

Personal Trainer Admin Assistant

Setup and everyday use – step by step, no technical knowledge required

This guide shows you how to set up the Admin Assistant in Claude (Cowork) and then run your whole week with a single sentence. You don't need any programming or IT knowledge – just follow the steps here and answer the questions you are asked.

In short: the system reads your Google Calendar, plans the next session for every client at the right point in their 4-week cycle, writes it into an Excel workbook, and prepares an invoice when one is due. You check everything at the end – nothing is ever sent on its own.

1. What you need first

Before you start, make sure the following is in place. Tick off what you already have:

☐	Claude with Cowork is installed and activated (the desktop app).
☐	You have a folder on your computer that you want to use for this system (e.g. "Personal Training"). It doesn't need anything in it yet – it just needs to exist.
☐	You have access to your Google Calendar account (where you book your clients' sessions).
☐	You have access to your Gmail account (where invoice emails are prepared as drafts).
☐	You have unzipped the "Personal Trainer Admin Assistant" ZIP file and can find the folder from it on your computer.
☐	Optional, and can be done later: your own invoice template as a Word file, for each client you bill by invoice.

One quick word on a term that comes up often:

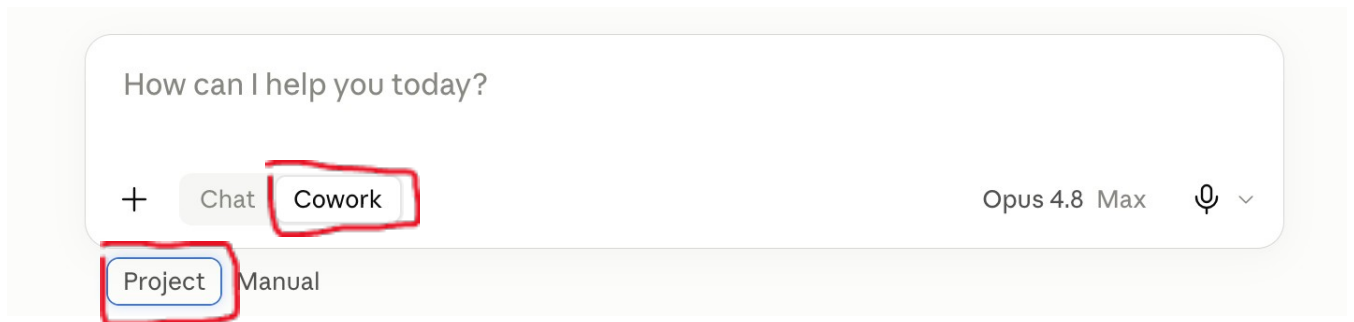
What is a "skill"?: a skill is a kind of working instruction that Claude follows when you give it a particular task – like a recipe a cook follows. This package contains four such recipes. You don't need to understand or edit them – you add them once, and Claude does the rest.

2. Setup (one time only)

You only do these steps once, right at the start. Allow 20–30 minutes, mainly for step 4, where you gather your client details.

Step 1 – Create a folder and connect it to Cowork

1. Create a folder on your computer that you use only for this system, e.g. **"Personal Training"**.
2. Open the Claude desktop app and switch to Cowork mode. Then click "Add folder" and choose this folder.



3. Copy the subfolder “**templates**” from the unzipped ZIP file into this connected folder, so Claude can reach it during setup.

Step 2 – Connect Google Calendar and Gmail

In Cowork, connect the two accounts as “connectors”:

- Google Calendar – read only, never changed. The system checks there which sessions actually took place.
- Gmail – invoice emails are created here as drafts, which you review and send yourself.

If you’re not sure where to do that, just ask Claude: “How do I connect my Google Calendar to Cowork?”

Step 3 – Add the four skills

The package contains the four skills in two formats – you only need to use one of them:

- **Easiest:** import the four ready-made files in the “skill-files” subfolder (ending in .skill) into Cowork.
- **Alternative:** add the four folders in the “skills” subfolder (each one contains a SKILL.md file).

If you’re not sure how, ask Claude directly: “How do I add a skill to Cowork?” – Claude will walk you through the exact steps in your version of the app.

These four skills belong together. Week to week, you only ever talk to one of them:

Skill	What it takes care of
pt-setup	The setup wizard. Runs now, once only.
week-planner	The weekly planner. This is the skill you use every week.
training-plan	Builds the actual session content. Called automatically in the background.
invoice-generator	Creates invoices and email drafts. Called automatically in the background.

