



[How to Record and Communicate Client Training Data across your Business with David Gschneider](#)

Lawrence: David, welcome back to The Membership.

David: Thanks for having me on, Lawrence.

Lawrence: No, I appreciate it and appreciate you just taking the time to talk about how the trainers share information on clients in Discover Strength because as we know as we're training people, there might be new injuries, they might be reasons to modify a workout and it can get quite complex. And so I'm really interested to hear how you guys actually record that and then how you share it effectively so that you know a client is getting a great experience every time they come in for a workout. So do you want to just start off by talking about the sort of tools that you use there to record client data?

David: Yeah, so there's a couple of different things that we use. So we want to make sure that we're communicating these things and basically in a multifaceted approach, right? If we just communicated in one way, it's probably going to end up getting missed more frequently. And so we want to make sure that we're communicating in multiple ways. So example of that would be, there's a few things that we might do in person. So if we're doing a group on the training floor, and I have a shared group with another one of our trainers and a client tells me about an issue that they're having, as long as it's not too personal, if it's simply something that we have to modify the workout for, I'm going to share that with the other trainer. So I might yell across the room and say, "Hey, dealing with a little bit of shoulder pain today. Let's make sure that we monitor it on our shoulder articulation exercises."

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David: So that's one way is just verbally talking about it. And then we would put a note on the person's workout card. So what we've done in the past before, Lawrence, is we've had an additional sheet of paper where basically tacked onto the back that we would flip to and we would write the dates and just write what the issue was that the person was dealing with, so that our trainers down the line can touch base on that. So they can say, "Hey, I noticed last time you were in, you were getting ready for a race," or "Your right shoulder hurt," or so on and so forth. And then our next trainer can kind of be in the loop, so to speak. So that's really the way that we would do it, quote-unquote on the training floor, would be communicating with the other trainer that's there if you're in a group and also just putting notes on that person's card.

David: And now, there's different ways that you can do this. You can use an additional sheet of paper. One thing that we've done for some people is that we've actually added boxes on the workout card itself. So we have the workout card and then we have a column on the right side that has 10 boxes in it that just says dates and you can put the date and whatever notes you have for that date so that the trainer can see on that same workout card what issues the person's been having or what updates there are.

Lawrence: Awesome. Sorry, were you going to go on? I was going to a couple of questions on that, but if you had more to say.

David: Yeah. So I also have some stuff that we would do off the training floor. So like I said, those are things that might happen when you're on the training

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floor, you're writing a quick note or you're sharing information with another trainer. Off the training floor, I know we've talked before about our L10 meetings. We use Traction and have a weekly meeting with our L10. A part of L10s is what's called customer employee headlines, and any issues that are pertinent to the whole team, you might drop into a headline. So not only have I written a note and told my teammate on the training floor, but there's four other trainers that work with this person, so I'm going to put a headline up that says here's what so-and-so was dealing with on Tuesday, so that now everybody's in the loop verbally but I've also noted it on the card, so we're doubling up in that regard so we really can't miss it.

David: And then outside of that, from a long-term perspective, we've talked about progress assessments that we do here before. And one of the questions that we have in there is what injuries do you have? What issues are you having? And so from a long-term perspective, we can look back and say, "Hey, I know your left shoulder has been an issue in the past. Is that still something that's bothering you? Is it better? And can we actually erase it from the injuries that we're actually having to work around for you?" So from a long-term perspective, now we start to introduce that assessment workout where we can update at the bottom of their routine what injuries did actually have or what goals do they have and we can constantly be updating those. So from a long-term communication perspective, you have that.

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Lawrence: How does that look like on the card, the progress assessment, how do you record that on a card?

David: Sure. The progress assessment, we actually have an additional sheet of paper.

Lawrence: Great.

David: So, the additional sheet of paper has a few questions that we think are important around goals, and injuries, et cetera and we just go through those same questions every single time somebody does an assessment and we're going back and comparing it to previous workout cards. So, Lawrence, I literally had one yesterday with a woman and she had been having knee pain on an exercise and shoulder pain on another and she goes, "Knee pain is still there, shoulder pain is completely gone. I don't think we have to worry about anymore." And then I had just put a note on that so that moving forward we no longer have to put, monitor for shoulder pain or make an adjustment on this chest press or whatever the case may be. And, that's going to happen whenever they finish a workout card, so every two to three months they'll do an assessment.

