

STUDIO PLAYBOOK · FREE

21-Day Migration Playbook

How to switch coaching software without losing clients.

Most coaches who want to switch coaching software get stuck on three things: they don't know the right sequencing, they think they'll lose clients during the switch, or they underestimate the data-export problem until they're stuck. This playbook walks the 21-day sequencing that's worked for coaches migrating from Trainerize, TrueCoach, Everfit, MyPTHub, and FitBudd.

PHASE	DAYS	WHAT HAPPENS
Export	1 – 3	Get your data out of the old platform
Pilot	4 – 7	Run new platform with 2 – 3 willing clients
Announce	8 – 14	Tell your full roster — quality framing, not cost
Migrate	15 – 18	Roll out in tiered waves
Cancel	19 – 21	Final export + cancel old platform

Most coaches who use this playbook report 95%+ client retention through the transition.

Why this playbook exists

Most coaches who want to switch coaching software get stuck on one of three things:

1. They don't know the right sequencing (so they panic-migrate or never start)
2. They think they'll lose clients during the switch (most don't if the playbook is right)
3. They underestimate the data-export problem until they're stuck

This playbook walks the 21-day sequencing that's worked for coaches we've talked to migrating from Trainerize, TrueCoach, Everfit, MyPTHub, and FitBudd.

PHASE

Days 1-3: Export everything

Goal: get your data out of the old platform before anything else.

- Trainerize: Settings → Account → Export Data → CSV (clients + programs + check-ins separately)
- TrueCoach: Settings → Data Export (Pro tier and above; Starter must email support)
- Everfit: Profile → Account Settings → Data Export
- MyPTHub: Trainer Dashboard → Settings → Export
- FitBudd: Must email support — typically 48-72 hr turnaround for full data dump

Save all exports to a folder on your computer. Even if you don't end up switching, this is a one-time data hygiene exercise that protects you from any platform-side incident.

Common gotcha: programs export as a flat list, not as your weekly templates. If you have 50+ custom programs, plan extra time to re-organize them on the new platform.

PHASE

Days 4-7: Run the new platform in parallel with 2-3 willing pilot clients

Goal: validate the new platform with low-stakes test cases before committing.

Pick 3 willing pilot clients:

1. Your most engaged client (highest NPS, will give honest feedback)

2. Your most reliable check-in submitter (will exercise the check-in flow first)
3. Your most demanding client (if it works for them, it works)

Onboard them on the new platform while keeping them on the old one. Send them messages like:

"Hey [name] — I'm testing a new app for the practice. Would you be willing to also try it for the next two weeks alongside what we're already doing? Honest feedback either way."

After 2 weeks, debrief with each pilot. If they prefer the new platform: green light to roll out. If they prefer the old: figure out why before committing.

Common gotcha: clients hate switching when they feel like guinea pigs. Frame it as YOU testing, not THEM.

PHASE

Days 8-14: Announce to your full roster

Goal: communicate the switch in a way that increases retention, not decreases it.

Send a single announcement email or in-app message to your full active roster. Template:

Subject: An upgrade to your training experience

Hey [name],

Quick update on the coaching practice. I've been testing a new platform for the past two weeks and I'm switching all clients over starting [date — give 7 days lead time].

Why: [pick the honest answer — flat-fee pricing means I can serve more clients at the level you deserve / better AI memory means your programs get sharper over time / true white-label means you're using my brand, not someone else's, etc.]

What changes for you: nothing on the substance. Same programs, same check-ins, same me. The interface is different — I'll send install instructions next week and walk you through the first session.

What stays the same: your billing relationship with me, your training history (it ports), your subscription terms.

Reply with any questions.

[name]

Common gotcha: if you frame it as a cost-saving move FOR YOU, clients hear "platform problem you're making my problem." Frame it as a quality-of-service move FOR THEM (better AI / better app / faster check-in flow / etc).

PHASE

Days 15-18: Migrate active clients in tier waves

Goal: roll out without overwhelming yourself or losing momentum.

Wave 1 (day 15): your top 5 highest-spending clients. Give them personal install attention. They become your first social proof.

Wave 2 (day 16-17): your next 15-20 most-engaged clients. Send install link with the personal note tested in Wave 1.

Wave 3 (day 18): everyone else, including dormant clients. Use the dormant outreach as a re-engagement opportunity ("Switching platforms — wanted to check in. Are you still active in your training, or should we pause for now?").

Common gotcha: trying to migrate everyone in one day burns you out and tanks the install experience. Wave it.

PHASE

Days 19-21: Cancel the old platform

Goal: complete the switch and archive the old data properly.

- Day 19: confirm 100% of active clients are onboarded to the new platform
- Day 20: download a final fresh export from the old platform (in case anything updated)
- Day 21: cancel the old platform subscription. Keep the export CSV archived for at least 12 months in case you need to look up historical data.

Common gotcha: canceling on day 19 before everyone's migrated. Wait until day 21 even if it costs an extra few days of subscription overlap. The cost is trivial vs. losing data access during a missed migration step.

PHASE

What to expect after Day 21

- **Week 4-6:** clients ask 1-2 questions about the new app. Respond fast. Build the FAQ as you go.
- **Week 6-8:** check-in compliance often INCREASES on a fresh platform (novelty effect + better UX).
- **Week 8-12:** you stop noticing the switch happened. It's just your practice now.

Most coaches who migrate this way report 95%+ client retention through the transition.

Common mistakes that cause client loss

1. **Migrating without telling clients first.** They get a confused install link from a name they don't recognize.
2. **Charging for the switch.** Don't bill them for the migration. Eat the cost yourself if there is any.
3. **Killing the old platform too fast.** 21 days isn't a deadline; it's a guideline. Take 30 if you need it.
4. **Migrating during peak training season.** January and September are bad migration windows for fitness coaches. Mid-season (March-April or October-November) is calmer.
5. **Trying to migrate in <14 days.** This works for <10 clients only. With a real roster, the rushed timeline costs you clients.

PHASE

What this playbook deliberately does NOT cover

- Pricing comparisons between platforms (see vantagedigital.dev/compare-coaching-apps for that)
- Feature comparisons (see vantagedigital.dev/vs/ for that)
- Recommendations on which platform to switch to (depends on your practice — see vantagedigital.dev/cadence/quiz)

This playbook works for migration TO any flat-fee coaching platform, not just Cadence. The sequencing is the same.

About this playbook: Created by the Vantage Digital studio (vantagedigital.dev), the team behind Cadence — a flat-fee white-label coaching app. We share this playbook free because the migration friction is what keeps coaches stuck on per-client platforms even when the math doesn't work for them. If Cadence is the right fit for you after migration, we'd love to have you. If not, the playbook still works.

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Built by the Vantage Digital studio.

We're the team behind Cadence — a flat-fee, white-label coaching app. We share this playbook free because the migration friction is what keeps coaches stuck on per-client platforms even when the math doesn't work for them. The sequencing in here works for migration *to any flat-fee coaching platform*, not just Cadence.

If you want to see what Cadence actually costs at your roster size:

vantagedigital.dev/compare-coaching-apps

Or run our 60-second match quiz:

vantagedigital.dev/cadence/quiz

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