Virtual Coach

TECHTOOL TRAININGS™

SESSION TWELVE

Online Tools

For Your Coaching Business

Virtual Coach

What do you need to run your coaching business...and what could help you add value in new ways?

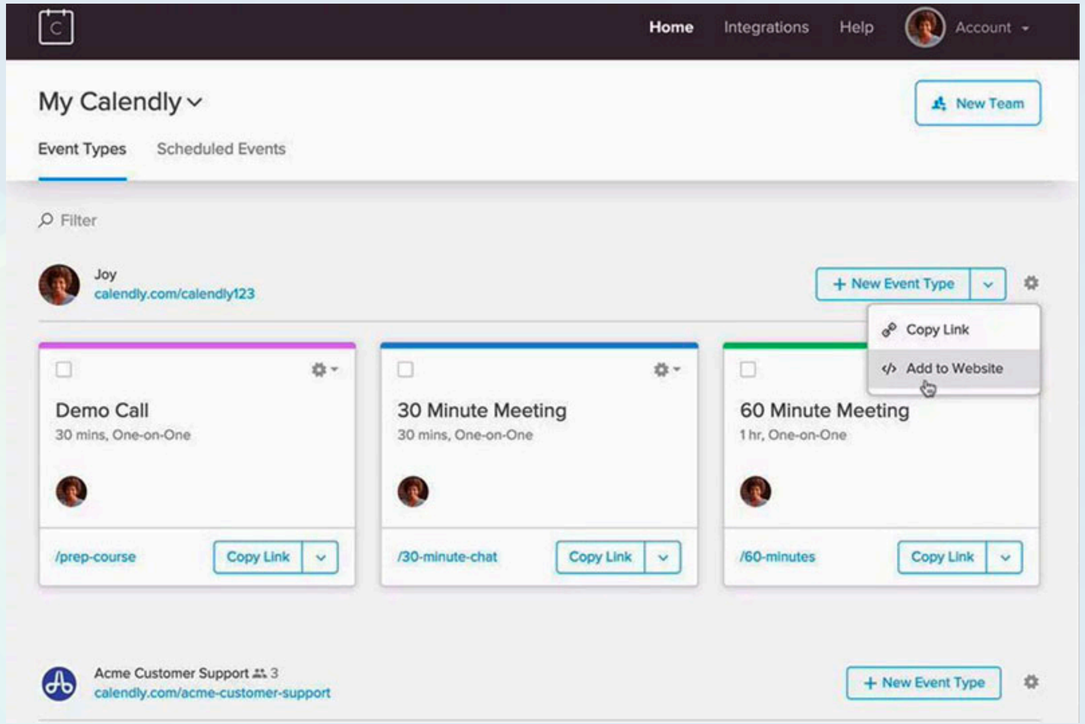
Appointment Schedulers

As a coach that works and sells online, you will chat with new contacts and prospects from a wide range of locations, schedules and time zones. Agreeing on mutual free slots can take a loooong time. Save yourself the trouble and get an online appointment calendar. Once you've set-up your website, if you want people to book discovery calls with you, an appointment scheduler will make this easy to integrate with your website.

Appointment Schedulers

Calendly

- Allows flexible scheduling between individuals or group members – good for one on one meetings, as well as for group meetings
- Offers integration with Google Calendar, Outlook 365, or just about any other calendar software that you might already have
- Easy customization of meeting times, meeting lengths and daily limits
- No need to worry about timezones, as they are automatically handled
- It is compatible with most devices



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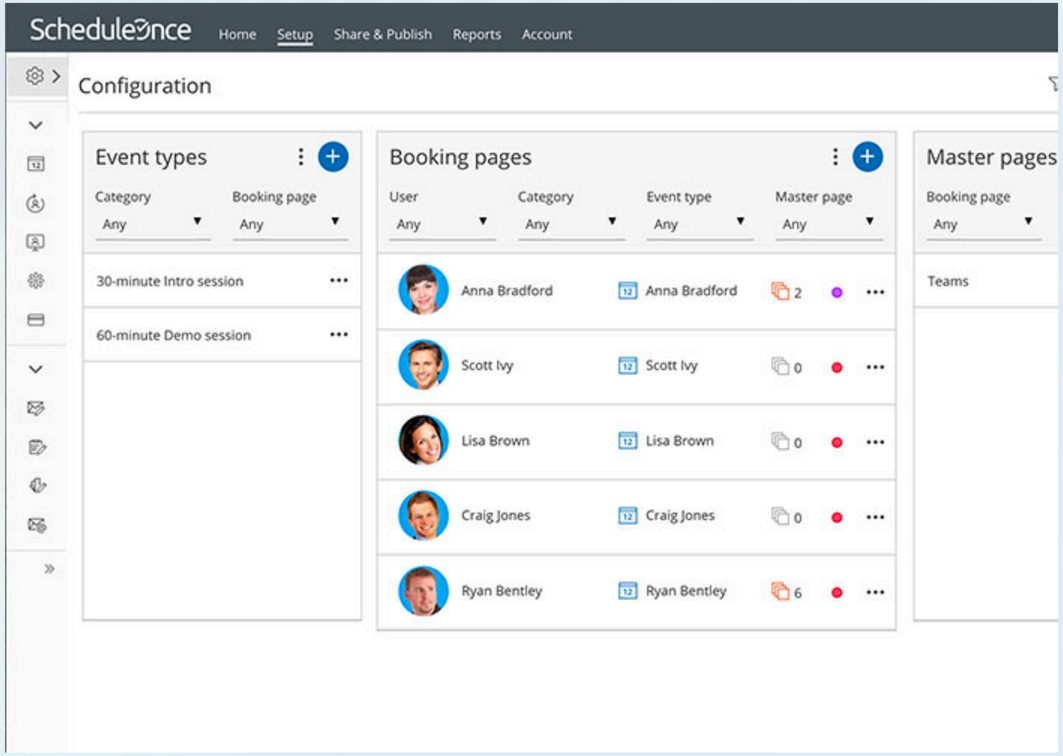
Appointment Schedulers

ScheduleOnce

- More orientated towards larger teams with different schedules
- Perfect if you have to coordinate very complex teams with different schedules, or basically any event where coordination is not easy
- Can organize packages of events, or series of appointments, for example, if you offer a four-day long class
- Offers integrations that can boost your business, such as Mailchimp, Salesforce, and Infusionsoft