Lawrence: Got it. Cool. And then you also use Slack, don't you, as well on top of all those other mechanisms?

David: Yeah. So, everything I just touched on basically doesn't require technology. So, if you want to get into technology, using things like Slack is a great way, so you'll get a Slack channel. So for us, each location has a Slack channel that they might send out information on around clients or

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issues. And then, we also have a software called HubSpot and that can keep kind of long-term notes and reminders on people. So, it's definitely a multifaceted approach without a doubt.

Lawrence: Awesome. And, sorry, I don't know if you said it there, but you have channels set up for individuals and locations in Slack as well, don't you, so you can really make sure that whatever issue a client is having is well communicated across the business, essentially?

David: Yep, exactly. So if I have to direct message a ... If we have a client that trains at both Plymouth and Chanhassen for example, I can send a direct message to somebody at Plymouth to share it with the Plymouth team, whatever the problem was with that person.

Lawrence: Yeah, exactly. Way better than doing a send all on email to everyone when not everyone needs to know about it, which just causes people to be overwhelmed by unnecessary information and emails and such.

David: 100%. We've basically transitioned to as far as within Discover Strength communication, 99% of our communication is happening over Slack and 1 or 2% is happening over email. We basically said use your email to externally communicate with clients and Slack is going to be if you have anything, Discover Strength or Discover Trainer-related.

Lawrence: Yeah, I think that's great. I think the more you reduce email usage, the better really in that context. All right, cool. So, right. So then let's just talk about the mechanics of the workout card and sharing information. So obviously, on the workout card you have a client's workout and then you

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have sections for notes which are dated, and then you can take notes. So, for instance, one of the examples you gave me was, let's say, I've got here 28th of January 2020, you could just write if you're doing American way, 01/28/20, hurt right shoulder, modified routine. So, you keep it really brief. Do you want to just elaborate on what I said there in terms of how you capture injuries, workout challenges, and other information from clients on their card?

David: Yeah. So as far as how it's structured, we have their goals, and injuries, and general notes kind of at the bottom of the card, and then we've built-in, like I said, a column that has any things that come up over the course of their time on this card. Okay. So that's going to be anything from an injury, to something that's come up in their personal life, to a race that they're doing. There's all sorts of stuff that we would put on there.

David: And that is, you're spot on with what you said as far as, we might just put a note that says shoulder bothering them today, modified workout. And then when you actually look at the card, we write all of our workout cards in pencil, so what I would do as the trainer is when I did that, I'd go in, I'd erase whatever it is I needed to, and make the actual adjustment. And so it's pretty clear for me to see if I pick up this card the next time and see that note, I can see exactly where the person actually modified the card because there's something that's erased, there's a machine that's range of motion or weight has been adjusted, so it becomes pretty clear.

Lawrence: Are there certain things that you don't record? For instance, let's say someone comes in and they're tired and so they don't really give it their

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all. Maybe they're feeling a bit under the weather or when they've also got right knee pain, let's say they've got four or five things, would you write it all down? I mean, how do you know when to not write something down? What are the kind of criteria for what gets added to that card?

David: Yeah, so that's going to be a judgment call 100%. But, you bring up a good point, Lawrence, that's if somebody ... I had a client a week ago who didn't sleep for basically the entire night before her workout and she was performing pretty poorly through her first three or four exercises, and I just asked her, "Have you been sleeping much? Are you really stressed? What else is going on in your life right now?" She was like, "I didn't sleep a wink last night." And I was like, "Okay, that makes sense." So I literally wrote into her card, I basically stopped recording repetitions on things. I put a note that said, "Didn't sleep at all last night and going to leave all the weights the same."

David: And I just communicated to her, "Today very well could be a fluke where you're just completely out of it and you're not performing that well, so I'm going to leave all your weight's the same for next time." And, the next time she comes in and she still performs poorly, the weights are probably just off, but there's a good chance that that day she was just completely out of it. And so, I literally wrote that note on the side that said, "Didn't sleep at all. That's why I didn't adjust any of these weights down."

