

The Essential Tech Stack to Launch Your Coaching Business



Virtually Debbie

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BUSINESS SETUP:

[Workspace: Email & Files Management](#)

[Workspace: File Backups](#)

[Workspace: File Backups](#)

[Workspace: Large File Transfers](#)

[Workspace: File Storage](#)

[Workspace: Security \(Password Management\)](#)

[Workspace: Security \(Antivirus Protection\)](#)

[Workspace: Security \(Two-Factor Authentication - 2FA\)](#)

COMMUNICATION:

[Communication: Scheduling: Client Booking](#)

[Communication: Calendar Management](#)

[Communication: Video Calls](#)

[Communication: Video Session Recording](#)

[Communication: Client Messaging and Collaboration](#)

FINANCE:

[Finance: Payment Processing](#)

[Finance: Manual Expense Tracking](#)

LEGAL:

[Legal: Client Contracts](#)

[Legal: Website Policies](#)

MARKETING:

[Website & Online Presence: Domain & Hosting](#)

[Website & Online Presence: Website Builders](#)

[Website & Online Presence: Social Media Platforms](#)

[Website & Online Presence: Link-in-Bio Pages](#)

[Website & Online Presence: Email Marketing](#)

[Website & Online Presence: Graphic Design](#)

[Website & Online Presence: Analytics](#)

SALES:

[Sales: Manual Sales Tracking](#)

[Sales: CRM \(Customer Relationship Management\)](#)

[Sales: CRM Upgrade Path](#)

BONUS TOOLS:

[Bonus: AI Tools: Content, Research, Ideas](#)

[Bonus: AI Tool Alternatives](#)

[Bonus: Automation Triggers](#)

Virtually Debbie Tech Stack Guide

As a new coach, you don't need a complicated tech stack, you need a clear starting point.

I created this guide to walk you through the tools that actually support your business, without adding stress or distractions.

For each tool, I've included what it's used for, what's free, what's worth paying for, when to use it, and a few tips I've picked up from my own setup.

The goal here is simple: help you stay focused on your clients and your work, not your software.

BUSINESS SETUP:

Workspace: Email & Files Management

Google Workspace

- **What it's for:** Using a professional email, managing client files in Google Drive.
 - **Free Plan:** Gmail address with 15GB storage.
 - **Paid Plan:** \$6/month. Includes custom domain email, 30GB storage, and admin tools.
 - **When to Use:** Early on, when you want to look more polished.
 - **Coach Tip:** Store all client forms, notes, and resources in shared folders.
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Workspace: File Backups

Time Machine (Mac)

- **What it's for:** Automatically backing up your Mac to an external hard drive.
- **Free Plan:** Included on all Mac systems.
- **Paid Plan:** None. You just need a drive (~\$60–100).
- **When to Use:** As soon as your business files are stored locally.
- **Coach Tip:** Plug it in once a week. Set it and forget it.

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Workspace: File Backups

Google Drive or OneDrive (PC or Mac)

- **What it's for:** Saving files to the cloud so they're protected and accessible.
- **Free Plan:** Google: 15GB. OneDrive: 5GB.
- **Paid Plan:** Google Workspace: \$6/month. OneDrive: \$2/month or bundled with Microsoft 365.
- **When to Use:** Now, especially if you don't use Time Machine.
- **Coach Tip:** Save a master folder with all key docs: client forms, PDFs, content drafts.

Workspace: Large File Transfers

WeTransfer

- **What it's for:** Sending large files like session recordings or welcome packets.
- **Free Plan:** Send up to 2GB. No account needed.
- **Paid Plan:** \$12/month for up to 200GB, branding, and storage.
- **When to Use:** When a file is too big for email or Drive.
- **Coach Tip:** Use it for high-res PDFs or recordings after a coaching session.

Workspace: File Storage

Google Drive / Dropbox

- **What it's for:** Backing up, organizing, and sharing documents.
- **Free Plan:** Google: 15GB. Dropbox: 2GB.
- **Paid Plan:** Google: \$6/month. Dropbox: \$9.99/month.
- **When to Use:** Immediately—even a few PDFs or client notes add up fast.
- **Coach Tip:** Create one folder per client. Keep it clean.

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Workspace: Security (Password Management)

1Password or Bitwarden

- **What it's for:** Keeping all your logins safe and organized.
 - **Free Plan:** Bitwarden offers free plans.
 - **Paid Plan:** 1Password: \$36/year. Bitwarden Premium: \$10/year.
 - **When to Use:** Immediately—don't reuse passwords.
 - **Coach Tip:** Store Stripe, Gmail, Zoom, Slack, and Drive logins first.
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Workspace: Security (Antivirus Protection)

Malwarebytes or Avast

- **What it's for:** Protecting your device from viruses and malware.
 - **Free Plan:** Manual scanning only.
 - **Paid Plan:** Malwarebytes: \$59/year. Avast starts at \$50/year.
 - **When to Use:** If you're using your personal device for coaching.
 - **Coach Tip:** Schedule automatic scans monthly, update software regularly.
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Workspace: Security (Two-Factor Authentication - 2FA)

Google Authenticator or Authy

- **What it's for:** Adding extra security to important logins.
- **Free Plan:** Built into most apps like Gmail, Stripe, and Zoom.
- **Paid Plan:** None required.
- **When to Use:** Immediately.
- **Coach Tip:** Use an authenticator app (not SMS) for stronger protection.

