



Online 101

– a guide to platforms and tools
to help small businesses deliver
exercise services online

This is a guide for small exercise businesses that are exploring delivering exercise services online. It outlines the various elements to consider, as well as the various platforms and services that can help in delivering it. We also cover some of the legal, licensing and insurances issues related to online delivery.



How to best use this guide

This guide is not a definitive list of all providers/services, nor a detailed 'how to' on any one service in detail, but rather designed to highlight the key questions to consider, as well as showcase examples of those that do provide services which can help you record/deliver and collect payment for various online services.

For more information on any of the services or topics, we suggest using an online search engine such as Google. Once you have the name of a service/idea of what you are looking for, you will find dozens of excellent resources already produced that will likely answer not only your questions, but can also be shared with clients that explain procedures such as how to log in/get started all the way through to answering highly technical questions or specific cases.

Note: Using many services on the internet are free, sometimes it's worth paying a small fee to ensure you get a more polished (or maybe just an ad free) platform/service.



Your objectives

The first step is deciding what your objectives are. The three most common objectives include:

- 1) Generate revenue
- 2) Keep your customers engaged (so they come back when you re-open)
- 3) Keeping staff engaged and/or employed

It can of course be a combination of all of the above, or something else altogether, but establishing your objective(s), and in which priority, will help determine which platform(s) are best and easiest.

Three key elements

When deciding what and how to deliver your services online there are three key considerations:

- **What to deliver.**
 - is it 1:1 or class based (or both)
 - Is it a replication of existing services converted to an online version, or new services altogether
 - Is it a studio/facility is the studio delivering this, or is it just a series of individual teachers/instructors doing their own thing? (this will affect how you market this and who people pay).
- **How to deliver it**
 - is it live, or pre-recorded or both?
 - if live – is it interactive (others speak to the instructor) or just a one way stream?
 - if multiple delivery people (i.e. a large timetable) – how will this be coordinated?
 - What is your target market – existing members and/or anyone at all?
Note: See topics on insurance and music licensing if considering having customers outside of New Zealand.
- **Payment.**
 - Is this free or paid?
 - If free, is it free to members/clients or everyone? (please see music issues related to unrestricted delivery).
 - If paid – will you use existing payment methods (like a Direct Debit company) or set up a new one. If new, can this be done manually or will a system/platform be needed?
 - If it's studio/facility based be clear if they are paying/buying from the instructor/teacher/PT or from the studio/facility. See also insurance below.

Delivery and recording platforms

Platforms for 1:1 or a small number of classes

If a PT or a coach/teacher that predominately delivers 1:1 sessions, or a for business delivering group classes, then the easiest platforms to use are:

- **Zoom** (www.zoom.us). Notes:
 - The free version allows for sessions up to 40 minutes. For longer, buy the paid version (US \$15/mth), or just stop the session and restart if viable.
 - Zoom has a 'per host' fee, with one host you can run one session at a time. A studio could have one 'host' account and share login/password with multiple instructors, as long as there are never two classes at the same time. Your clients need to download the app on their device but do not need to create an account to use it.
 - Sessions can be recorded in the Zoom app
- **Skype** (www.skype.com). Notes:
 - Free Skype calls use a contact list (like a directory) so clients will need. Your Skype account details (or you theirs) to initiate a call. There are other paid versions that can use a common link (like Zoom)
 - Skype is free for Skype to Skype calls (there is a charge for Skype to Phone calls)
- **Facebook messenger**. Notes:
 - Can be used for 1:1 or small groups (up to 8).
 - Free to use, with no time limit but does require knowing the others persons details on FaceBook.
- You can also use other platforms like Facebook video chat, Facetime (for those with iPhones) or any other platform/app that has a video chat function. Many are more suited to 1:1. than groups as they require you to directly call or connect to all people who will be on the class/session.