Lawrence: [crosstalk 00:10:46] Sorry, go ahead.

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David: I was just going to say, otherwise, a trainer is going to look at that and be like, "Okay, they did 20 reps and their goal was to get to 30. The weight should be reduced. Why didn't David reduce any of these weights?" And so that way it's clearly communicated to them.

Lawrence: Okay. So they just need context, basically. And then like you say, it's just a judgment call. There's no these are the only things you can write in here. It's you could write basically anything and it's based on your judgment.

David: Exactly. There are times where we've gotten way too many notes on the card where it starts to like, there's notes down every margin and surrounding every part of the card and it just starts to look really sloppy and hard to read. But that is by far the exception, especially now that we've added these boxes down the side where you can kind of keep some other notes. But that was definitely an issue in the past or a couple of times where we said, "Hey, you can't just fill the margins with random paragraphs."

Lawrence: That's so funny. That takes me back to my Keiser training days because Keiser training have workout cards that might not be too dissimilar to yours. And when I first got into training and I used to really think that all the little variables mattered so much and I would split hairs to no end, and I would go in and do my workout and every single detail of that workout was recorded on that card, in terms of ... And we can talk about tracking performance in a moment, but I would track everything. And I would write down kind of how I felt during each set. And I just put so much info which

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was just bloated and not useful and just overwhelming, and it was not indicative of whether I was getting stronger or building muscle mass.

Lawrence: Because as you know, having done this for so long, David, when you're training it's like you can't look at someone from week one to week two. You have to take a bird's eye view and look at their training over a ... I don't know how you guys would think about this at DS, but I'm thinking you have to look it over a 4, 8, 12-week process to actually see if certain things, certain events are actually really taking a toll on their progress. But you can't do it from workout to workout because it's just incredibly complex. Is that fair for me to say? Is that how you guys think about it at DS?

David: Yeah, I would say that's fair. We've very rarely take into account external variables. So the example that I gave of the person that didn't sleep the night before, I will just put that note in there. But for the most part, we'll have people come in and it's a total crap shoot. They might tell us, "Hey, I barely slept last night," and they improve on half their exercises. So it's not necessarily a super clear link between whatever they tell us at the beginning of the workout, whether it's stress or sleep or whatever the case may be, and how they actually perform. I more put that note because after the fact I said, "Wow, she's performed worse on every single exercise. Is something going on?" because going into it and trying to guess, okay I'm doing a PM workout versus an AM workout, and I got this much sleep, and I'm a little bit stressed, and it just becomes a little bit too much. Yeah, you're splitting the hairs for sure.

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Lawrence: Yeah. And it's not useful to anyone, the client, the trainer. Yeah. It's funny because you're again, you're reminding me of I would have like a really stressful day in the office back in London, and I'd go to the gym and it would be like, right, I just need to tick the box. I just need to go because if I don't go, I won't go till X day and be really annoyed at myself. Even if I'm not in the most motivated space in my mind to train, and I would go and I would have personal bests on everything, or PRs, you guys would say probably, on every machine and the best workout I've ever had in my life. And yet, I went in feeling exhausted mentally. It's so funny how that can happen and it doesn't always go ... Like we can get worried if someone like you say, is sleep deprived or stressed or what have you. So you just can't look at these things in isolation, workout to workout.

Lawrence: So. Okay, awesome. That was good. So let's talk about tracking data on performance for a sec. So what do you guys track there? Do you track reps, time underload? What are you focused on there?

David: So, we're always tracking weights and reps. Now, that's going to be kind of under the umbrella of a lot of different protocols that we can do. So, I mean technically we have protocols that are time underload, but we have normal 2/4 cadence. We'll do super slow with the 10/10. We'll do a combination where you'll do 10 seconds down, hold for 10 seconds, up for 10 seconds. And we've based all of our rep ranges off of time underload, essentially. But it really just depends on the protocol that you're doing. But to simplify it as much as I can, we're writing down the weight that you're doing and the number of reps or the time underload,

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depending on the protocol that you actually performed. And then once you hit the goal number of reps or the goal time underload, we increase the weight for next time.

