




***COACHING BUSINESS
SYSTEMS AND TOOLS***

THE BUSINESS OF COACHING

In this Business of Coaching session, we will:

- Go through 6 simple systems that are foundational to creating a sustainable and scalable business
- Explore tools that support these systems and automate key tasks in your business
- Have Q&A time to ask your specific systems questions



**“DO I REALLY NEED THESE
SYSTEMS WHEN MY BUSINESS IS
NEW OR SHOULD I WAIT UNTIL
MORE MONEY IS COMING IN?”**

SYSTEM 1: TASK MANAGEMENT

What's not scheduled often doesn't get done.

Tools to use:

Asana

Notion

Trello

Monday

Basecamp

SYSTEM 2:

PAYMENT PROCESSING

How do clients pay you for your services?

Tools to use to get started:

Paypal

Stripe

Square

SYSTEM 3: SCHEDULING

How do clients schedule time with you?

Tools to use to get started:

Calendly

Acuity

TimeTrade

SYSTEM 4: CLIENT INTAKE

How do clients get started working with you?

Tools to explore:

Mailchimp

Click Funnels

Active Campaign

Monday

Convert Kit

CLIENT ONBOARDING SEQUENCE:

Email 1: Welcome! Here are your next three steps

Email 2: Common Q's about the coaching process

Email 3: Schedule your first session

Email 4: The portal is open for you

Email 5: First session reminder + link

SYSTEM 5:

CLIENT MANAGEMENT

How do you keep track of client sessions, tasks, commitments, etc?

Tools to use to get started:

Google Drive

ZenDesk

HelpScout

SYSTEM 6:

FINANCIAL TRACKING


How do you keep your finances organized?

Recommended tools:

QuickBooks Online

Xero Accounting

Wave Accounting



**WHAT QUESTIONS DO
YOU HAVE ABOUT
BUSINESS SYSTEMS?**