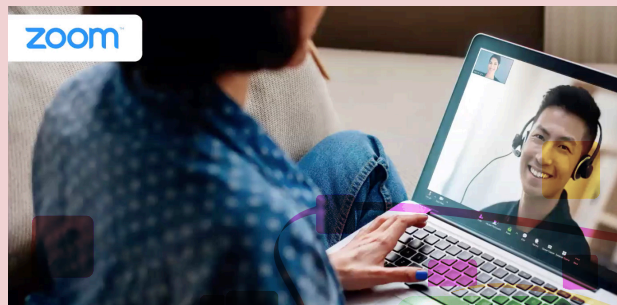
Important: We do NOT recommend using any Facebook service (other than Messenger) or YouTube for any sessions that have background music in them – see section on music licensing for more details.

One of the advantages of systems like Zoom (as opposed to the free version of Skype/Facebook Messenger etc) is that as the trainer/coach you don't need to have any contact details for clients, such as name/number/Facebook account etc – trainer/teacher and clients simply share a link for clients to click on to a virtual room in the cloud using a web-link as an address. So as long as clients have the link they can connect themselves. If they disconnect, they can re-join by re-clicking on the link (very useful in a group setting).

Note: None of the above systems have a payment portal – they are just ways of connecting with people. See below for payment portals and/or full service (delivery & payment) systems.

Zoom tips

- For group exercise sessions, connect a second device at the back and/or side of the room so if you face backwards you can see the participants and yourself (connect this like a normal client – don't log in as a host).
- There are a number of settings you can pre-select for each Zoom session – review these. Things such as automatically muting all clients when they join is very useful for group sessions, but can be annoying for 1:1 calls, especially when the client isn't tech savvy. We suggest looking at all the settings – lots are useful.
- Audio: If doing a live class you can select a music sources such as Spotify in the advanced settings. Also if you plug in a mic into your computer/laptop you can also select that as a sound source and mix the two together. This will give the best possible audio quality to the other end
- There are some excellent 1/2/3 guides for new Zoom users. Share these with any non-technical clients to help them get underway (use Google to find them)



Video storage/playback platforms

There are many systems that allow storage and replaying video content (such as pre-recorded classes). The two most common are:

- **YouTube** (www.youtube.com): Free to use, but note that the end user will have ads within videos. The end user can pay to remove ads, but this can not be done at your end.
- **Vimeo** (www.vimeo.com): Vimeo is a paid service (starting at \$US 20 per month), with the advantage that there are no inserted ads.

Notes:

- Unless you want your videos to be accessible to everyone, ensure the videos are marked as 'Private' in the video's settings (that way only individuals with the videos link can view it) or have a password. Both these are settings changed within YouTube/Vimeo per video.
- Neither YouTube nor Vimeo offer a paywall of anykind, so if a link or password is shared then anyone can view the video (and re-share the link). The only way to address this is to change the password to each video periodically (very labour intensive). For large scale video storage behind a paywall we recommend a full service platform (see below)
- See music licensing rules related to use of music – there are restrictions on pre-recorded classes using music.

Other solutions: Services like DropBox can be used to store videos, and shared via a link, but this is only useful when you are manually sending videos to a small client base. Dropbox is not a video platform, but can be used to store them.



