

Let's Customize Your Coaching Site

Congratulations on building your coaching career! The SimplySchedule.me team is excited to help you grow with a professional, easy-to-use website and scheduling tool.

The website template you've been given is pre-filled with coaching-specific content and will provide you with ideas for what to include. Read through the pages and adjust the wording to reflect you, your services, and the resources you provide.

To help you out, here is a checklist of the personalizations you'll want to make to set up the scheduling tool and make the website your own.

General WordPress Site Customizations

- ☐ Site name (default is Coaching)
 - ☐ Dashboard → Appearance → Customize → Site Identity → Site Title and Logo Control → Site Title
- ☐ Site tagline (default is Take your life to the next level)
 - ☐ Dashboard → Appearance → Customize → Site Identity → Site Title and Logo Control → Tagline
- ☐ Header Logo
 - ☐ Dashboard → Appearance → Customize → Site Identity → Site Title and Logo Control → Logo
- ☐ Footer Logo
 - ☐ Dashboard → Appearance → Customize → Footer → Widget 1
- ☐ Site Icon
 - ☐ Dashboard → Appearance → Customize → Site Identity → Site Icon
- ☐ Social links in header
 - ☐ Dashboard → Appearance → Customize → Header → Social
 - ☐ Choose which links you want to include
 - ☐ Reorder the links as desired
 - ☐ Click "Set social links" to update the URLs for each link
- ☐ Social links in footer
 - ☐ Dashboard → Appearance → Customize → Footer → Social
 - ☐ Chose which links you want to include
 - ☐ Reorder the links as desired
 - ☐ If you already set these links when doing the above header step, you don't need to re-set the link values for the footer
- ☐ Copyright in footer (by default it will include the year and your site title)
 - ☐ Dashboard → Appearance → Customize → Footer → Footer Copyright HTML

Google Analytics - Site Kit

- ☐ From your WordPress Dashboard, click “Site Kit” in the left vertical navigation bar
- ☐ Check the box that says, “Connect Google Analytics as part of your setup.”
- ☐ This will redirect you to Sign in with Google
 - ☐ Choose the Google account that you’d like to set up Google Analytics with
 - ☐ Next, Google will ask you to select the permissions you want to grant, “Select what Site Kit can access” → Use the “Select All” checkbox
- ☐ On the Site Kit setup screen:
 - ☐ For “Have Google verify site ownership” → click “Verify”
 - ☐ For “Turn on metrics in your dashboard” → click “Allow”
 - ☐ For “Set up Search Console” → click “Set up”
 - ☐ For “Set up Google Analytics” → click “Next”
- ☐ You’ll be redirected back to the Site Kit plugin screen to “Connect Service”
 - ☐ Use the account dropdown → select “Set up new account”
 - ☐ In the “Create your Analytics account” page → click “Create Account”
 - ☐ Choose the Google account that you’d like to set up Google Analytics with → click Continue on each screen
- ☐ On the “Google Analytics Terms of Service Agreement”
 - ☐ Click the checkbox, “I also accept the Data Processing Terms as required by GDPR. Learn more”
 - ☐ Click the checkbox “I accept the Measurement Controller-Controller Data Protection Terms for the data that I share with Google.”
 - ☐ Click “I Accept” → click “Go Back to Dashboard”

To visit your new Google Analytics account, use this URL: <https://analytics.google.com/>

To visit your new Google Search Console account, use this URL:

<https://search.google.com/search-console>

Appointments Plugin

- ☐ From your WordPress dashboard, click “Appointments” in the left vertical navigation bar
- ☐ Go into Settings tab
 - ☐ General Settings
 - ☐ Confirm/update the timezone you’re located in
 - ☐ Confirm your date and time format
 - ☐ Choose the day you want your week to start on
 - ☐ Enter your name for “Appointment Contact”
 - ☐ Enter your business name for “Business Name”