COMMUNICATION:

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Communication: Scheduling: Client Booking

Calendly

- **What it's for:** Letting clients schedule sessions without back-and-forth.
 - **Free Plan:** One event type, basic availability, Stripe integration.
 - **Paid Plan:** \$10–15/month. Includes reminders, custom links, and multiple events.
 - **When to Use:** Immediately—even the free version works well.
 - **Coach Tip:** Add buffer time before and after sessions to protect your focus.
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Communication: Calendar Management

Google Calendar

- **What it's for:** Managing your availability and coaching blocks.
 - **Free Plan:** Included with any Gmail account.
 - **Paid Plan:** Included with Google Workspace (\$6/month).
 - **When to Use:** Use it from the beginning.
 - **Coach Tip:** Create recurring blocks for admin, content, client calls, and rest.
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Communication: Video Calls

Zoom

- **What it's for:** Running 1:1 and group coaching sessions virtually.
- **Free Plan:** Unlimited 1:1 calls, 40-minute group limit.
- **Paid Plan:** \$15/month. Removes group limit and allows cloud recording.
- **When to Use:** From day one.
- **Coach Tip:** Use your personal Zoom link or let Calendly generate unique ones.

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Communication: Video Session Recording

Fathom

- **What it's for:** Recording Zoom calls with notes, summaries, and follow-ups.
 - **Free Plan:** Unlimited recordings and transcripts.
 - **Paid Plan:** Currently free (subject to change).
 - **When to Use:** Use during coaching calls to send clients a summary afterward.
 - **Coach Tip:** Always ask for permission before recording.
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Communication: Client Messaging and Collaboration

Slack

- **What it's for:** Chatting and file sharing for coaching support between sessions.
 - **Free Plan:** 90-day message history, 1:1 DMs, 10 integrations.
 - **Paid Plan:** \$8.75/month per user. Unlimited history, huddles, shared channels.
 - **When to Use:** When you offer weekly or package-based coaching.
 - **Coach Tip:** One private channel per client, create clear support boundaries.
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FINANCE:

Finance: Payment Processing

Stripe

- **What it's for:** Accepting credit or debit card payments online.
 - **Free Plan:** No monthly fee. You only pay per transaction (2.9% + 30¢).
 - **Paid Plan:** None. Stripe is pay-as-you-go.
 - **When to Use:** From day one, if you're collecting money for sessions or packages.
 - **Coach Tip:** Connect Stripe to Calendly to get paid automatically when clients book.
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Finance: Manual Expense Tracking

Google Sheets

- **What it's for:** Keeping a basic log of income and expenses.
 - **Free Plan:** Unlimited spreadsheets with a free Google account.
 - **Paid Plan:** Included in Google Workspace (\$6/month) if you upgrade.
 - **When to Use:** Perfect while you're just starting and don't need full accounting software.
 - **Coach Tip:** One tab for income, one for expenses, one for notes—don't overthink it.
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LEGAL:

Legal: Client Contracts

HelloSign (Dropbox Sign)

- **What it's for:** Sending contracts to clients and collecting legal signatures.
 - **Free Plan:** Send up to 3 documents per month.
 - **Paid Plan:** \$15/month for unlimited docs and templates.
 - **When to Use:** As soon as you sign your first paying client.
 - **Coach Tip:** Keep a single contract template you duplicate and update per client.
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Legal: Website Policies

Privacy Policy & Terms

- **What it's for:** Telling visitors how you handle their data and what they agree to on your site.
 - **Free Plan:** You can write your own or use a free template.
 - **Paid Plan:** \$99–\$299 for lawyer-drafted templates (e.g., Coaches & Co, The Contract Shop).
 - **When to Use:** Before collecting emails or using a contact form.
 - **Coach Tip:** Put the links in your footer. Quiet but required.
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MARKETING:

Website & Online Presence: Domain & Hosting

GoDaddy, Namecheap, or Google Domains

- **What it's for:** Buying your .com and hosting your site or redirect.
 - **Free Plan:** None.
 - **Paid Plan:** Domains: ~\$12/year. Basic hosting: \$5–15/month.
 - **When to Use:** Early—secure your name even if you're not ready to build a full site.
 - **Coach Tip:** Use your domain for your email and your LinkTree-style page.
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Website & Online Presence: Website Builders

Squarespace, Wix, or Carrd

- **What it's for:** Creating a professional site without coding.
 - **Free Plan:** Limited, often includes ads and branded URL.
 - **Paid Plan:** Squarespace: \$16/month. Wix: \$14/month. Carrd: \$19/year.
 - **When to Use:** When you're ready to showcase your work, bio, and offers.
 - **Coach Tip:** Start with a one-page layout. Add more later.
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Website & Online Presence: Social Media Platforms

Instagram, Facebook, LinkedIn, TikTok, etc.