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Appointment Schedulers

- Schedulicity
- InviteOnce
- TimeTrade
- Chili Piper

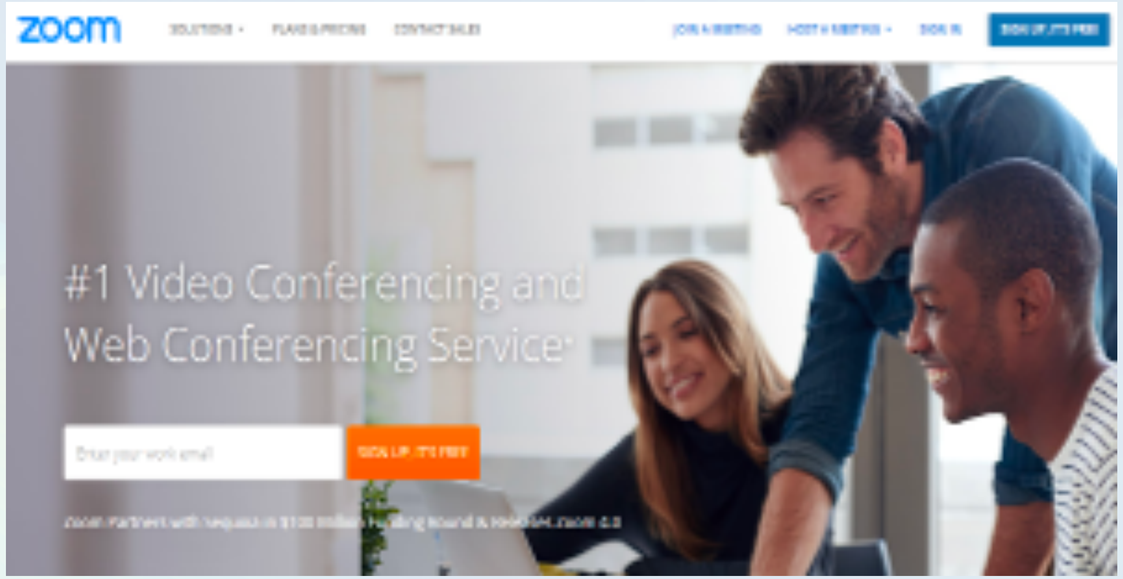
Web Conferencing

You can use Web conferencing software to participate in video and audio meetings using the internet. As a virtual coach, this may be one of the tools you use most often! This allows you to connect and coach clients from around the world, as effectively as you could if they came into your office. There are a variety of options for software with different features.

Web Conferencing

Zoom

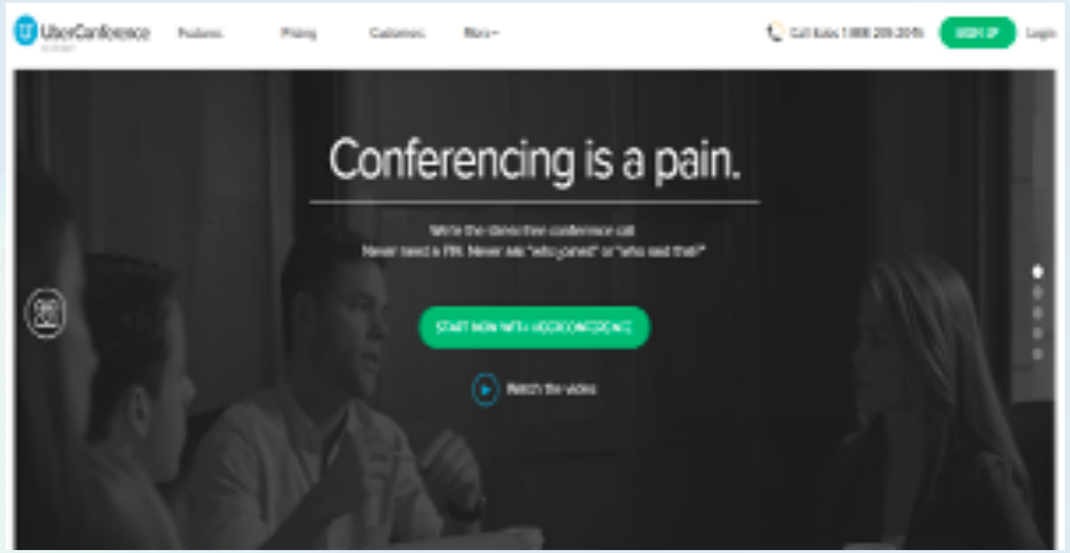
- Designed for hosting webinars, teaching online courses, conducting online training, virtual meetings and video conferences
- Online meetings that can cater to up to 100 interactive video participants and 10,000 view-only attendees
- Users can invite other participants to join the web meeting with a URL link that can be copied and posted to social media platforms and instant messengers
- Has a Basic Plan which is free (limited meeting duration)



Web Conferencing

UberConference

- A conference calling tool, and not a video conference tool
- Has a free plan for up to 10 participants with unlimited conferences
- Has a mobile app
- Has high-quality audio
- Integrates with social media, Google Drive, and other apps
- You can mute the person speaking and eject them from the conference
- Can record the conference and archive it for later



Web Conferencing

Join.me

- No need to download a software or sign up for an account
- Users simply have to click the “start” button to initiate a meeting; or click the “join” button to enter one
- Free edition that allows up to 10 participants and includes VoiP capabilities. For those that require more, paid version offers unlimited phone dial-in to 40 countries and many other features; allows up to 250 participants to join a meeting

Web Conferencing

Skype

- Offers video chat, international calls, and texting via the web with the Skype app (for mobile or desktop), instant messaging, group video conferencing, video chat, group chat, collaboration functionalities such as document and image sharing
- Contacting actual landlines and mobile phones nationally and internationally is also offered for very low rates