- ☐ Enter your email for “Default Admin Email”
- ☐ Google
 - ☐ Connect the Google account you want to be integrated with your appointment scheduler to sync bookings and check for conflicts.
 - ☐ [Google set-up guide](#)
- ☐ Payments
 - ☐ Add your Stripe and/or PayPal account information so students/mentees/clients can pay when booking paid appointment types
 - ☐ [Stripe set-up guide](#)
 - ☐ [PayPal set-up guide](#)
- ☐ Go into Appointment Types
 - ☐ For each appointment type, check and customize:
 - ☐ Basics
 - ☐ Confirm appointment durations
 - ☐ Availability
 - ☐ Set your usual availability hours
 - ☐ Capacity
 - ☐ Select the number of people who can book this type of appointment at the same time (you can allow multiple simultaneous bookings for group events)
 - ☐ Scheduling Options
 - ☐ Make sure the appointment timezone is locked to the location timezone for in-person appointments
 - ☐ Make sure the appointment timezone is localized for virtual appointments so the person booking the call will see availability in their timezone
 - ☐ Confirm appointment buffer length before/after
 - ☐ Confirm how much advance booking notice you want
 - ☐ Confirm how far in advance appointments can be booked
- ☐ Set up Payments and enter the amount to charge for that particular appointment type
- ☐ Web Meetings
 - ☐ Enter your Zoom, Google Meet, or other web meeting URL you’d like to use for this appointment
- ☐ Google Calendar
 - ☐ Sync the Google calendar you want these appointments to display on
 - ☐ Your synced Google calendar will also be used to check for schedule conflicts (Appointments will be bookable during the general availability hours you set. Within those hours, if your Google calendar shows that you’re unavailable, that time slot will

be excluded from the list of available appointment times shown to your notary clients when they're scheduling appointments)

- ☐ Customer Information
 - ☐ Check the default list of mandatory and optional questions the client will be asked to answer during booking. Add to/edit the list.
- ☐ Add more appointment types if needed.
 - ☐ Start from scratch by clicking "Add new" or clone an existing similar appointment type by clicking the gear icon by that appointment type and selecting "clone"
 - ☐ Update the name, instructions, payments, and customer information sections
 - ☐ Save

Website Homepage

"Hero" Section at the top of the page

- ☐ Replace "Master your mindset" and "Change your life" with whatever call-to-actions you'd like.
- ☐ If you have an email list you'd like site visitors to join:
 - ☐ Update the copy below "Change Your Life"
 - ☐ Click the Email Address form field
 - ☐ In the Form settings menu on the right of your screen:
 - ☐ Add fields to the form if you'd like
 - ☐ Fill out the "Actions After Submit" section
 - ☐ Fill out the "Email Settings" section
 - ☐ In "Message Settings," you can customize the wording and colors of the success message that displays on screen after a successful form submission
- ☐ If you don't have an email list and don't want to collect emails:
 - ☐ Click on the Email address field while in edit mode
 - ☐ Select the vertical 3-dot menu
 - ☐ Click "delete" to remove the form.
- ☐ Update the "I'm Ready" button text to whatever call-to-action you want if you're keeping the email list form. If you removed the form, remove the button as well.
- ☐ Replace the stock photo with your photo

Services Section

We suggest using this section to highlight the different types of services you provide.

- ☐ Update the title of the section as you like
- ☐ If you need to add or delete columns:

- ☐ Click into the section containing the three columns.
- ☐ Use the layout settings to adjust your number and configuration of columns

- ☐ Update the titles in each of your sub-sections
- ☐ Update the body text of each of your sub-sections
- ☐ Add buttons to each of your sub-sections if you'd like to link to another page/site

About Me Section

- ☐ Adjust the headers and text by each of the stars
- ☐ Update the text in the about me section to reflect you and your background
- ☐ Update the "Learn More" button link to direct to either your "About" page on this site or anywhere else you prefer

Featured Speaker Section

This section can be used to share highlights of your appearances or can be modified to showcase more details about one of your primary products/services.

- ☐ Update the section title
- ☐ Update the section text
- ☐ Update the button text
- ☐ Update the button link

Testimonials Section

Use this section to showcase public ratings from students/mentees/peers/publications if you already have some you'd like to share. Otherwise, you can delete this section.

- ☐ Update the Headers and body text
- ☐ Update the rating category names
- ☐ Update the rating category scale values
- ☐ Update the button text
- ☐ Update the button link

Resources Section

Use this section to showcase links to some of your blog posts, published books, videos, etc.

