GETTING STARTED GUIDE

Coach Hub

Your complete Notion client management system for coaches

SET UP IN UNDER 30 MINUTES · NO TECH EXPERIENCE NEEDED

WELCOME

Welcome to Coach Hub

Thank you for purchasing Coach Hub - the Notion template built specifically for coaches who want to stop losing track of their clients and start running a more organised, more profitable coaching business.

This guide covers everything you need to get set up and running. You do not need any technical experience - if you can use Google Docs, you can use this.

THE TOOLKIT

What's Inside Your Template

Clients database	Your complete client CRM: one row per client. Stores contact details, block size, payment status and re-sell alerts.
Sessions database	Log every coaching session. Session numbers count automatically per client. Linked directly to your Clients database.
Onboarding tracker	A checklist for every new client: contract, invoice, intake form, welcome email. Auto-marks complete when all done.
Income tracker	Log every invoice and payment. Status updates automatically: overdue invoices flagged after 14 days.
5 pre-built views	Monday Dashboard, This Week's Sessions, Awaiting Payment, Onboarding In Progress, Monthly Income: all ready to use.

GETTING SET UP IN 5 STEPS

Follow these in order

Follow these steps in order the first time you open your template. The whole process takes under 30 minutes.

1. **Duplicate the template into your Notion**

   Click the template link you received. In the top right corner of the page, click the 'Duplicate' button. The entire template copies into your own Notion workspace instantly.

2. **Add your first client**

   Go to the Clients database. Click '+ New' and add a row for your first client. Fill in their name, block size (default is 12), block value in £ or €, payment status, and start date.

3. **Log your first session**

   After your next coaching session, go to the Sessions database. Click '+ New' and add a row. Select the client from the dropdown - their Sessions used count will update automatically in the Clients database.

4. **Record your first invoice**

   Go to the Income database. Add a row with the client name, amount, and date invoiced. When payment arrives, add the date paid - the status will automatically change to Paid.

5. **Check your Monday Dashboard**

   Open the Clients database and click the 'Monday Dashboard' view tab. This shows all your clients sorted by re-sell alert - red at the top, green at the bottom. Check this every Monday morning.

> **TIP**
>
> Add 3-5 clients in your first session so you can see all the features working together. The template includes sample data (Client A, B, C) which you can delete once you've added your own clients.

THE CORE FEATURE

Understanding Your Re-sell Alerts

The re-sell alert is the most powerful feature in Coach Hub. It tells you exactly when to reach out to each client about their next block - automatically, without you having to count sessions or check spreadsheets.

The alert lives in your Monday Dashboard view and updates in real time every time you log a session.

- **On track – 5 or more sessions remaining**
  No action needed. Your client has plenty of sessions left in their current block.
- **Re-sell SOON – 3 to 4 sessions remaining**
  Start the conversation. Mention in your next session that you are coming to the end of the block and ask if they would like to continue.
- **Re-sell NOW – 2 or fewer sessions remaining**
  Reach out today. Send a message or bring it up in your session. Do not wait - clients who run out of sessions without a plan often do not re-book.

> **TO TEST IT**
>
> Temporarily change a client's block size to 2 in the Clients database. Their alert will immediately flip to Re-sell NOW. Change it back to see it return to On track.

WHY THIS MATTERS

Most coaches lose clients not because the coaching is not working, but because the block simply ends and nobody follows up in time. The re-sell alert removes that gap entirely - you will never be caught off guard again.

Tracking Your Income

The Income database handles three things automatically so you never have to chase your own records: payment status, overdue alerts, and monthly revenue grouping.

Payment Status - How It Works

Each invoice tracks its own status automatically as you add the date invoiced and date paid, so you always know at a glance who still owes you.

- **Paid**
  You have entered a date in the Date paid column. The invoice is settled.
- **Awaiting Payment**
  Invoice has been sent but no payment date has been entered yet.
- **Overdue**
  Invoice was sent more than 14 days ago and no payment has been received.

Monthly Income View

Click the 'Monthly Income' tab in your Income database. All paid invoices are automatically grouped by the month payment was received - not when it was invoiced. This gives you an accurate picture of actual cash received each month.

Each month group shows a SUM total at the bottom - your revenue for that month at a glance. This is your self-assessment-ready income record.

> **TIP**
>
> For retainer clients, add a new row in the Income database each time you invoice. Keep the Date paid blank until payment arrives, the status updates itself.

BRANDING

Making It Yours

Coach Hub is designed to be fully brandable. Here is how to apply your own colours and make it feel like your business.

Select a heading or section

Click on any heading text in Notion. Use the text formatting toolbar that appears to change the text colour to your brand colour.

Change background colours

Highlight any text or block → click the colour icon → choose 'Background' → select the closest colour to your brand. Notion has a limited colour palette but works well for clean, minimal styling.

Update the page title

Click on the 'Coach Hub' title at the top of the page and replace it with your own business name - e.g. 'Sarah's Coaching Hub' or 'The Coaching Workspace'.

Add a cover image

Click 'Add cover' at the top of the page. Choose a gradient or solid colour that matches your brand. You can also upload a custom banner image if you have one.

LEVEL UP

Upgrading to Coach Hub Pro

Coach Hub Pro includes everything in this template plus a dedicated client-facing portal page for each of your clients. Share their portal so they can view session notes, tick off homework and access resources.

If you have any questions about setting up your Coach Hub template, I am here to help.

Coach Hub

£47 · one time

Backend system only
Client CRM + sessions
Income + onboarding
5 pre-built views

Coach Hub Pro

£87 · one time

Everything in Coach Hub
Client-facing portal pages
Homework clients can tick off
Resources section per client
Sharing instructions included

DONE FOR YOU

Want Me to Set It Up for You?

If you would rather hand this over completely, I offer a done-for-you Notion setup service where I come into your account and set everything up - customised to your client list and brand colours.

COACH HUB DONE-FOR-YOU SETUP

£397

I set up your entire Notion system inside your own account - customised to your clients, your block sizes, and your brand colours.

Includes: full setup, brand colours applied, 30-minute handover, 2 weeks email support.

To book: reply to your purchase confirmation email or email Lauren@savage-va.co.uk

FAQ

Frequently Asked Questions

Do I need a paid Notion account?

No - Coach Hub works completely on Notion's free plan. If you use Coach Hub Pro and want to share portals with more than 10 clients at once, Notion Plus (£8/month) is recommended.

Can I add more than 3 clients?

Yes - the template supports unlimited clients. Just click '+ New' in the Clients database to add as many as you need. Delete the three sample clients (Client A, B, C) when you are ready.

Can I change the block size from 12?

Yes - just change the number in the Block size column for each client. The Sessions remaining and Re-sell alert will update automatically.

Will updates to the template affect my copy?

No - when you duplicate a Notion template you get your own independent copy. Any updates made to the original template do not affect yours.

Can I use this for euros instead of pounds?

Yes - in the Income database, click on the Amount column → Edit property → Number format → change to Euro. This updates the currency symbol throughout the Income database.

Thank you for choosing Coach Hub

Savage Virtual Assistance · savage-va.co.uk