Payment portals

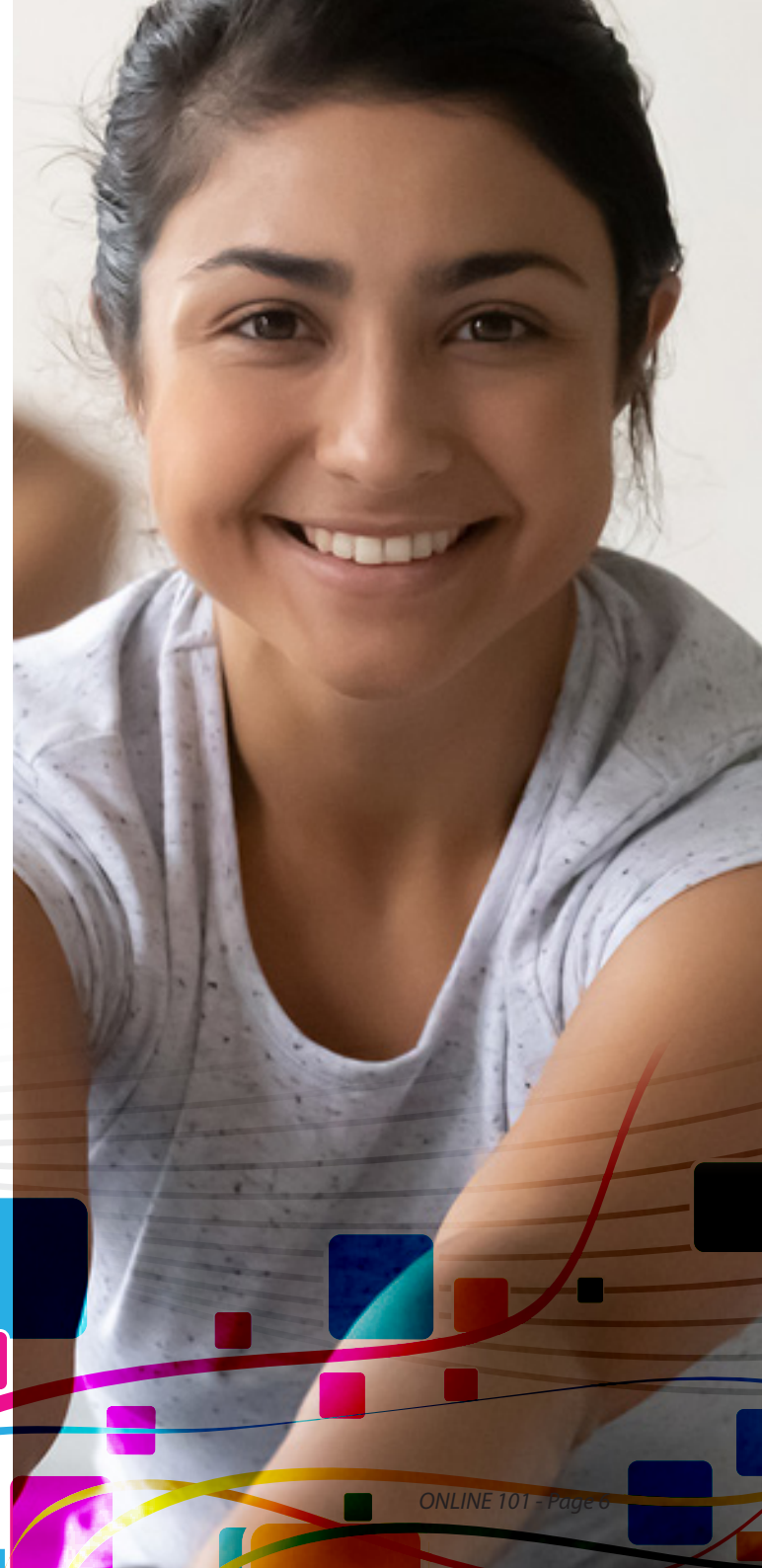
- Direct Debit (DD) provider: For businesses with an existing DD provider, then using them will likely one of the easiest ways to collect reoccurring payments, especially from existing customers
- Paypal (www.paypal.com): – perhaps the most widely used payment platform globally. This can be integrated into web sites, or just sent as a link with “pay here please”.
- Patreon (www.patreon.com): – while not specifically designed for these types of payments, and it has a higher fee than most (8%), it does have reoccurring subscriptions and at multiple levels, and an easy to use and attractive interface for the end user.
- **Web site integration** (using Stripe/Poli/Paypal etc): See below about full services options for integrating a payment portal into your web site.