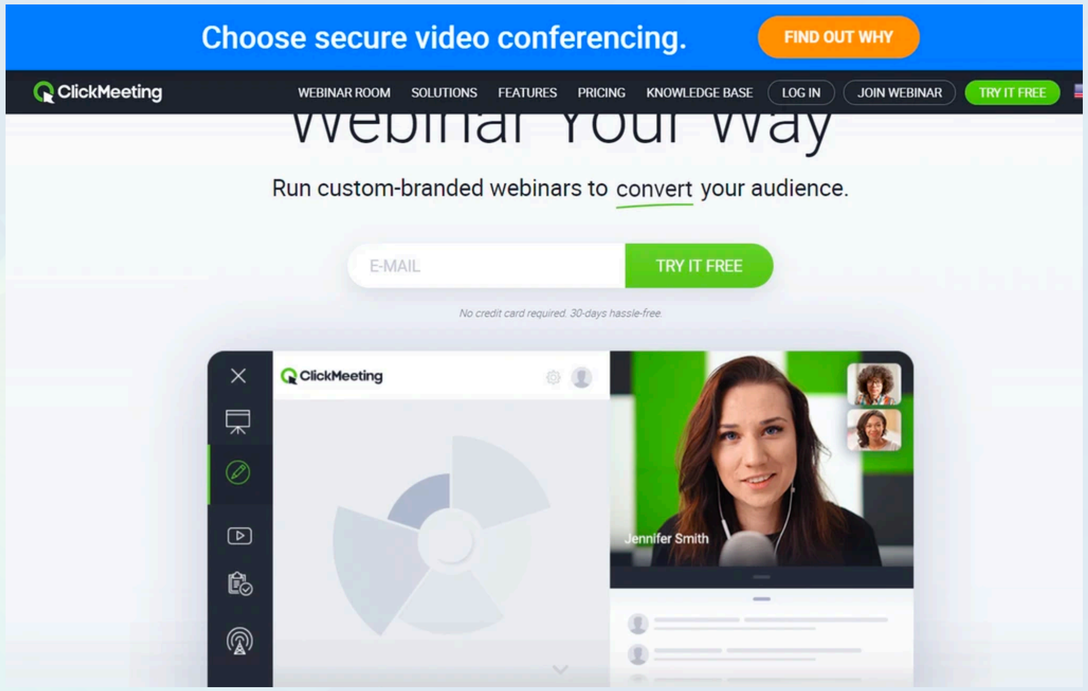
Webinars

Maybe you run a small business and only want to host your webinars for 20 people, or maybe it's time to get the most powerful program so you can expand to 4,000 participants. Webinar software helps you lead a class and prepare and invite guests, interact with the audience during the webinars, show presentations or live video, and analyze everything along the way.

Webinar Software

ClickMeeting

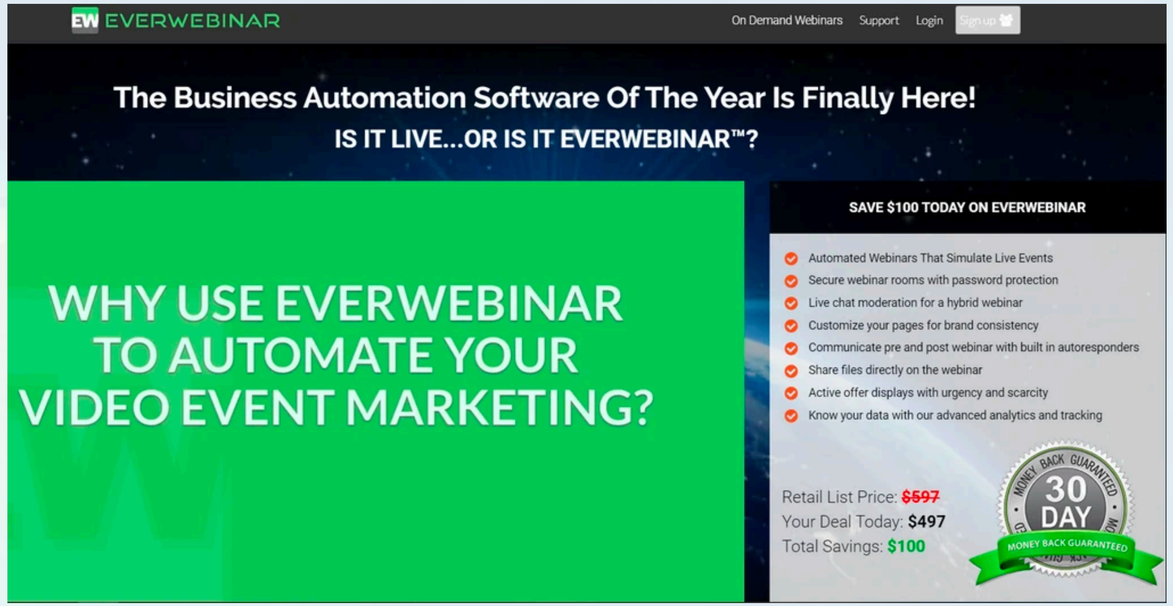
- Pricing is very flexible; lowest price point starts at $22.50/month for 25 participants
- One of the best webinar software for handling large groups of participants
- Some of the numerous webinar modes include live streams to YouTube, whiteboards, and chatting
- Webinar templates are far more basic than some



Webinar Software

EverWebinar

- EverWebinar integrates with tools for building your email list, tracking, and creating autoresponders
- The tracking is rather advanced, with things like purchase ratios, webinar behavior tracking, and an option to see exactly how much money you have made
- Email and SMS reminders are included
- EverWebinar strives to automate everything for you. However, the lack of customization tools might turn some off, along with no free trial and the onetime fee of $597.



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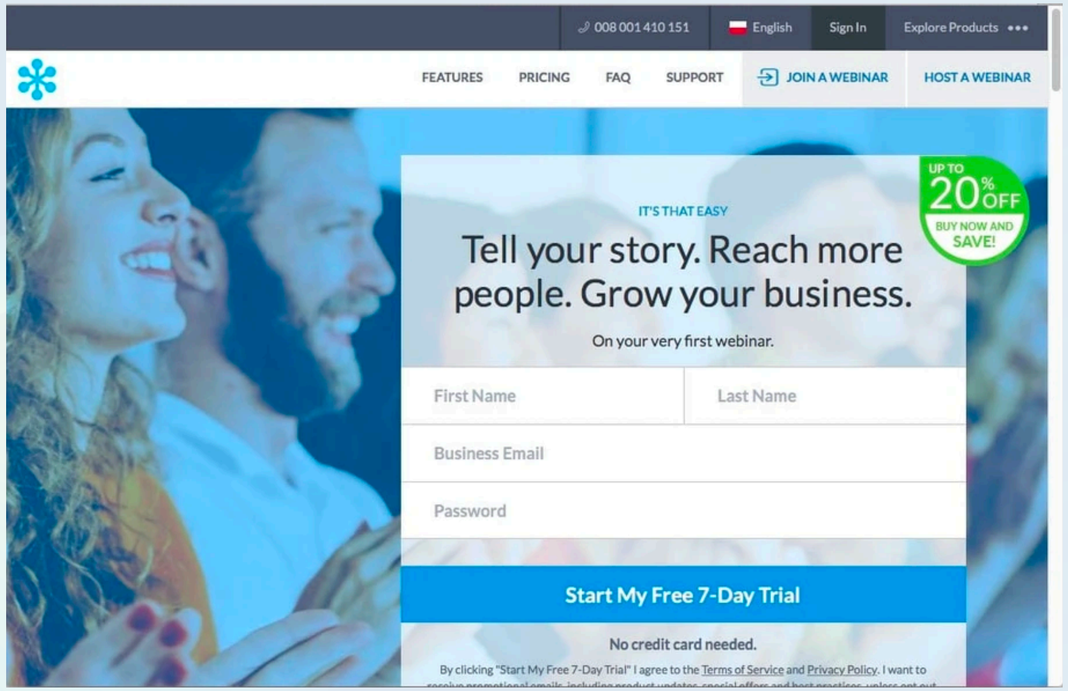
Webinar Software

