



Coach's CEO Toolkit

Top Technology Tools

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What technology is best to save me time?

Scale your business for growth with technology

Top Technology Tools

Leverage Automation with the top 10 tools I use to run my coaching business. As a bonus, 18 more specialized tools and my preferred vendor contacts.

Meet and serve clients:

1. **Calendly** - calendar, scheduling, reminders. I use the version with automated reminders and the ability to have multiple types of events (e.g. Consults, 1:1 Coaching, General Meetups) each with their own availability. \$144 annually.
2. **Zoom** - videoconferencing, webinars. I use the paid version for unlimited call time. This comes with a set amount of storage you can use for recordings in the cloud. \$112 annually.
3. **Typeform** - client applications, intake form, check-in form, feedback, quizzes. \$29 monthly.
4. **Evernote** - client notes, program development notes, marketing copy notes. \$70 annually.
5. **Voxer** - ongoing support and contact with clients. I use the free version, though I notice the history disappears. If clients prefer text or Facebook messenger, I am flexible to use either of those instead.

Sign and onboard clients:

1. **Stripe** - client payment. Fees will be applied to every transaction which are pretty standard rates.
2. **Jotform** - contract signature. I use the free version and notice that when adding forms on the mobile app, the number of forms seems unlimited. Jotform also allows for subscription payments to Stripe, allowing for a client to complete their payment information once and recurring future payments are automated.

Engage others and make offers:

1. **Social Media** - engage those in need of help and inspiration, build audience, garden contacts by nurturing your audience so they know, like and trust.
2. **MailChimp** - email marketing to educate and offer. I use the free version and plan to until I have 500 recipients on my mailing list. I email at least weekly and daily for select programs without a problem. Using a platform like this helps you manage subscribers and minimizes your emails going to junk filters when emailing many people at once.
3. **GoDaddy** - buy domains and create pages, with email @domain. I own two domains, each with webhosting and emails associated with the domain. \$115-120 annually for web hosting and domain. \$72 annually for email associated with the domain.

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Advanced:

Social Media Marketing

- **Teleprompter** app for scripted videos. \$90 annually.
- **Canva** for visually beautiful social media posts, business cards, flyers, infographics, pitches, free lead magnets, presentations. I use the free version though I did try out the professional version.

Web Marketing

- **Bit.ly Tinyurl** Link shortening – let's say you want to share a link of your website or a quiz and want it to be short and easy for someone to cut and paste or retype. Use these link shortener as for free.
- **Involve.me Yotpo** are all good solutions for building forms. You can get what you need for free generally.

Communication

- **Google Voice** can be used to generate a new phone number for calls and texts. I use this to keep my business calls and texts separate from my personal. It's free.
- **WhatsApp Voxel Facebook Messenger** Messaging may take you to a variety of platforms across your clients though if it is hard to handle you can prescribe that they use your preferred tool.
- **Kajabi** for hosting course content
- **Hemingway Editor** is a free site where you can copy and paste your written content in and it will rate the ease of understanding and will give you suggestions for how to edit it for higher quality, easier to read text.
- Video Editing **Final Cut Pro X** for video editing

Financials

- **PayPal Venmo Stripe** are my top payment methods. Have business accounts on each is a good idea as they are free and it will allow you to collect payment in a variety of ways if needed. I prefer Stripe.

Creativity

- **Workflowy Notion**, an online workspace organization tool

Favorite Service Providers:

- **Matthew Domenech** domenechmatthew99@gmail.com for video editing and production
- For caricature drawings as gifts for clients email **Mel** at mukatman@gmail.com.
- For swag for clients and company-branded items **BobShayeConsulting**, bob@shayebobcoaching.com