How to manage access (i.e. only those that have paid can access sessions)

A number of options to limit access to sessions/classes:

- Private Zoom link sent each week to paying clients/members
- Web page members-only section with login (which expires when not paid).
- For small numbers – private Facebook group or chat group and codes/links shared there

Important for all systems: Change the password regularly unless the system automatically removes access when it expires (there are a number of systems that do this and integrate with web sites and payment portals too – talk to a web developer for this).



Full service Platforms

There are a number of full service platforms that provide a variety of services from scheduling classes, integrated payment portals, live links etc. Some even provide exercise libraries to share with clients for programmed delivery (useful for for PTs)

- www.mindbody.com – one of the world's largest, and used by thousands of studios around the world.
- www.masterfits.com – a New Zealand based company that provides not only a payment portal, but an extensive online exercise library/diet plans etc, can be white-labelled (made your own app), or used as is.
- www.tryinstabook.com/ - another full service platform with booking/payments etc
- <https://gymlete.com> – another exercise library/clients interaction system (App based).
- **Web site based:** Build it yourself (or have a web company do it). Web sites with an inbuilt payment portal, with video content or links to live sessions behind a paywall. While this may not be as quick, but can be cost effective, especially if you already have a web site.

Each of these platforms is very comprehensive, but also very different and uses different business models and payment plans. If you are looking for an all in one service, we'd recommend looking at the above web links and reviewing them in full, and requesting a demo where available.



Other considerations

Legal – pre-screening and disclaimers

Pre-screening – we recommended following the standard pre-screen process for any new clients. A reminder the REPs digital pre-screen tool is free and available to all registered exercise professionals, including YogaNZ members (there are three versions: a full pre-screen, class based, and Yoga based). Where pre-screening isn't feasible, then comprehensive pre-workout information for safely undertaking your service at home should be provided to all attendees.

Disclaimers – avoid using any US based disclaimers, and/or any that attempt to have any blanket 'no liability' clauses – these are likely to breach the Fair Trading Act it is not legal to contract out of liability for Health and Safety, nor for Consumer Protection laws. Instead, focus on providing clear guidance on what clients should do for their own safety, as well as what your services do, and do not, cover. Having clearly communicated policies for cancellations, refunds and other similar matters is also good practice.

Music considerations

Using music in exercise sessions will mean there are many additional important issues to consider, including the need in many cases to have a music license. This is summarised below:

- For background music for 1:1 sessions, we encourage having your client play music at their end (you can share a Spotify playlist with them if you wish). Having clients play their own music does not require a music license. If you play music then you do in most cases.
- For all other public performance (including 1:1 sessions – this is regarded as a 'public performance') then a license is required, unless your music is license free (you will need to find this out specifically from your music source). In New Zealand licenses are obtained from www.onemusic.co.nz
- The good news is for anyone with an existing license from One Music that this is valid to deliver classes online. One Music license rules for online delivery include:
 - Only deliver to clients in New Zealand
 - Not to have any ads in your videos other than ads for your own services
 - Ensure that the video is live (i.e. not pre-recorded)
 - Have the video behind a paywall/password system of some kind

For full details visit:

<https://www.onemusicnz.com/news/2020/exercise-well-being-dance-live-streaming/>

- We do not recommend using Facebook or YouTube for any delivery of sessions that include music – doing so could result in your account being suspended or terminated



Insurance

Check to make sure any insurance coverage covers you/your business for online activities.

- **REPs/YogaNZ:** If you hold insurance as an exercise professionals through REPs (including members of YogaNZ who have purchased insurance as an option), then your insurance does cover you for NZ to NZ based – activities (ie. both you and your clients are in NZ)
- **Your own insurance** – you will need to check directly with your insurer or broker.

A reminder this guide is designed to be an overview of the things to consider along with a list of some of the more common delivery, storage and payment options available. We recommend reviewing in full, as well as using the huge amount of online videos and resources that can guide you in this space. For those that choose to, there are also individuals and companies that can do this for you for a fee.