Lawrence: And if it's, let's say just for argument's sake, you're doing a 10/10 protocol and a chest press, will you have on the workout card chest press 10/10, and then a separate box for reps and load? Is that how? Because otherwise, you need to have that cadence written in there somewhere for that protocol?

David: Yeah. So we write the machine or the exercise are doing and the protocol in one box, and then we write the seats of the machine and the next box, so what's the person's seat setting on this particular machine because that can greatly affect things. And then from there, it's a bunch of boxes that have a slash down the middle and we put the weight on one side and the reps on the other, and we always fill in the box for next time of what their weight should be.

Lawrence: Got it. Cool. Yeah. And if people listening to this thinking, I know, Wayne, you were interested in seeing a snapshot of this. Obviously, as many of you know, Discover Strength for opening a franchise for their business, so a lot of this information is proprietary. So we're very fortunate that people like David, Luke, and Hannah and so on are willing to share some of this information. But obviously, there's a limit to what can be shared. So I just wanted to explain that to people. However, with the amount of information that David has shared and some of the stuff that's already in the membership, I think it's very simple now to create workout cards that are

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going to be a good fit for your business. And obviously, we'll probably talk about a few more things on this call as well to give you a little bit more information to help you do that.

Lawrence: So, David, that's awesome. So what about when it comes to things like, so you've got ... Okay. So, you said there already, you've got the protocol there, so the protocol account for any advanced techniques you might do as well, is that right? So, let's say, for instance, someone's doing ... Okay. Here's a better question. If someone's doing a 10/10 chest press, and I know that might not be something you guys do, I'm just throwing a hypothetical out there, but it's a 10/10 but then you're also doing assisted reps or drop sets. How do you record the advanced technique as well?

David: We don't.

Lawrence: Right. Why?

David: We've stratified all of our clients, essentially, into an intensity level. So we say, this person, anything goes, do whatever you want, they'll go [inaudible 00:18:32] This person will go to momentary muscle failure and they will stop, and then you have this other person over here who will do 12 reps, it'll look easy and they'll set it down and be done and we'll slowly progressively overload that person. That's the spectrum of intensities that we have, is anything goes to basically the most therapeutic, slow and controlled, lightweight, looks easy, set it down, done type of intensity. And our trainers are basically given the freedom to do whatever they want at

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the end of the set, as long as it fits within what we have defined those intensities to be.

David: So if our studio manager is watching one of their trainers train somebody who is that highest intensity and they're doing some super easy finisher, they'll say, "Hey, that's not tough enough. You've got to do a tougher advanced overload technique." Or if it's a really light person and a trainer is trying to crush the person who wants the therapeutic type of training, they're going to say, "Why are you trying to kill or old man?" So that's something that we more leave up to our trainers. We try to give them the framework to work within, and then we tell them, these are all the different tools that you can use at your disposal and go use them.

Lawrence: Right. And is the intensity level determined by ... I think the questionnaire that Luke described to me once, where you would ask a client what intensity level they prefer and it might be like three questions. Maybe you know this off the top of your head, David, like do we push you hard enough? Do we not push you hard enough? And invariably, people like being pushed harder, right? Is that how you ascertain that information to then help you understand what intensity level each client requires?

David: Yeah. We'll basically use a couple of filters. So the one that Luke touched on, it sounds like, is our client-based filter of, what is their opinion on the matter? And that's really the most important one, frankly. Because if our client wants us to push them harder and we refuse to do it, they're just going to go find another place to workout. So we want to make sure that we're still within the framework of what we want to do, say an efficient

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exercise, but we still want to execute on giving them the intensity that they so desire. So that is most people. They're going to say, "Yeah, push me a little harder."

David: And then the other side of it is the trainer determined side. And this is pretty rare, but there will be times where we have a client who wants to be pushed really hard, but they don't seem to be able to safely be able to get there if that makes sense. So no matter how hard I push them, I'll try to push them as hard as they want to be pushed, but they invariably break form or let the weights slam down, or do something else that leads me to believe that this person's going to hurt themselves, then it's important for me to broach that topic with the client and say, "I don't think we should push you this hard. Because every time I try to push you this hard, I think you're going to hurt yourself."