- ☐ Update the image for each of the sub-sections
- ☐ Update the Headers and body text for each sub-section
- ☐ If you keep the blog post date layout for the last two sub-sections, update the dates
- ☐ Update the button text for each sub-section
- ☐ Update the button links for each sub-section

Yoast SEO Tool Section (below the page editor)

- ☐ Update the meta description for the page (this is the preview text that will be displayed in a search engine results page)

Website About Page

Top Section

- ☐ Replace the headers and body text on the entire page with some details you'd like to share about yourself.
- ☐ Replace the stock photo with a photo of you.
- ☐ Replace the default logo with your logo
- ☐ Update the button text
- ☐ Update the button link

Middle Section

- ☐ Update the header text and body text
- ☐ [Optional] Replace the background stock image with a background image of you, or another stock photo from a royalty-free image site that fits with the theme of your site
- ☐ Update the image overlay color to match your branding and colors

Bottom Section

- ☐ Update the number in the counter (if you don't have more than 1k students/clients yet, just remove the "k" in the "Number suffix" setting)
- ☐ Update the headers and body text
- ☐ [Optional] Replace the stock photo with an image of you, or another stock photo from a royalty-free image site that fits with the theme of your site

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Website Services Page

Main Section

- ☐ Update the header and subhead text for the page
- ☐ Update the names of your services
- ☐ Update the body text for each service
- ☐ Replace the stock photos with yours
- ☐ Update the links on the photos
- ☐ Update the button text for each service
- ☐ Update the button link for each service

Bottom Section

- ☐ Update the Click the Email Address form field
 - ☐ In the Form settings menu on the right of your screen:
 - ☐ Add fields to the form if you'd like
 - ☐ Fill out the "Actions After Submit" section
 - ☐ Fill out the "Email Settings" section
 - ☐ In "Message Settings," you can customize the wording and colors of the success message that displays on screen after a successful form submission
- ☐ If you don't have an email list and don't want to collect emails:
 - ☐ Click on the Email address field while in edit mode
 - ☐ Select the vertical 3-dot menu
 - ☐ Click "delete" to remove the form.
- ☐ Update the "I'm Ready" button text to whatever call-to-action you want if you're keeping the email list form. If you removed the form, remove the button as well.
- ☐ [Optional] Replace the background stock image with a background image of you, or another stock photo from a royalty-free image site that fits with the theme of your site
- ☐ Update the image overlay color to match your branding and colors

Yoast SEO Tool Section (below the page editor)

- ☐ Update the meta description for the page (this is the preview text that will be displayed in a search engine results page)

Website Resources Page

Main Section of Page

- ☐ Update the headers on this page
- ☐ Update the body text on this page
- ☐ Replace the stock photos with yours
- ☐ Choose which of your resources you want to link to, then edit:
 - ☐ Resource names
 - ☐ Resource descriptions
 - ☐ Button text
 - ☐ Button links
 - ☐ Resource images
- ☐ Edit the email contact form section following the same instructions as you used on the Services page

Yoast SEO Tool Section (below the page editor)

- ☐ Update the meta description for the page (this is the preview text that will be displayed in a search engine results page)

Website Contact Page

- ☐ Edit the subheader text
- ☐ Edit the social media account section
 - ☐ Choose which platforms to include
 - ☐ Replace the default social handles with yours
 - ☐ Update the subscriber counts (remember to add or remove the “k” suffix as needed)
- ☐ Update the “Service Inquiries” section with your information or delete this section if you prefer not to list your email address on the site
- ☐ Update the header, subheader, and body text of the “Have A Question?” section.
- ☐ Update the contact form as needed

Yoast SEO Tool Section (below the page editor)

- ☐ Update the meta description for the page (this is the preview text that will be displayed in a search engine results page)

Work With Me Page

Appointments Section

- ☐ Update the header text & subhead text
- ☐ Click into the “Appointment Booking Form” section to customize the appointment types, views, and styles
 - ☐ **Types:** Check any of the appointment types in your Appointments plugin that you would like to display on your “Work With Me” page
 - ☐ **View:** Try the three different view options and choose which you like best
 - ☐ **Booking Flow:** Experiment with the different options and choose your favorite
 - ☐ **Colors:** If you like, you can also add a bit of color pop to the page by setting custom background and accent colors

Quote Section

- ☐ Replace the filler text quote with one of your own, or a famous quote you admire
- ☐ Replace the background image with one of your own by clicking into the last Row Layout > Style > Background Image > Edit Image

Yoast SEO Tool Section (below the page editor)

- ☐ Update the meta description for the page (this is the preview text that will be displayed in a search engine results page)

Note: Please carefully read all the existing website template wording and update it as needed. SimplySchedule.me is not responsible for your published site's thoroughness and accuracy.