GoToWebinar

- You're familiar with this user experience: it's what Virtual Coach uses!
- Offers a seven day free trial for testing, and the Starter plan goes for $109/month for 100 participants and one organizer
- Generate reports for information like source tracking, attendees, and events
- You can record and pre-record events for later viewing
- Participants can interact with the presenter by chatting and virtually raising their hands
- Not as automated as some other webinar software but has some of the best analytics tools



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Webinar Software

WebinarJam

- You can test it out for 14 days for just $1; plans start at $41/month
- Multiple webinar layouts: you can choose to have your webinar show your face, share your screen, show your face and your screen at the same time (picture in picture), or do a whiteboard with annotations
- Limited co-presenters: WebinarJam allows you to have up to 6 co-presenters

Virtual Coach

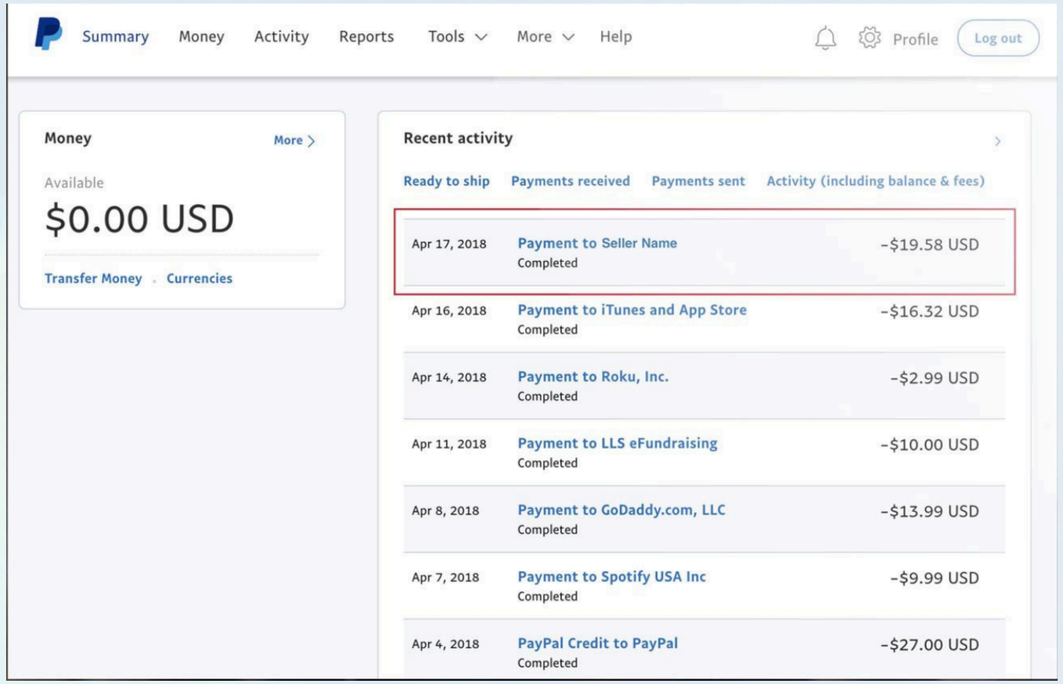
Payment Processors

As part of your sales process, you need to have two payment systems in place. One to take payment on a call when someone wants to book your right away, and a second to receive payment when people book a call with you, or you're launching a new package. You will need a tool that allows you to add payment links to a landing page, an email and to send a request for payment or invoice on a call for immediate payment.

Payment Processors

Currently the most popular payment gateway provider, PayPal allows you to receive online payments through credit, mobile and retail credit cards. The software does not require a PayPal account to complete a purchase.

Paypal



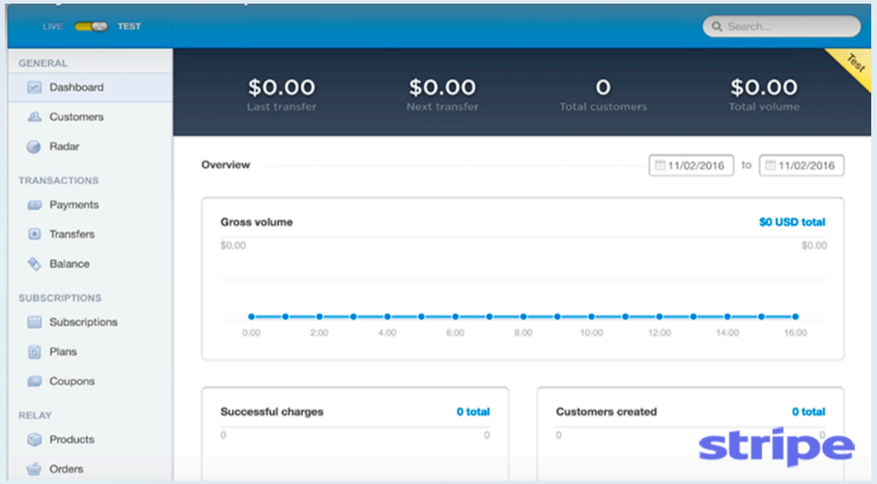
- Accepts all major credit cards, international cards and currencies
- You can make buttons for payments on your website
- Virtual Terminal allows payment over the phone
- Fees apply for chargebacks, refunds and subscription payments
- Mobile and in-store payments
- No setup charges or termination fee
- Charge a flat rate + a percentage of your transaction: 2.9% + 0.30 USD.

Payment Processors

Stripe is among the widely preferred payment gateway providers for internet businesses of various sizes because of how user-friendly it is. There are plugins and options available for you to create payment buttons for your website, or integrate with many popular invoicing software.

- Accepts all major credit cards
- International cards and currencies
- ACH Debits
- Alipay, Bitcoin, WeChat Pay
- No setup charges or termination fee
- Charge a flat rate + a percentage of your transaction: 2.9% + 0.30 USD.

Stripe



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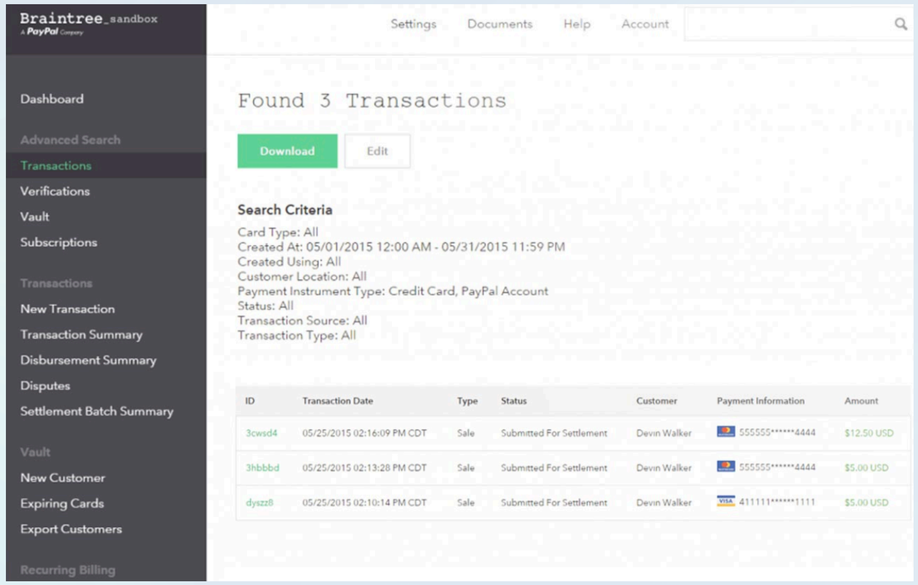
Payment Processors

Braintree is a global eCommerce tool that allows users to grow their business around the world. The payment gateway currently serves 40 countries, enabling online sellers to accept, split and accept payments. The software supports over 130 currencies, with partnerships with other notable platforms such as PayPal.

