

# NEW COACH

# CHECKLIST

SUGGESTED COMPONENTS TO HAVE IN PLACE FOR EVERY COACH  
(NOT PROFESSIONAL ADVICE)

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BUSINESS E-MAIL USED FOR ALL COACHING RELATED BUSINESS

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REGISTER YOUR BUSINESS WITH YOUR STATE

OPEN BUSINESS CHECKING ACCOUNT WITH EIN

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ONLINE CALENDAR

- I use the Google calendar

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ONLINE SCHEDULER

- I use Calendly (Free version gives you 1 event)

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ONLINE AGREEMENT AND PREP FORM

- I use [JotForm](#) (first 5 forms are free)

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ONLINE PAYMENT COLLECTION

- I use PayPal

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EMAIL TEMPLATE FOR WELCOME PACKET

- I use Gmail

(E-mail me if you'd like to see the welcome e-mail I send to my clients.)

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TRACK INCOME, EXPENSES AND COACHING HOURS

- [I use Google Drive](#) (click to see template)



# SAMPLE FORMS

Use as inspiration to create your own forms

## 1:1 Coaching Retainer Agreement

This link will take you to my Coaching Retainer Agreement in JotForm. As part of the onboarding process, clients sign this agreement and set up their automatic payments all in this one step.

## My Coaching Prep Form

This coaching prep form is sent automatically to me clients 24 hours and 1 hour before their scheduled sessions. It comes right to my inbox once they hit the “Submit” button and they get a copy sent to their email as well.

## Group Coaching Agreement

This link will take you to my Group Coaching Agreement in JotForm. As part of the onboarding process, clients sign this agreement and pay the group coaching fee in this one step.

## Have Questions? Let's Chat

If you're ready to make your forms but would like some help, I'd be happy to chat. Use this link to hop on my schedule for a free 30 minute consultation.