Step 4 – Start the setup wizard

Now you enter your own details and those of your clients. To do that, say in Claude:

What you say to Claude: “**Set up the trainer skills.**”

Claude then asks you two rounds of questions. Just answer them in order – for anything you don't know right now there are sensible defaults, which you can change at any time later.

Round A – Questions about you as the trainer

Detail	What it means
Name / sign-off	How you want to sign off on invoices and in emails, e.g. “Alex” or “Coach Jordan”.
Business name	Optional – if it should appear in emails.
Default language	German or English – only applies where a client has no language of their own set.
Invoice number step	How much the next invoice number goes up by. Default: +1.
Payment term	How many days after the invoice date payment is due. Default: 7 days.

Round B – Questions about each client

This is the most important part. For each client you fill in a complete profile. It takes only one to two minutes per client:

Field	What you enter here
Name	What the client is called in your calendar – it has to match the event title in Google Calendar, otherwise the system won't find their sessions.
Sheet name	Name of the client's tab (worksheet) in the Excel file, usually their full name.
Invoice name	Full name for the invoice. Only needed if you bill this client by invoice.
Training split	E.g. full body, upper + lower, push/pull/legs, or your own model.
Sessions per week	How many sessions the client normally trains per week (1–5).
Experience level	Low / medium / high – sets the starting point and how quickly load increases.
Coordination	Poor / medium / good – sets how demanding the exercises may get (safety first).
Package size	Number of paid sessions in one package, e.g. 10.
Invoice trigger	At which session in the package the invoice is triggered, e.g. at session 8 of 10 (2 in advance).
Payment method	Invoice (PDF) / instant payment such as Twint or PayPal / cash or other.
Invoice language	German or English, per client.
Renewal	“Yes”, or “last package” if it ends after this one.
Special notes	Free text for anything that makes this client individual – see the examples below.

Examples of “special notes”, to give you an idea of what belongs there:

- “Usually arrives 15 minutes late – only time for 2 trisets, no C-block.”
- “Only 3 sets in the A-block (instead of 4), to leave time for conditioning.”

- “No baseline numbers yet – start carefully in the first cycle.”

Payment method – the difference: with “invoice”, a PDF invoice is created automatically at the trigger session and an email draft is prepared in Gmail. With “instant payment” (e.g. Twint) there is no invoice – instead, a single reminder line appears in your weekly summary at the last paid session. With “cash”, sessions are only counted, with no invoice and no reminder.

Client already mid-training?: if a client isn’t new, the wizard also asks which training week (W1–W4) and which billing package they are currently in, and how many sessions of the current package they have already done. If you don’t know exactly, it starts with “package 1 / week 1 / 0 sessions” – you can correct that in the Excel file at any time.

At the end of this round, Claude automatically creates your working file “Training Plans.xlsx” in your connected folder – with one worksheet per client, plus the overview sheets for schedule, cycles and billing.

A note from Sam: “You don’t have to use AI-generated sessions based on my training philosophy. You can also have them pre-generated and then change them yourself – the skill knows not to overwrite sessions you wrote yourself, and progresses those through the 4-week cycles instead. Ideally, build your own training-plan skill to replace mine.”

Step 5 – Add your invoice templates

For every client you bill by invoice (PDF), you need your own Word template:

4. A subfolder “**Invoice Templates**” is created automatically in your connected folder (if it isn’t, create it yourself).
5. Put a clearly named Word file in there for each invoiced client, e.g. “**Invoice Template Anna Meier.docx**”.
6. This is your own template – with your letterhead, your bank details and so on (alternatively, there is a template in the package you can use). In the places that change on every invoice, enter these three placeholders:
 - **{{INVOICE_NUMBER}}** – the invoice number
 - **{{INVOICE_DATE}}** – the invoice date
 - **{{DUE_DATE}}** – the due date

Everything else in the template stays exactly the same on every invoice. To get you started, the package includes “Invoice Template (example).docx” under “templates” – a neutral, one-page template with the placeholders already in place. Just add your own logo and details.

Important: clients who pay by instant payment (Twint, PayPal or similar) or in cash don’t need a template.

I reconcile payments in a note on my iPhone, where I check which invoices have gone out and whether the money has come in. That’s mostly for my own peace of mind.