- Accepts all major credit cards
- Offers you the opportunity to access the global market
- Does not charge foreign exchange or cross-border fees
- Charges a percentage of your transaction: 2.9%

Braintree

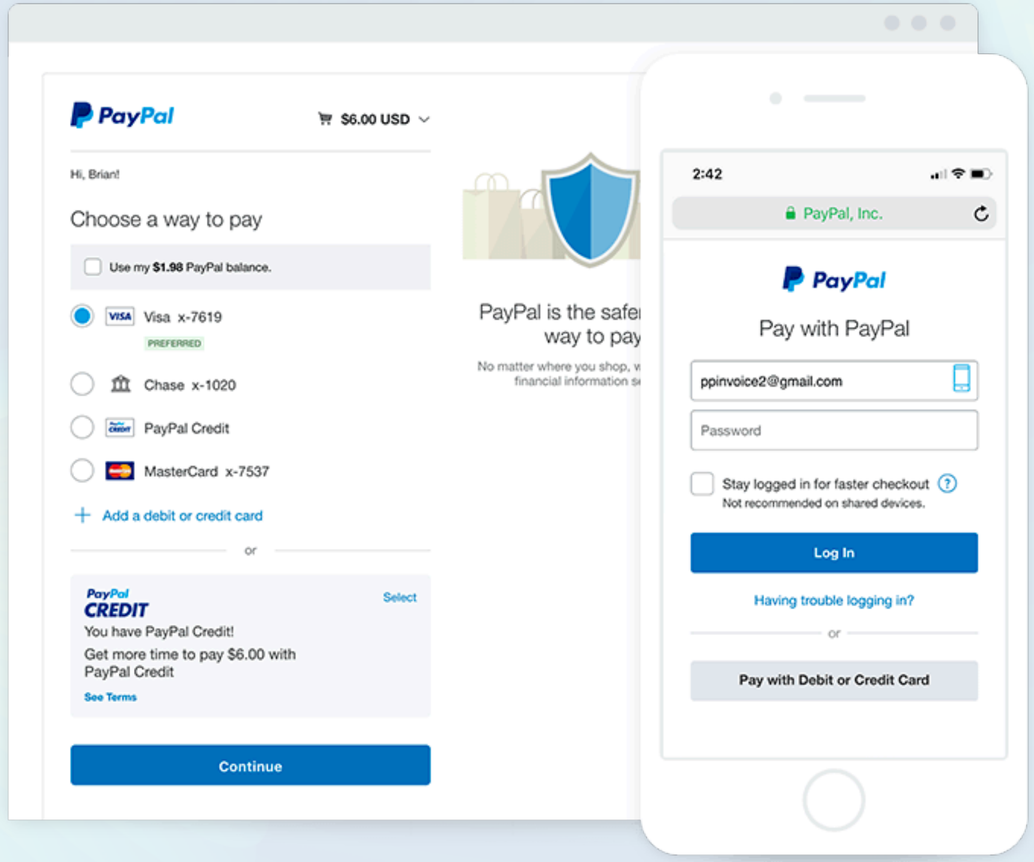


Invoicing

As a coach, having a streamlined method for creating, processing and tracking invoices is important for the integrity and impression of your business. There is a range of invoicing software available depending on your needs; I'll cover a couple here. do not hasten and invest in well-publicized trendy applications. Though these may be widely used, they may not be the perfect fit for your specific needs. Do your research, investigate each in detail, read a few software reviews, speak to the vendor for explanations if needed, and finally choose the product that suits you best.

Paypal

You can create and send an invoice in minutes, then choose to send your invoice via email or using a shared link. Add your logo, contact information, and custom fields to your invoice template - you can save it for fast access whenever you do your billing.



