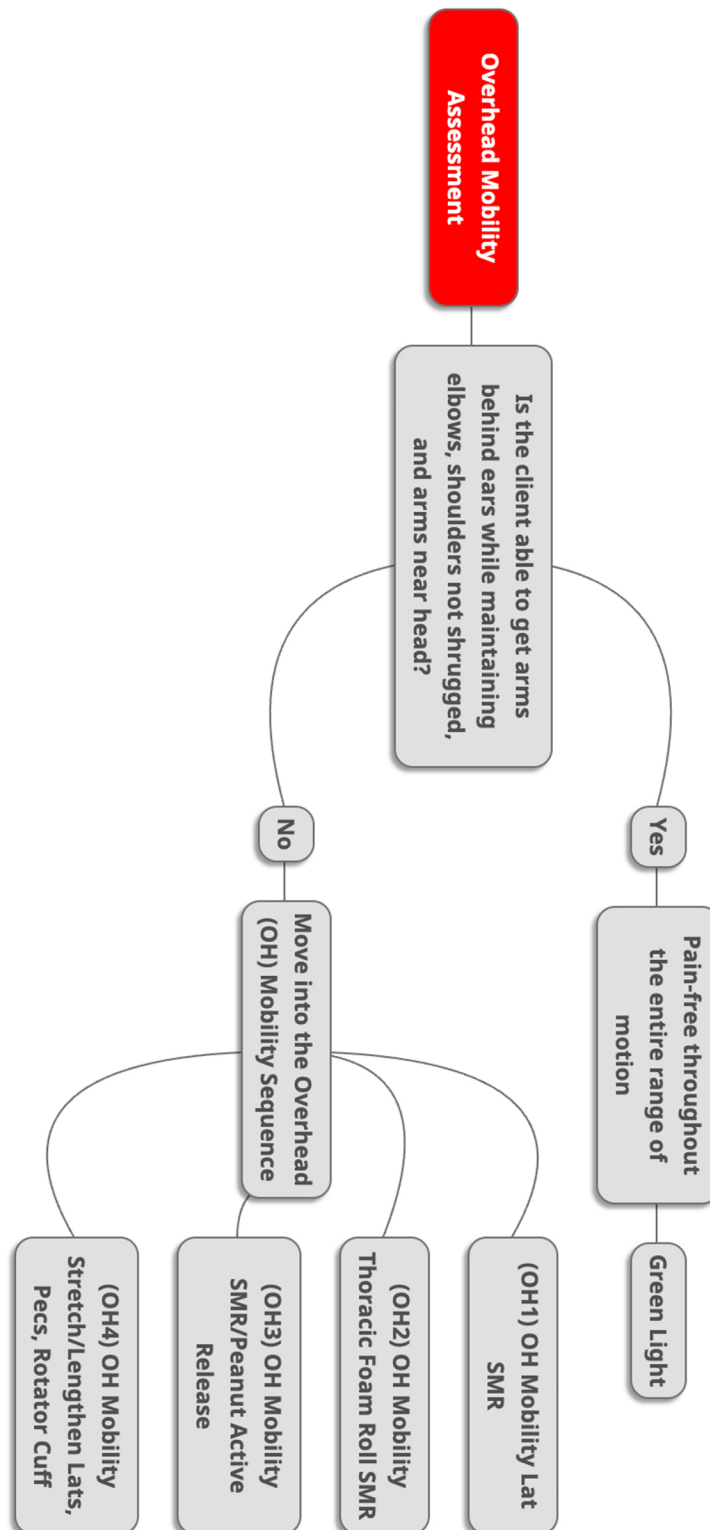
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# Overhead Mobility Assessment Flow Chart

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# Movement Summary

DAY 1- Foundational Movement - 30 min

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Workset	Do the mobility assessment, and then the corrective/mobility movement sequences. Be sure to read the entire playbook for the entire				
Assessments	<a href="#">Squat Mobility Squat (%)</a>	<a href="#">OH Mobility OH Mobility (%)</a>			
Movement	<a href="#">Squat Mobility Sequence</a>	<a href="#">OH Mobility Sequence</a>			
Green light Mover	Full ROM (hips at or below knees), pain free	Straight elbows, arms behind ears, shoulders NOT shrugged, pain free			
Yellow Light Mover	At least 80% ROM, pain free	At least 80% ROM, pain free			
Red Light Mover (pain)	Less than 50% ROM, and/or has pain during the movement	Less than 50% ROM, and/or has pain during the movement			
Coaching Notes	<p>General: Allow the client to move freely and assess their movements based on the Assessment videos. Proceed to using the mobility sequences needed based on your assessment of their movements and their 'lighting status' - Green, Yellow, Red.</p> <p>Show them the proper sequence based on assessment findings to practice on their own as homework. Make sure day 2 is scheduled. <a href="#">Foundations Assessment Form</a></p>				