3. Before the first run – a quick check

Before you say “Plan next week” for the first time, go through these points once:

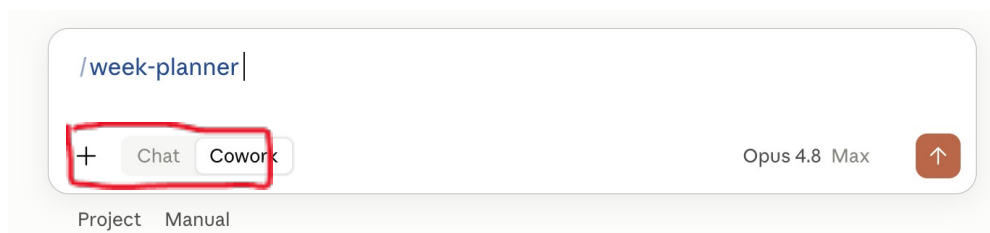
☐	The file “Training Plans.xlsx” is in the connected folder and has its own tab for each client.
☐	Google Calendar and Gmail are connected.
☐	Every invoiced client has a template in the “Invoice Templates” folder – if one is missing, the system skips the invoice for that client and points it out in the weekly summary.
☐	Your own details (name, default language, invoice number step, payment term) are filled in.

If something is missing, that’s no problem – the system tells you exactly what on the first run, instead of guessing.

4. How you use it each week

From here on, the weekly routine is as simple as it gets. Ideally towards the end of the week, say to Claude:

What you say to Claude: “Plan next week.”



Alternatively, select the

week-planner skill manually:

Here is what happens in the background – you don’t have to do anything else:

7. Review: the week just gone is checked against your calendar – sessions that didn’t happen are removed, ones that did are added, moved times are corrected.
8. Next week’s calendar is read and each client’s sessions are logged.
9. For every session, the matching workout is written – at the right point in that client’s 4-week cycle.
10. Where an invoice is due, a draft is prepared in Gmail; for instant-payment clients, a reminder appears in the summary instead.
11. At the end you get a clear summary to read over.

Most important: nothing is ever sent automatically. Invoices only ever land as drafts in Gmail, instant-payment reminders only appear in your summary. You always check and send yourself.

5. Changing things later

Changing the details of an existing client

Everything about a client – split, package size, invoice trigger, payment method or special notes – lives in the “Client Profiles” sheet inside “Training Plans.xlsx”. Just edit the matching row directly in Excel; every planning run reads these details fresh. You never have to edit a skill yourself.

Adding a new client

Two options:

- Add a new row to “Client Profiles” and to the overview sheets yourself, and create a new worksheet (easiest by copying an existing one). Easiest of all with Claude’s Excel extension – just say “Set up the client profile for XY, based on the formatting of the existing clients”.
- Or run the setup wizard again with “Set up the trainer skills” and enter only the new client’s details – existing clients are left untouched.

6. The two most important principles

This system keeps two things strictly apart. Once you understand them, the rest makes sense immediately:

- **Training week (W1–W4):** determines only what the training looks like (reps, load). It moves on a step as soon as a client actually completes a session – if a session is missed, they simply stay where they are until they make it up.
- **Billing package (cycle):** a fixed number of paid sessions, independent of the training week. A new cycle in the Excel file starts only when a new package starts – never just because week 4 has been reached.

And as a rule of thumb: the calendar is always right. Every weekly run first brings the workbook in line with what actually happened according to the calendar, before it plans ahead.

7. Frequently asked questions

Question	Answer
A client’s invoice template is missing – what happens?	The system skips only the invoice for that client and points it out in the weekly summary. As soon as you add the template, it works automatically on the next run.
A session was moved at short notice – do I need to change anything?	No. It is corrected automatically from the calendar the next time you say “Plan next week”.
Can I change a client’s details later on?	Yes, at any time, directly in the “Client Profiles” sheet – see section 5.
Is an email ever sent automatically?	No. Invoices are only ever created as drafts in Gmail; you check and send them yourself.
I haven’t connected Google Calendar or Gmail yet – can I still	You can still finish the setup, but the system keeps pointing it out until both are connected – without the calendar, no week can be planned.

Question	Answer
start?	
During setup I can't remember exactly where a client is.	No problem – let the wizard start with the defaults (package 1 / week 1) and correct the numbers directly in Excel later, once you have looked them up.

If anything stays unclear, just ask Claude directly – for example “How do I add a new client?” or “Why wasn’t an invoice created for this client?”. The system is built to ask, or to point out a gap, rather than invent something.