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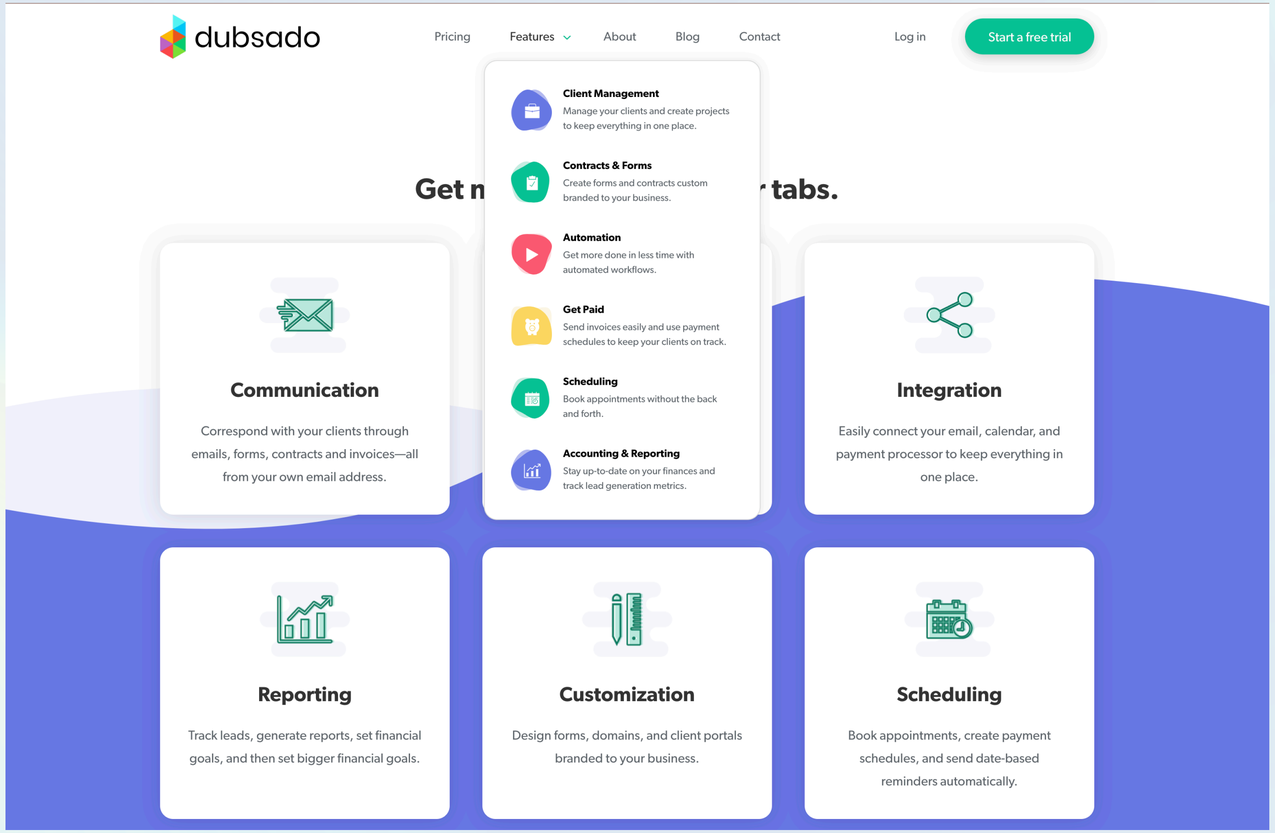
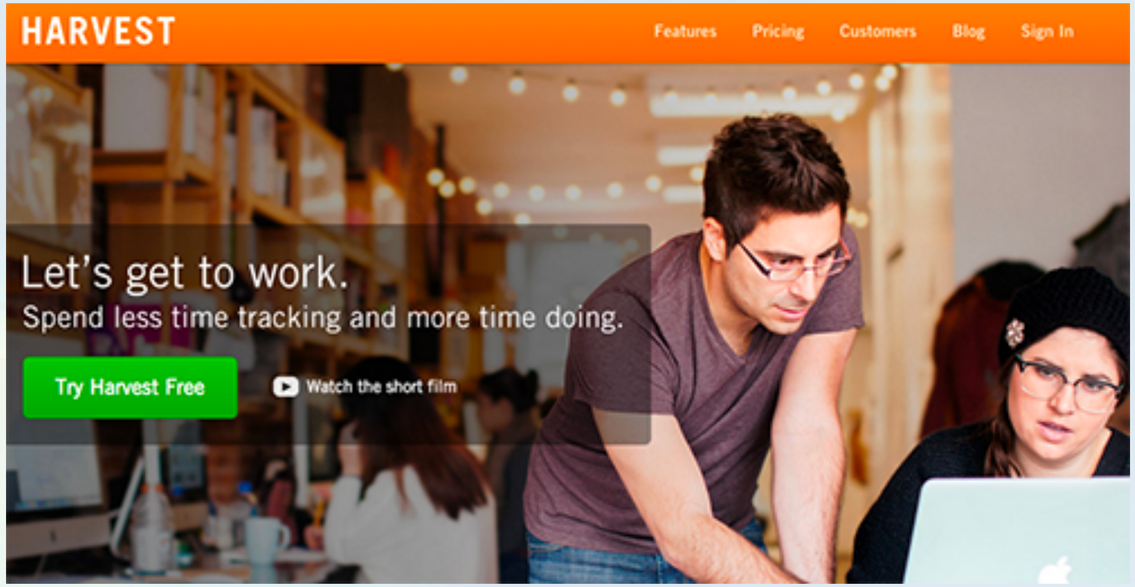
Dubsado

It's an amazing tool for coaches, consultants and also service providers. You can use this as a project management tool, to quote and email contracts (it also includes digital contract signing). It will also keep all your client transactions in ONE place, including projects, emails, contracts, appointments, payments etc. It's a one-stop-shop for your business. It starts at $35/month but you can try all the features for free on their basic account (will need to upgrade once you hit 3 clients).



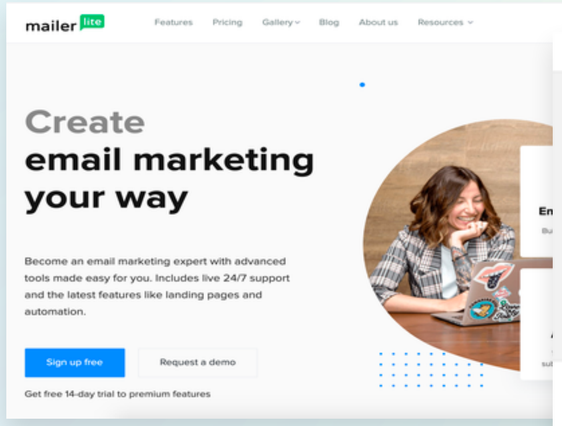
Harvest App

Harvest is a web-based business management application developed to provide businesses and individuals with a very useful time tracking tool. Aside from monitoring time, Harvest can also generate and send professional-looking invoices directly to customers. It can integrate with payment processors like PayPal or Stripe to collect payments.

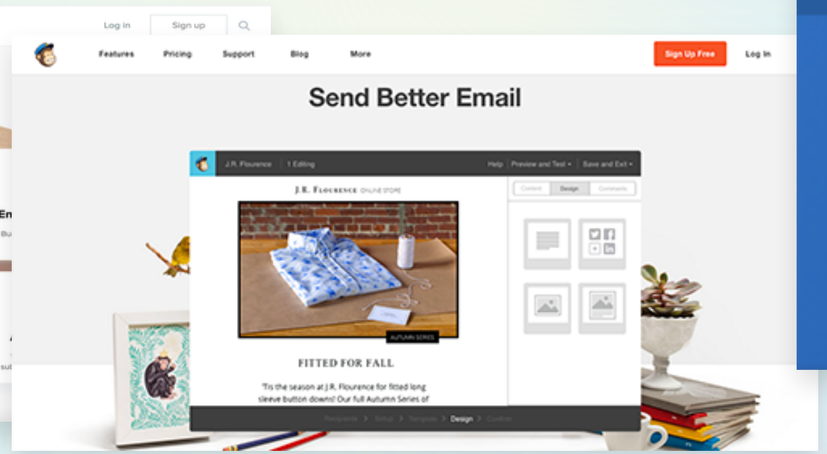


Email Marketing

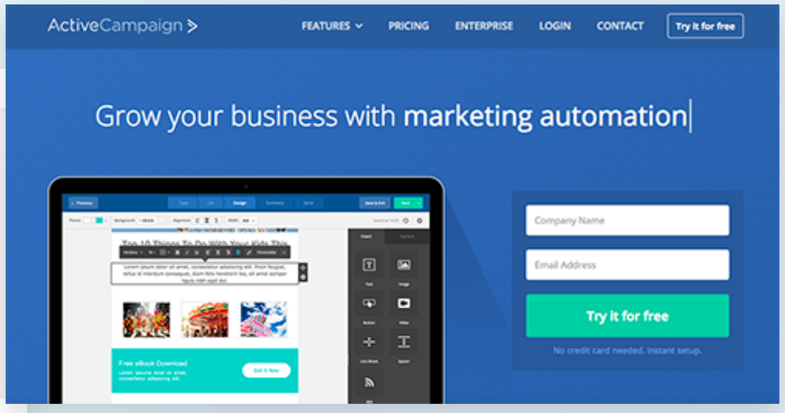
Once you create a free gift (a “lead magnet”) that shows your expertise and builds your email list, you’ll need email marketing software. Eventually, you can use this list to sell your coaching, consultancy or courses. (See Tech Tools Session Six for more on email.) A few great ones to check out for getting started:



