

The FitBiz Back-End Blueprint

Your Step-by-Step Guide to
Organizing, Automating, and
Optimizing Your Business Back End



VirtuallyAligned
— streamlined success —

Welcome to Virtually Aligned!

At *Virtually Aligned*, we believe that when your back end runs smoothly, you're free to focus on the work that truly lights you up. We're here to help small business owners — especially those in the fitness and wellness space — build systems that support sustainable growth, ease, and alignment. Whether it's organizing your client onboarding, streamlining your invoicing, or managing your weekly ops, our mission is simple: to take the overwhelm off your plate so you can show up fully for your clients and your business.

Meet Victoria

I'm *Victoria*, founder of Virtually Aligned. With a background in operations and a passion for process, I spent years building systems in the fast-paced restaurant industry before transitioning into the health and wellness space. As a certified personal trainer and nutrition coach, I know how much energy it takes to run a service-based business — and how life-changing it is to have the right support behind you. I'm here to share the tools, structure, and systems that help you work smarter, not harder.



What You'll Get Inside

This guide will walk you through:

- Setting up a simple, seamless client onboarding system
- Automating your emails, scheduling, and follow-ups
- Creating a weekly operations checklist so you stay consistent and in control
- All of which helps you save time, stay organized, and scale smarter.

Let's build a business that supports you — not one that burns you out.

♥ *Victoria*

P.S. If you get stuck or want extra help, reach out anytime at victoria@getvirtuallyaligned.com

Client Onboarding System

 *Goal: Create a smooth, professional experience from inquiry to first session.*

Step-by-Step:

1

Client Inquiry Form

- Use Google Forms, Dubsado, or HoneyBook
- Include: name, goals, services interested in, preferred schedule

2

Automated Welcome Email Template

- Includes: brief intro, next steps, booking link

3

Booking a Discovery Call or Session

- Recommended tools: Calendly, Acuity
- Pro Tip: Set up email reminders + intake form

4

Contract & Payment Setup

- Tools: HelloSign or HoneyBook for contracts, Stripe or Square for payments
- Include: cancellation policy, package details

5

Onboarding Checklist Template

- Include a downloadable checklist so nothing gets missed

Automations & Email Workflows

 *Goal: Save hours per week by automating repetitive admin tasks.*

What to Automate (and How):

1

Email Sequences

- Welcome series for new clients
- Nurture emails: fitness tips, testimonials, upsells
- Re-engagement emails for inactive clients
- → Tool suggestions: MailerLite, Flodesk, ConvertKit

2

Appointment Reminders

- Use Calendly or Acuity for automated reminders via email/text

3

Recurring Invoicing & Follow-ups

- Set up auto-billing for packages or memberships
- Add payment reminders for late invoices

4

Task Management

- Use Trello, ClickUp, or Asana to create recurring workflows (onboarding, newsletter, content planning)

Weekly Operations Checklist

 *Goal: Keep your business running smoothly week after week — without dropping the ball.*

Weekly Ops Checklist:

1

Every Monday

- Review weekly calendar & sessions
- Check inbox and flag important client messages
- Review payments received + unpaid invoices

2

Midweek (Wednesday/Thursday)

- Follow up with leads/inquiries
- Check client progress & update notes
- Review social media content calendar

3

Friday Wrap-Up

- Send client updates or feedback
- Review analytics (social, email, bookings)
- Plan & schedule content for next week
- Clean up inbox + files

Bonus Tip: Add 1 hour each Friday to your calendar for “CEO Time”

Final Thoughts

I hope you're able to take these tips and apply them in a way that brings more structure, clarity, and ease to your business. Even small changes to your back end can make a big difference — freeing up your time and energy so you can focus on doing what you love.

If you're looking for more detailed guidance, or if you'd rather hand off some of these tasks entirely, we'd be happy to support you. At Virtually Aligned, we offer services like social media management, bookkeeping, inbox and client management, invoicing, newsletters, blogs, website support, and more. Whether you're ready to delegate or just need help building better systems, we're here when you need us.



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