TOOLS LIST

25 TOOLS TO AUTOMATE YOUR COACHING INSTITUTE DIGITALLY

PREPARED BY:
LEGACYEDTECH

CHECKLIST FOR TOOLS

25 TOOLS TO AUTOMATE YOUR COACHING INSTITUTE DIGITALLY

NO TECH SKILLS REQUIRED. JUST PLUG-AND-PLAY YOUR WAY TO FREEDOM.

Are you still doing everything manually in your coaching business? From scheduling sessions to sending reminders, collecting payments, and sharing resources—it adds up fast.

The good news is, Automation can save you 10+ hours a week, make your operations look polished, and keep your students happy.

This checklist gives you 25 essential tools, broken down by category, that successful coaches use to run their institutes on autopilot.

SCHEDULING TOOLS

Automate your bookings, avoid no-shows, and eliminate back-and-forth emails.

- Google Calendar – Great for managing current clients and sending automated session reminders.

- Calendly – Best for beginners. Smart timezone detection, buffer times, and seamless integrations with onboarding workflows.

- Acuity Scheduling – Ideal for growing coaches. Offers advanced customization, intake forms, and syncs with calendars.

ONBOARDING & CONTRACT TOOLS

Make your onboarding smooth and legally secure with zero manual work.

- Dropbox Sign / DocuSign / PandaDoc – All three allow you to automate contract delivery, collect e-signatures, and trigger next steps (like welcome emails or onboarding forms).

PAYMENT PROCESSING TOOLS

Collect payments on time, automate invoicing, and never chase clients again.

- Stripe – Preferred by pros. Automates recurring payments, invoicing, and failed payment recovery.

- PayPal – Trusted by beginners. Easy invoicing and secure payment gateway.

- QuickBooks & FreshBooks – Great for financial tracking and invoice automation.

FORM BUILDERS

Collect detailed info, feedback, and testimonials—on autopilot.

- Google Forms – Great for onboarding surveys and pre-session intake.

- Typeform – More interactive and beautiful. Use for testimonials or quizzes.

EMAIL MARKETING & LEAD GEN TOOLS

NURTURE LEADS, BUILD TRUST, AND AUTOMATE YOUR COMMUNICATION FUNNEL.

- ActiveCampaign – Powerful automation and personalization for onboarding and follow-ups.

- ConvertKit – Perfect for creators. Behavior-based email triggers and tags.

- Mailchimp – Easy starter platform with automation options.

- OptinMonster – Add pop-ups and forms that deliver lead magnets instantly.

CONTENT CREATION & DISTRIBUTION TOOLS

PLAN, CREATE, AND DISTRIBUTE YOUR CONTENT ACROSS CHANNELS EFFORTLESSLY.

- Notion – This is for content calendars, idea banks, and coaching roadmap creation.

- Google Sheets – Quick setup for basic content planning.

- Buffer / Hootsuite – Schedule posts and track performance.

FILE SHARING TOOLS

DELIVER RESOURCES AND DOCUMENTS SECURELY AND NEATLY.

- Google Drive – Create organized client folders and share resources easily.

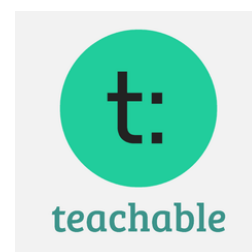- Dropbox – Great alternative for larger files or cross-device sync.

COURSE HOSTING PLATFORMS

TURN YOUR COACHING CONTENT INTO STRUCTURED, SELLABLE COURSES.

- Teachable / Thinkific / Kajabi – All three help you host video modules, track progress, and upsell courses.

- Kajabi even includes landing page builders and email marketing features—perfect for all-in-one use.

READY TO TURN THIS CHECKLIST INTO A WORKING COACHING ENGINE?

Let's not stop at reading tools. Let's build your automation ecosystem today.

Book Free Strategy Call – We'll map your tools based on your coaching workflow.

Message Me Directly on WhatsApp – Ask anything, no strings attached.