MailerLite



Mailchimp



ActiveCampaign

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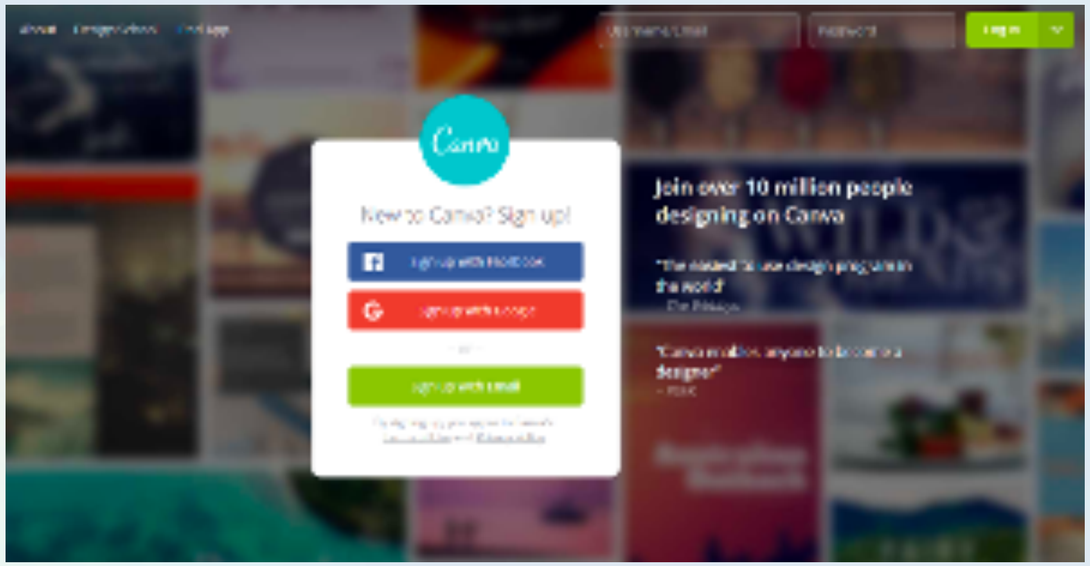
Canva

Need graphics for your presentations? How about social media images for your marketing campaigns? Do you want some visual charts or infographics to go along with your blog content?

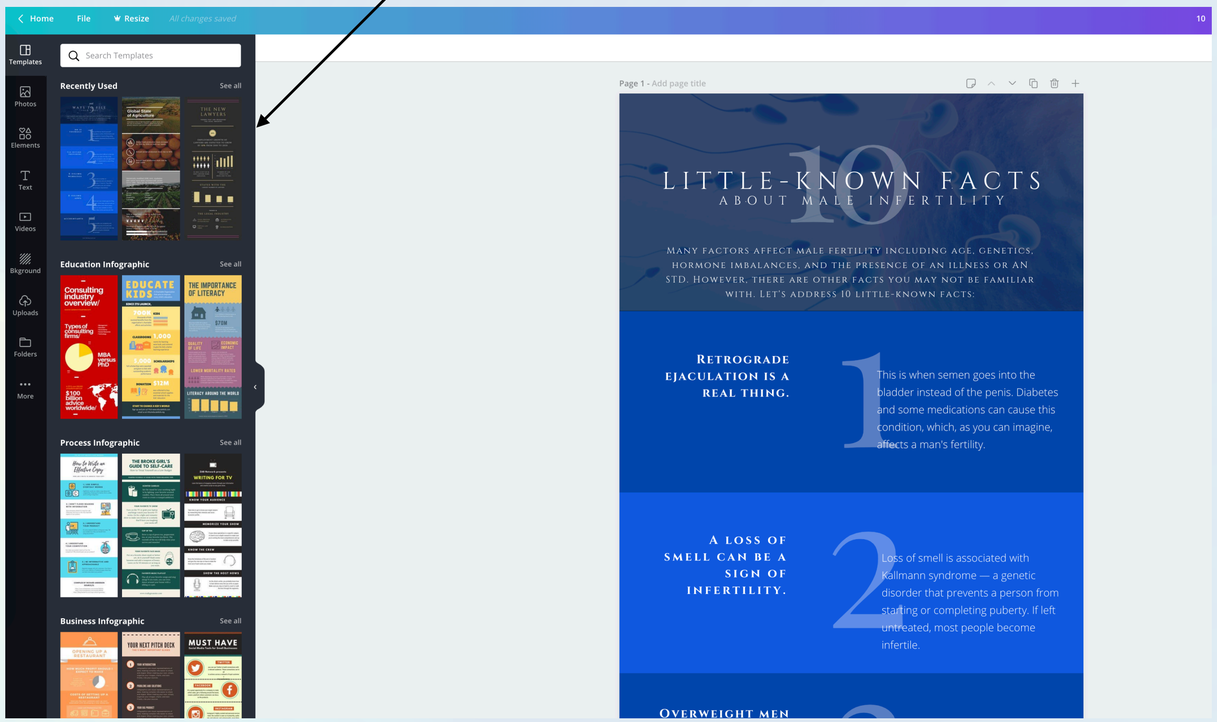


Canva templates are created by designers. You can use Canva templates as they are and make small changes only—for free! Your second option is to use Canva Pro – you can upgrade for a month (for under 13 dollars) and ask a designer to set it up with your colors, fonts and some elements from your website.

Canva

Canva's drag and drop editor, along with its vast selection of images, fonts, and templates, makes it easy for you to build documents and designs from scratch. Templates and designs can be configured so that you can share with others so they can edit, like a team member or virtual assistant.