- **What it's for:** Building visibility, connecting with your audience, sharing your story and offers.
- **Free Plan:** Fully functional platform with free business tools.
- **Paid Plan:** Optional ad spend. Meta Boosts start at \$1/day.
- **When to Use:** Start right away, even if you only post weekly.

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- **Coach Tip:** Use a clear bio, consistent visuals, and one call-to-action (like your booking link). Pin your top posts. Stories and Reels often outperform static posts for reach.

Website & Online Presence: Link-in-Bio Pages

Linktree or Milkshake

- **What it's for:** A simple mobile-friendly page to link to your services, freebie, or website.
- **Free Plan:** Includes basic links, colors, and analytics.
- **Paid Plan:** \$5–9/month for branding and advanced features.
- **When to Use:** As soon as you start posting on Instagram or TikTok.
- **Coach Tip:** Include links to book a session, join your email list, and learn about your work.

Website & Online Presence: Email Marketing

MailerLite

- **What it's for:** Sending newsletters, freebies, and building a client list.
- **Free Plan:** Up to 1,000 subscribers and 12,000 monthly emails.
- **Paid Plan:** \$10–15/month for automations and templates.
- **When to Use:** Once you have something to say or give away.
- **Coach Tip:** One welcome email is enough to start. Build slowly.

Website & Online Presence: Graphic Design

Canva

- **What it's for:** Creating content for Instagram, lead magnets, carousels, etc.
- **Free Plan:** Thousands of templates and design tools.

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- **Paid Plan:** \$13/month for pro features like resizing, branding, and premium elements.
 - **When to Use:** Right away, even if you're only posting once a week.
 - **Coach Tip:** Save templates so your posts feel consistent and fast to make.
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Website & Online Presence: Analytics

Instagram Insights / YouTube Studio / Google Analytics

- **What it's for:** Seeing how your content performs and who it's reaching.
 - **Free Plan:** All are free with your accounts.
 - **Paid Plan:** None needed for basic use.
 - **When to Use:** Check once a week—not obsessively.
 - **Coach Tip:** Track which posts bring in followers, DMs, or email sign-ups—not just likes.
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SALES:

Sales: Manual Sales Tracking

Google Sheets

- **What it's for:** Tracking leads, discovery calls, follow-ups, and conversions.
 - **Free Plan:** Unlimited spreadsheets.
 - **Paid Plan:** Included in Google Workspace (\$6/month).
 - **When to Use:** From the beginning, before investing in a CRM.
 - **Coach Tip:** Set up simple columns: name, date, source, status, notes.
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Sales: CRM (Customer Relationship Management)

Streak (for Gmail)

- **What it's for:** Lightweight CRM built into Gmail.
 - **Free Plan:** Basic pipelines, reminders, mail merge.
 - **Paid Plan:** \$15/month for more features.
 - **When to Use:** If you're sending a lot of outreach emails or managing leads in Gmail.
 - **Coach Tip:** Use it to track discovery calls and client check-ins.
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Sales: CRM Upgrade Path

Airtable or Notion

- **What it's for:** Visual dashboards and more complex tracking.
- **Free Plan:** Includes basic databases, templates, and automations.
- **Paid Plan:** Airtable: \$10–20/month. Notion: \$8/month.
- **When to Use:** Once Google Sheets feels limiting and you want better visibility.
- **Coach Tip:** Start with a template. Don't build from scratch.

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BONUS TOOLS:

Bonus: AI Tools: Content, Research, Ideas

ChatGPT

- **What it's for:** Brainstorming content, writing drafts, organizing ideas, pricing research.
 - **Free Plan:** ChatGPT-3.5 with basic tools.
 - **Paid Plan:** \$20/month for GPT-4 and more features.
 - **When to Use:** Use it anytime you feel stuck or want help generating ideas.
 - **Coach Tip:** Ask it to act like your business coach or writing partner to get better results.
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Bonus: AI Tool Alternatives

Claude / Perplexity / Gemini

- **What it's for:** Similar to ChatGPT—writing support, business brainstorming, and research.
 - **Free Plan:** All offer solid free access.
 - **Paid Plan:** Varies, generally \$20/month for advanced models.
 - **When to Use:** Helpful if you want second opinions or different AI strengths.
 - **Coach Tip:** Try each tool and save your favorite prompts to reuse later.
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Bonus: Automation Triggers

Zapier or Make.com

- **What it's for:** Connecting apps so tasks happen automatically (e.g., Calendly → Slack → Google Sheets).
- **Free Plan:** 100 tasks/month, basic zaps.
- **Paid Plan:** \$20–30/month for multi-step workflows.
- **When to Use:** Only when your manual systems feel repetitive.
- **Coach Tip:** Start by automating calendar bookings or client follow-ups.