SAVAGE VIRTUAL ASSISTANCE

GETTING STARTED GUIDE

Coach Hub Pro

Your complete Notion client management system with client-facing portals

SET UP IN UNDER 45 MINUTES · NO TECH EXPERIENCE NEEDED

WELCOME

Welcome to Coach Hub Pro

Thank you for purchasing Coach Hub Pro, the premium version of Coach Hub, built specifically for coaches who want to give their clients a professional, dedicated space to view their session notes, homework and resources.

Coach Hub Pro includes everything in Coach Hub, plus a client-facing portal for each of your clients.

This guide covers everything you need to get set up and running.

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.
Client portals	A dedicated, shareable page for each client to view session notes, tick off homework and access resources.
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 6 STEPS

Follow these in order

Follow these steps in order the first time you open your template. The whole process takes under 45 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. **Set up your first client portal**

   Go to the Client Portals section at the bottom of your Coach Hub Pro page. Duplicate the Client Portal Template, rename it with your client's name, and share it with them, full instructions on the next page.

6. **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.

CLIENT PORTALS

Using Your Client Portals

Coach Hub Pro includes a dedicated portal page for each of your clients.

This is a private Notion page you share directly with them, they can see their session notes, tick off homework, and access resources you have shared.

They cannot see anything else in your workspace.

What Your Client Can See

- Their session notes, updated by you after each call
- Their homework and actions, they can tick these off themselves
- Their next session date and join link
- Any resources, links or documents you have added for them
- A notes section for their own reflections and questions

SHARING

How to Share a Portal With a Client

1. **Open the client's portal page**

   In your Coach Hub Pro page, scroll down to the Client Portals section. Click on the portal page for the relevant client, e.g. John Smith - Portal.

2. **Click Share in the top right corner**

   The Share panel will open. Click 'Invite a person'.

3. **Enter your client's email address**

   Type their email in the search box. Their name may appear if they already have a Notion account.

4. **Set permission to Can edit**

   Choose 'Can edit' from the dropdown, this allows your client to tick off homework and add their own notes in the Notes section.

5. **Click Invite**

   Your client will receive an email from Notion with a link to their portal. They do not need a Notion account to view it, they can open it as a guest.

> **TIP**
>
> Let your client know they can tick off their homework actions and add their own notes, but ask them not to delete any headings or sections. In practice, clients rarely do this.

NEW PORTALS

Adding a New Client Portal

1. ### Open the Client Portal Template page

   This is in the Client Portals section of your Coach Hub Pro page. It is your master copy, never fill this in with real client data.

2. ### Duplicate it

   Click the ··· menu in the top right corner of the page, then click Duplicate. A copy appears called 'Client Portal Template (1)'.

3. ### Rename it

   Click on the title and rename it with your new client's name, e.g. Sarah Jones - Portal.

4. ### Share it

   Follow the sharing steps above to invite your client via email.

5. ### Save the share link

   Once shared, copy the page URL from your browser. Go to your Clients database and paste it into the Portal link column next to that client's row, so you always have it to hand.

> **NOTE**
>
> Notion's free plan allows up to 10 guests at once. If you have more than 10 active clients with portal access at the same time, upgrade to Notion Plus (£8/month) to remove this limit.

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 Pro is designed to be fully brandable.

Both your backend system and your client portals can be styled to match 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'.

Brand your Client Portals too

Open each client portal page and apply the same colours and title styling. Your client sees a professionally branded space that matches your business identity.

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.

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

NEED HELP?

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

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.

What can my client actually see?

Only their own portal page. They cannot see your Clients database, Income tracker, Sessions database, other clients' portals, or any other page in your Notion workspace.

Can my client edit their portal?

Yes, when you share with 'Can edit' permission, clients can tick off homework and add notes in the Notes section. They cannot edit your session notes unless you specifically leave a blank editable area for them.

Can I add more than 3 client portals?

Yes, duplicate the Client Portal Template page for each new client. There is no limit to how many portal pages you can create.

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

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