COACHING STARTER · QUICK START

The short path to live

Eight steps, about 2 to 3 hours in all. Do them in order. The full guide has the details for each one.

20 MIN

1 Fix what the install leaves behind

Re-pick the stage on the three stage workflows, set Home as the home page, publish the 4 forms, and set both calendars Active with public booking on.

Guide: Step 0

15 MIN

2 Make booking work

Set your hours, connect Google or Outlook (required, or no times show), add your meeting link, and turn off the built-in calendar emails.

Guide: Calendars and booking

60 TO 90 MIN

3 Make it yours

Replace the Cedar Path sample on every page, add your photo and offers, replace every [bracket] in the emails and texts, and fill in Privacy and Terms.

Guide: Make it yours

15 MIN

4 Set up email sending

Connect your sending domain, set your from-name, and put a real street address in the agency profile.

Guide: Email, texts and reviews

10 MIN

5 Publish the site

Publish all 15 pages, turn the site on and connect your domain.

Guide: Make it yours

15 MIN

6 Turn on the workflows

Booking, then Cancelled. Then Free guide, Newsletter, Contact. Then After the call, Onboarding, Wrap-up, Alumni. Texts last, after A2P approval.

Guide: Workflows

20 MIN

7 Launch the website assistant

Add your own facts block, update its instructions and chat identity, attach it to your site, then click Publish widget.

Guide: AI assistants

20 MIN

8 Run the go-live test

Walk the 10-point test on your live domain with your own email and phone.

Guide: Go-live test

Start this today. Start A2P text registration on day one. Carrier approval can take 1 to 3 weeks, and texts stay blocked until it clears.