SNAPSHOT SETUP GUIDE · COACHES

Coaching Starter

Setup Guide

Everything you need to turn the Coaching Starter into a live, branded client-attraction system: website, free guide funnel, booking, follow-up and AI assistants.

15	11	21	2
website pages	workflows	email templates	AI agents

Setup time	**Inside**	**Updated**
2 to 3 hours	Quick Start + full guide	November 2026

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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.

What you're setting up

The Coaching Starter gives a coach a working client-attraction system in about 2 to 3 hours of setup: a website, a free guide that builds an email list, two booking calendars, and follow-up that runs on its own. Every automation arrives turned off, so nothing reaches a real person until you say so.

Part	What's included
Website	15 pages: Home, About, Work With Me, Free Guide, guide thank-you, Book a Free Call, You're Booked, Client Sessions, Journal + 3 sample posts, Contact, Privacy, Terms
Forms	Free Guide, Contact, Newsletter, Client Intake
Calendars	Free Clarity Call (30 min), Client Session (60 min)
Pipelines	Leads (New, Engaged, Call booked, Deciding, Became a client) and Clients (Onboarding through Wrapping up and Alumni)
Emails	21 branded templates: guide delivery + 4-email welcome series, newsletter welcome, contact auto-reply, ready-to-talk nudges, booking confirmation and reminder, cancel and rebook, after-call thank-you and day-7 nudge, client welcome, 30-day check-in, wrap-up review and referral, 90-day alumni check-in, plus 3 ready-to-send campaign emails
Automations	11 workflows (see Workflows)
Text messages	8 SMS templates, sent only to people who opt in
AI	Website chat assistant and an AI phone receptionist, both off until you turn them on

Work through the sections in order. Step 0 matters most: a few settings don't survive the install and must be fixed before anything goes live.

Step 0: fix what the install leaves behind

Do these first, in this order. Each takes a few minutes.

1. **Re-pick the stage on three workflows.** The install clears the pipeline and stage on any workflow that starts when a card moves. Open each one, click the trigger, and choose:
   - Calls | After the call: Leads pipeline, stage Deciding
   - Clients | Wrap-up: Clients pipeline, stage Wrapping up
   - Clients | Alumni: Clients pipeline, stage Alumni
2. **Rename the workflows.** Each arrives with "(Import)" on the end. Remove it so the names stay clean.

3. **Set the home page.** Sites > Coaching Website > Pages. The install marks About as the home page. Open the Home page's menu and set it as the home page, then set its URL slug to home.
4. **Publish the forms.** Forms arrive as drafts. Open Free Guide, Contact, Newsletter and Client Intake and click Publish on each. While you're in Contact, check the "What brings you here?" dropdown shows its 4 options.
5. **Turn on the calendars.** Calendar > Booking Pages. Both arrive Inactive with public booking off, and their links change to long IDs. For each: set it Active, turn public booking on, set the slug, and assign yourself as host. Slugs must be unique across your whole agency, so if clarity-call is taken, add your client's name (clarity-call-jane).
6. **Re-add the heading font.** Sites > Coaching Website > Settings > Code > Head. Paste the snippet below so headings use the serif font. It doesn't always travel with the install.

> **Leave the three stage workflows off until their stage is set.** With no stage picked they would fire every time any card moves.

```
<link rel="preconnect" href="https://fonts.googleapis.com">
<link href="https://fonts.googleapis.com/css2?family=Fraunces:opsz,wght@9..144,400;9..144,600&display=swap" rel="stylesheet">
<style id="coach-serif-headings">h1,h2,h3{font-family:'Fraunces',Georgia,'Times New Roman',serif !important;letter-spacing:-0.01em;}</style>
```

Pages and the site stay unpublished until you finish branding (next section). That's on purpose.

Make it yours

The website, the website assistant and the campaign emails come filled in as **Cedar Path Coaching**, a fictional sample practice (coach Maren Hale, Bend, Oregon), so the demo looks finished. Replace the sample with your own: name, story, credentials, offers and prices, photos, phone, city, the testimonials marked "Sample" and the three journal posts.

The other emails, the texts and the phone agent use square-bracket placeholders. Replace each one from the table below, then publish. Search for "[" on each page and in each email so none slip through.

Placeholder	Replace with	Where it appears
[Your Name]	Your name	Pages, emails, AI agents
[Your Business Name]	Your business name	Pages, email footers, SMS templates, AI agents
[YOUR COACHING TITLE]	e.g. LIFE AND LEADERSHIP COACH	Email header
[City, State]	Your city and state	Email footers, Contact page
[hello@yourdomain.com]	Your reply-to email	Email footers, Contact page
[yourdomain.com]	Your website address	Email buttons and footers
[Your meeting link]	Your Zoom or Meet room link	Booking emails, SMS, calendars
[Your meeting link or phone number]	How clients join a call	Calendar location, booking emails
[Your time zone]	e.g. Mountain Time	Booking emails and texts

Colors. The template uses a plum, blush and cream palette. Keep it, or swap these in Sites > Theme, the form Design tab and the calendar theme:

Primary #3A2C33 buttons, header	**Accent** #9C6B6B links, eyebrows	**Blush** #E8CFC8 highlights
Background #F6F1EC page sections	**Text** #2E2328 body copy	**Borders** #E6D7D1 lines, cards

The email templates have these colors written into them. If you change brand colors, update the header bar and button color in each email too.

