

# Coaching CRM Setup Checklist (2026)

2026  
Edition

**Simple Coaching Dashboard System  
for Managing Clients and Bookings**

Designed for:

- Business coaches
- Life coaches
- Career coaches
- Consultants
- Online coaches



# Why Coaches Need a CRM System

Most coaches start with simple tools:

Email

Calendars

Notes

Spreadsheets

Website forms

This works at the beginning.

As enquiries grow, it gets harder to keep track.

New leads

Discovery calls

Active clients

Follow-ups

A coaching CRM system keeps everything organised inside one dashboard.

Instead of switching between tools, you can see your whole coaching business in one place.



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# The Basic Coaching Dashboard Setup

A simple coaching dashboard includes:

Lead Enquiries

People who contact you through:

Website forms

Landing pages

Booking links

All enquiries should be stored in one system.

Discovery Call Booking

Your system should include:

Online booking

Automatic confirmations

Reminders

This reduces missed calls.

Client Records

Each client should include:

Contact details

Notes

Session history

This avoids searching through emails.



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# Simple Coaching Client Pipeline

Most coaching businesses follow a simple process.

Example pipeline:

New Enquiry

Discovery Call Booked

Follow-Up Needed

Client Active

Completed Programme

A coaching CRM dashboard, lets you see where every client is in this process.

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## Start with simple automations.

Discovery Call Confirmations →

After a booking: →

Send a confirmation automatically.

## Send reminders

24 hours before →

1 hour before →

This reduces no-shows.

## Follow-Up Messages

After calls →

Send follow-up automatically. →

"Thanks for the call today. Let me know if you'd like to continue."

# Common Coaching Tool Setup

Many coaches use separate tools like:

Website builder

Booking software

Email

Notes

Spreadsheets

This works but becomes harder to manage over time. Information gets scattered across different places. A coaching CRM dashboard keeps everything together.



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# Coaching CRM Setup Checklist

Use this checklist when setting up your system.

- Create a coaching enquiry form
- Set up discovery call booking
- Store leads in one place
- Create a simple pipeline
- Add client records
- Store coaching notes
- Set up reminders
- Add follow-up messages
- Test your booking system
- Test reminder messages



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If you want to run your coaching business from one dashboard, a coaching CRM system makes everything easier to manage.

Many coaches use one platform to handle:

Leads

Bookings

Clients

Automation

**Start building your coaching CRM system**

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