David: So that's the second side that comes up less often is, if we think that there's that risk there, but for the most part, it's exactly what Luke said. Most people we ask them, "Is it tough enough? Do you want me to push harder or less hard?" And most people say, "It's perfectly tough enough," or, "I want to be pushed even harder."

Lawrence: Do you have any other filters as well, or is that it on the filter side?

David: That's really it, yeah. What does the client want and what does our trainer think they can do safely?

Lawrence: Yeah, that's great. Is that because if you start going into pushing someone harder with, I don't know, heavier loads or advanced techniques that

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you've noticed that some people, their form will just come apart if they start trying to go there?

David: Yeah, there's just some people that don't take coaching as effectively, and so you try to coach them to keep great form. But no matter what, when they start to get stuck on leg press, whether I'm doing 12 reps or 20 reps, they start to throw their hips in the air, expose their low back, and potentially harm their low back. And so, even no matter how much I coach them, keep your hips down, hips down, hips down, they will invariably break form. And like I said, if you get to that point where you're coaching them like crazy and they still can't make the correction, you may have to have that tough conversation of I think you're going to hurt yourself if we keep doing this.

Lawrence: Yeah. And do you think that this is partly due to, it may be a matter of people not listening and paying attention and doing what they're being told? But then also it could just be like a very low skill level. Like if genetically they're just not very in control of their body and their motor skills despite that's going to improve over time with strength training, which it does obviously. And, to me, there's just some people that they just don't have that same body control perhaps.

David: Yeah, that may be true, but I don't necessarily know if I would be able to identify if that person just has poor motor control. I also don't know if I had that ... Like would that be comforting to the person or would they be like, thanks for letting me know that I have poor motor control? Do you know what I mean? I would most likely to say, "Hey, this is not safe. You

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seem to break form at the ends and let's make an adjustment and try to play the safety card a little bit more." I don't know how much I would ... I mean, maybe other people have had success with bringing up a less skilled person from a motor perspective, but I think that that seems like a harder sell to a client.

Lawrence: Oh, I agree. I think you have to be very careful always how you articulate this. I was thinking more of a theory as to why some people behave in that way and that you and I would share, but not to a client necessarily.

David: Yeah, I-

Lawrence: What about ... Sorry, go on here, David. Sorry.

David: I mean it's a good question. I would guess I was just going to say in my experience I haven't necessarily ever thought that somebody was having trouble with that because of a poor motor skills perspective, and it's almost always been just they seem like they're not coachable. That's what my experience has been.

Lawrence: Got it. Yeah. I mean you're probably right and it's super interesting. So what about, if for instance, you're doing bilateral work and you need to write on the card that they're doing just one side? Does that fall in ... How do you record that on the cards? Like when you're doing an obscure exercise like that?

David: Yeah, absolutely. So, depending on the protocol, so we'll have some single arm or single leg protocols. So literally, for the protocol, it might be

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written single leg, 1x12. And so, then you know in that regard. And then for weight and reps, we can break it into four weights. We'll just write L and R in the box. You've got to write pretty small. We'll literally write L150, R130, and then in the reps box, we'll write how many reps they did for their left arm and their right arm.

Lawrence: Yeah, I suppose just say unilateral and not bilateral. And I appreciate you not correcting me. But yeah, that is exactly how I record it for myself in that way. And just another question on that. Do you ever have a preference for starting someone on their stronger side first? Or, do you alternate over workouts? How do you decide on whether they start on their left or their right, just out of interest?

David: I don't know if I've ever consciously tried to decide whether they do their strong or their weak leg first, to be completely honest with you, I don't particularly care. If they're training their ... If we're going to the point of failure, right? If we're not doing that super light intensity, we're just setting it down at 12, that weaker leg is going to adapt to the highest ability that it can if you're training it to muscle failure and same with the stronger leg. Hopefully, the weaker leg will catch up. So that would maybe be an argument for starting with the weaker limb. But I also think you're coming back to splitting hairs at that point.