> **Edit email text with care.** Each email's branded header bar and button color are written into its HTML. The visual email editor can drop those colors when it saves, which leaves the header text white on white. After you edit an email, open Preview and check the header bar and button still show. If they've gone, re-apply the colors above.

Copy. Rewrite the Home, About and Work With Me pages in your own voice, add your photo, and replace the three sample Journal posts (or unpublish them). Upload your free guide PDF and link it in the "Leads | Guide delivery" email and the guide thank-you page.

Campaign emails. Three one-off emails are ready in the Campaigns folder: a monthly letter ("three questions"), a group program enrollment email for a sample program called Crossroads Circle, and a New Year reflection. Rewrite them for your offers, point their links at your own pages, and send them from Email > Campaigns when you're ready.

Privacy and Terms. Both pages are written for a coaching practice and already include the text-message terms carriers check for A2P (frequency, rates, STOP and HELP, no sharing of mobile numbers). Fill in the date, your cancellation and refund policy, and how payment works, then have both reviewed by a qualified professional.

> **The Cedar Path policies are samples written for the demo, not legal advice.** Never publish them as your own policies.

Search listing. The Home page has a placeholder search title and description (Sites > Coaching Website > Home > Page Settings > SEO). Replace the brackets so Google shows your name and niche.

Publish. When the pages read right, publish all 15, then turn the site on and connect your domain (Sites > Domains).

Calendars and booking

Two calendars come ready: **Free Clarity Call** (30 minutes, for prospects) and **Client Session** (60 minutes, 24 hours' notice, for paying clients). Both use a left-text, right-calendar layout with a 15-minute buffer after each call.

1. **Set your hours.** Calendar > Availability. A fresh install has no working hours, so nobody can book until you set them. The Mon to Fri 9 to 5 button is a quick start; adjust from there.
2. **Connect your calendar (required).** Connect Google or Outlook before you share any booking link. The public booking page only shows open times once a calendar is connected. Without one, it spins and never shows times, and visitors give up. It also lets your busy times block bookings.
3. **Set the location.** In each calendar, replace "[Your meeting link or phone number]" with your meeting room link.
4. **Turn off the built-in emails.** Calendar > Settings > Notifications: turn off the built-in confirmation and reminder emails. The Booking workflow sends branded ones instead, so leaving both on means clients get doubles.
5. **Check the embeds.** Open the Book a Free Call page (/book) and the Client Sessions page (/sessions) in preview. Each should show its calendar. If one is blank, click the calendar block and pick the calendar again.
6. **Decide who sees Client Session.** It's meant for paying clients. Remove /sessions from the site menu if you'd rather share the link only with clients.

Email, texts and reviews

Email. Set up your sending domain (Settings > Email) so messages come from your own address and land in inboxes, not spam. Set your from-name to your name. Until then, test emails may come from a shared address.

Address and sender name. The platform adds a footer to every email: a mailing address and an unsubscribe link. The address comes from this workspace's profile (Settings > Workspace Profile > Address & region). If that's empty, emails fall back to the agency's address, so fill in your own street, city, state and ZIP. US law requires a valid mailing address on every marketing email; a PO box is fine. Also set your from-name, or emails show the agency's name.

> **What to expect when you test.** Workflows start about 90 seconds after a form is submitted, so wait two minutes before checking. Emails from a new sending domain often land in Gmail's Promotions tab at first.

Texts. The 8 SMS templates (Campaigns > Templates > Snippets, "SMS Templates") cover the guide welcome, booking confirmation, 24-hour and 1-hour reminders, missed call, new client welcome, session reminder and review request. To send texts you need:

1. A phone number in the workspace (Phone > Numbers).
2. A2P 10DLC registration for US numbers. Carriers block unregistered business texts, and approval can take 1 to 3 weeks, so start early.
3. Consent. Texts go only to people tagged SMS Opt-In. The tag is added when someone ticks the optional text box on the Contact form. Replace [Your Business Name] in that box with the name you register under, then paste the box's wording word for word into the A2P "How do contacts opt in" field. Keep "Reply STOP to opt out" in every message.

Reviews. Paste your Google review link into the "Clients | Wrap-up: review and referral" email and the "Review request" SMS template.

Alerts to you. When something needs your attention (a contact form message, a new client), the workflows create a task assigned to the contact owner, so it shows in your task list. If you'd also like an email or text alert, add a "Notify" step to those workflows after install.

Workflows

All 11 arrive off. Turn each on with **Publish and turn on** once its emails, calendar and (for texts) phone number are ready. The tag Call Booked is the key link: booking a call stops the lead follow-up emails.