Templates you can choose from



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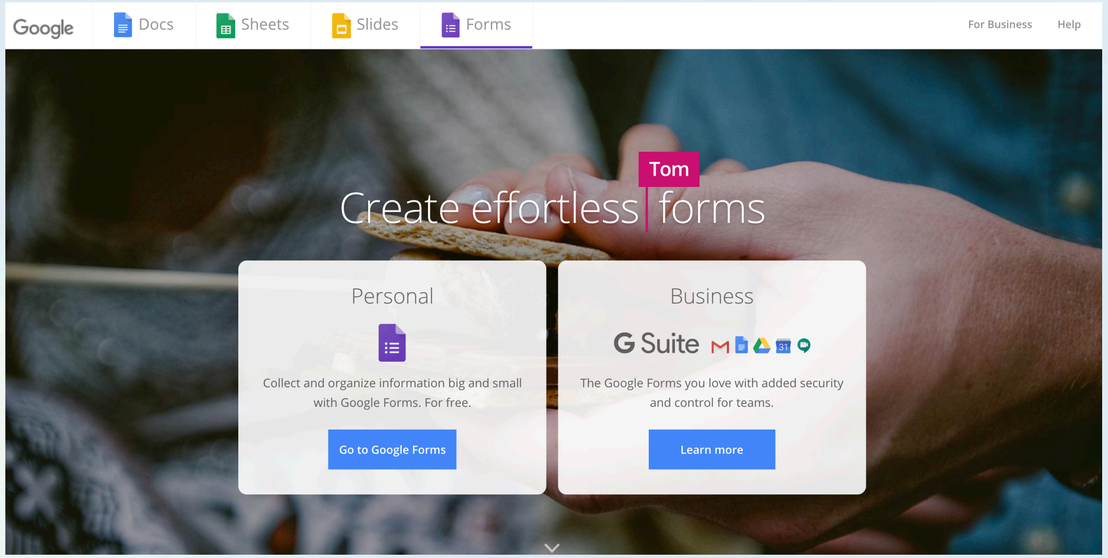
Google Forms

You can have forms that help collect information from clients for onboarding, use them to collect feedback from clients, onboard new clients, create client applications, etc. Google Forms is free, you can set it up with a Google account.



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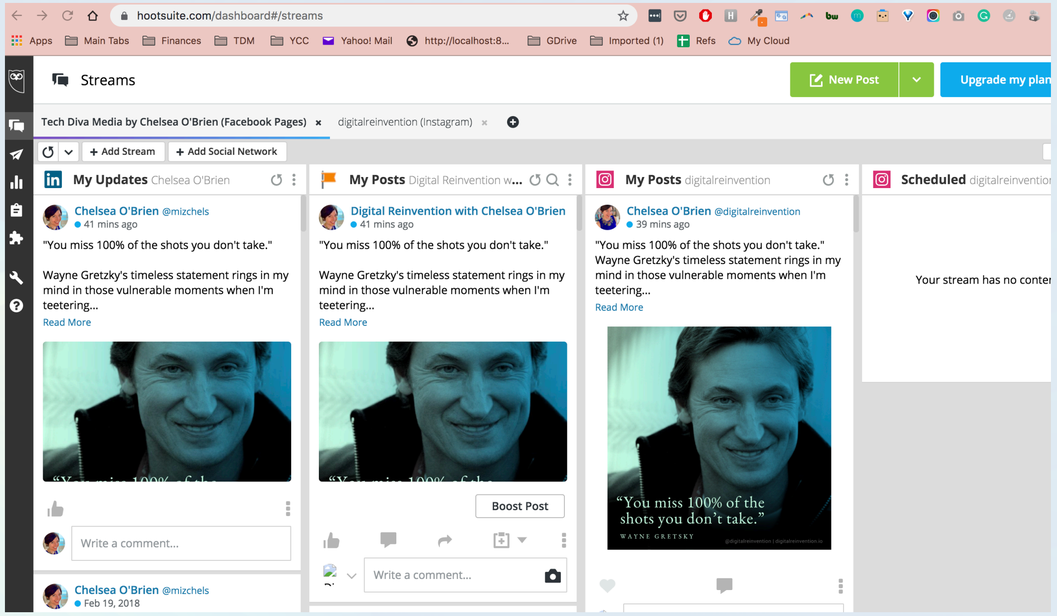
Hootsuite

Hootsuite helps you keep track of multiple social network channels. You can view streams from multiple networks such as Facebook, LinkedIn and Instagram and post updates or reply directly. Post to all of your social networks at once, or you can schedule posts for publishing into the future, which is helpful for “batching” your social media. It’s great also if you have someone helping you manage social media, as you can give them access to Hootsuite instead of your individual accounts. The free version works with 3 social networks and 1 user; upgrade to add users and networks. Other popular options include Buffer and Sprout Social.



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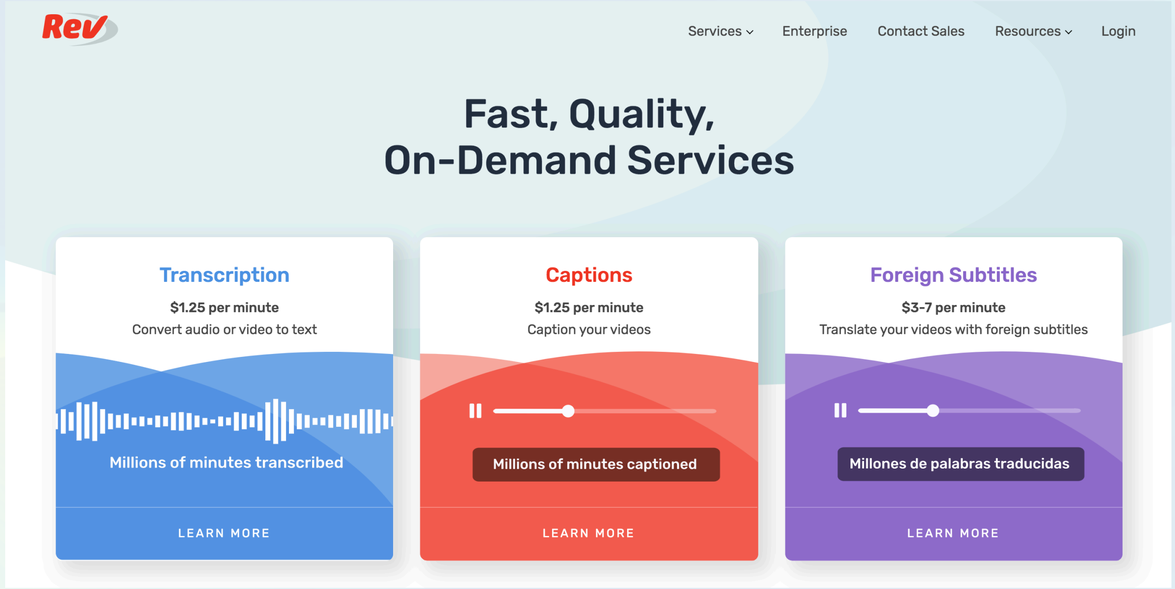
Rev.com

If there's a phone call, video, podcast or other media you would love to have transcribed…rev.com is your answer. You can send your media file and have it turned into text for $1.25/minute. You can also get captions created for your videos (which is helpful for your viewers as well as SEO) or get foreign subtitles created.



Questions