Lawrence: I agree. And isn't there if you're training one side, it strengthens the other side anyways? And there's quite a lot of evidence around that.

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David: [inaudible 00:26:59] transfer. Yeah. So we'll try to encourage people who have an injury to one leg or one arm and they can't do any exercise on it to still do single arm or single leg exercise because of that phenomenon.

Lawrence: Good stuff. All right. So, okay. So on your workout card, over what period of time do you record up to? What number of weeks would a single card record up to?

David: It's usually 16 to 20 workouts. So that would be, if you're training twice a week, 8 to 10 weeks or 16 to 20 if you're only training once a week, so once a week, obviously, it gets a little bit of a longer period of time, but usually 8 to 10 weeks.

Lawrence: Okay. And, just for completeness, you actually have a physical file in the studio, which has the printed client workout cards and these are exported from the Google sheets into PDFs. So if people want to know how exactly they can go about doing this, they can just create the Google sheet based on what they've heard from this podcast and Luke was kind enough to share some of your workout templates. So again, I'll link to that for The Membership and people can actually check out those templates and use them to help them create their workout cards for their clients. Is there anything else that you want to mention that you think you guys do that we haven't talked about in terms of how you essentially collect client information and share that around the business to make sure that the client's getting ultimately the best experience? Is there anything else that comes to mind?

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David: With having clients that work between multiple locations, having a ability to scan and send over someone's card from one location to another is another way that we'll quote-unquote communicates or share information because all that person's notes will be on the card from the other location. So it's an important thing to prepare other locations for a client that's coming in. So that would maybe be one other one if you're working with multiunit. But that might be the only other thing that I maybe didn't touch on.

Lawrence: Yeah, and it's cardboard, these cards, right? They're actually, is a cardboard that you're using?

David: The cards are a card stock, so it's just a thicker piece of paper.

Lawrence: Right. Okay. And then do you have clipboards for the trainers to kind of be able to actually adjust and make notes on the fly?

David: Yeah.

Lawrence: Yeah. Because otherwise, you're leaning cards against machines and walls and stuff to try and get a flat surface on you. So, that's probably a common sense thing really. I guess most members are going to have that in play.

David: Sure.

Lawrence: Yeah. Okay. I'm just seeing here if there's anything I missed that we may want to touch on. Oh, yeah. Do you have an agreed glossary for, there's different acronyms or abbreviations you might use at DS, which you could

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share, which might make it easier for, I guess, members to knowledge in their business? Is there any kind of acronyms or abbreviations that come to mind that you might use?

David: I actually don't necessarily know. I don't think that we have a glossary. I know that we have terms that we use, but that's almost more like tribal knowledge. There might be a few of them in our exercise menu. But I also know there's definitely some that aren't in our exercise menu and it's just shorthands that we use, like limited range of motion is L-ROM, like things that aren't codified anywhere, but everybody understands like what they mean at DS.

Lawrence: Yeah. I think it should be useful to have a glossary in your business just so that everyone's on the same page. Because I suppose if you get a new trainer in and they look at that and they're like, "What the hell does that mean?" That it would help perhaps alleviate that confusion in the beginning. So I was just thinking that might be a good idea for the members in their own businesses. And I know that you guys have codified every process in your business. You're famous for SIP and WIP, which is summer intensive internship program and winter intensive internship program. And, I know that that codification is very much inspired by attraction and Luke's explain that to me and how you do that across your business so that everyone in the organization is on the same page with regard to all the different processes, so you're all talking about exactly the same thing, which is so important when we're trying to have constructive discussions.

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Lawrence: So, that's something that the members should take away. Luke and I are actually doing a separate series and a membership called The Traction Series and I really encourage all the members to think about implementing traction in their business and follow us along in that series. David, this has been great. I actually thought this was going to be briefer and I thought it was going to be so lacking in detail to almost make it not worth doing, only because you've told me so much already and I've put it in The Membership. But there was so much extra stuff you shared on this I think is so useful. So I just want to say thanks for again, taking the time to join me on The Membership.

David: Yeah, I'm glad you found it helpful. I appreciate it.

What is your number one business challenge? [Tell me HERE](#)