Workflow	Starts when	What it does
Leads | Free guide: delivery and welcome series	Free Guide form submitted	Tags Guide Download, adds to Leads at New, sends the guide, then welcome emails on days 2, 4, 7 and 10. Stops once they book.
Leads | Newsletter welcome	Newsletter form submitted	Tags Newsletter Subscriber, sends the welcome.
Leads | Contact form: reply task and ready-to-talk nudges	Contact form submitted	Auto-reply, adds to Leads at Engaged, creates a reply-today task. If they chose "ready to talk": tags Ready to Talk, nudges on days 2 and 10 unless they book.
Leads | SMS opt-in from Contact form	Contact form submitted with the text box ticked	Tags SMS Opt-In.
Calls | Booking: confirmation and 24-hour reminder	Any booking	Tags Call Booked, moves to Leads at Call booked, sends the confirmation, then a reminder 24 hours before.
Calls | Text reminders (opted-in only)	Any booking, SMS Opt-In only	Text confirmation, then texts 24 hours and 1 hour before.
Calls | Cancelled: stop reminders and rebook	A booking is cancelled	Stops both reminder workflows, sends a rebook email.
Calls | After the call: thank you and Deciding nudge	Leads card moved to Deciding	Thank-you right away, day-7 check-in unless they became a client.
Clients | Onboarding and 30-day check-in	Tag New Client added	Moves to Became a client and Clients at Onboarding, sends welcome + intake form, creates a prep task, 30-day check-in.
Clients | Wrap-up: review and referral	Clients card moved to Wrapping up	Review and referral email, task to schedule the final session.
Clients | Alumni: 90-day check-in	Clients card moved to Alumni	Tags Alumni, check-in email 90 days later.

Turn-on order

1. Booking, then Cancelled (Cancelled needs Booking and Text reminders to exist; it already points at them).
2. Free guide, Newsletter, Contact form.
3. After the call, Onboarding, Wrap-up, Alumni (only after Step 0's stage fix).
4. SMS opt-in and Text reminders, once your number is A2P approved.

Your part. Two moves are by hand: drag a lead to **Deciding** after a clarity call, and add the tag **New Client** when someone signs on (or let a payment workflow add it).

AI assistants

Both agents arrive off. They use AI credits, so turn them on only once the workspace has credits.

Website Assistant (chat). Answers visitor questions in a warm, short style, saves contact details to the CRM and offers the Free Clarity Call. It points anyone in crisis to 988 or 911 and never gives therapy or medical advice.

1. Open the agent's Knowledge. Add a content block with your own facts (who you help, offers and prices, how sessions work, policies), then delete the "Cedar Path Coaching facts (sample business)" block. Blocks can't be edited, only added and deleted.
2. In Instructions & model, change "Maren Hale", "Cedar Path Coaching" and "Bend, Oregon" to your own.
3. In Chat widget > Identity, change the name, company, first message and welcome title from Cedar Path to your business. Set the colors under Appearance.
4. Check the booking action still points at Free Clarity Call. Re-pick it if it's blank.
5. Attach the widget to your site (Sites > your website > General > Chat Widget > Save Settings), test a few questions in Test & deploy, turn the agent on, then click Publish widget. The chat only shows on your site after that last step.

Phone Receptionist (voice). Greets callers ("Hi, thanks for calling [Your Business Name]. This is [Your Name]'s assistant."), answers basics from its Phone Facts and offers the Free Clarity Call. Phone agents can't book on the call itself, so it asks permission to text the /book link, or takes a message with times that work.

1. Replace the placeholders in the welcome message and fill in the Phone Facts block.
2. Assign a phone number to the agent (it has none after install).
3. Replace [yourdomain.com] in its instructions, call the number yourself, then turn it on.

Go-live test

Run these on your live domain with your own email and phone. Form tests on the preview page create the contact but do not start workflows, so test on the real site.

- [ ] Download the free guide. You get the guide email, and your contact shows the tag Guide Download and a Leads card at New.

- [ ] Send the Contact form choosing "I'm ready to talk about coaching" with the text box ticked. You get the auto-reply, a reply task appears, and the contact has the tags Ready to Talk and SMS Opt-In.
- [ ] Join the newsletter. You get the welcome note.
- [ ] Book a Free Clarity Call. You get the branded confirmation (and a text if opted in), the card moves to Call booked, and the guide emails stop.
- [ ] Cancel that booking. You get the rebook email and no reminder.
- [ ] Drag your test card to Deciding. You get the thank-you email.
- [ ] Add the tag New Client. You get the welcome and intake email, and a Clients card appears at Onboarding.
- [ ] Fill in the Client Intake form. The answers show on the contact record.
- [ ] Ask the chat assistant a question and call the phone number.
- [ ] Read every email on your phone once. Look for leftover [brackets].

Delete the test contact when you're done so your reports start clean.

Questions or stuck on a step?
Email hello@leadbuildlive.com and include your workspace name.

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