

Business Systems Checklist

Coaching/ Appointment-Based

One-off Products/ Courses

Memberships

Need	Have	N/A	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ability to Schedule Appointments (Setmore, Calendly, etc.)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Messaging Platform (Voxer, etc.)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ability to host Interviews/Meetings/Webinars (Zoom, etc.)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Website/Landing Page (Membervault, Kajabi, Wordpress, Aweber, Leadpages, etc.)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Podcast Platform (Libsyn, Kajabi, etc.)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ability to collect email addresses/send emails (Aweber, Kajabi, Mailchimp, etc.)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ability to deliver an Opt-in on email sign-up (Aweber, Kajabi, Leadpages, etc.)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Method of receiving payment (Stripe, Paypal, Square, etc.)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Customer Relationship Management (CRM) (Monday.com, etc.)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ability to receive customer information via forms (Monday.com, Google Forms, etc.)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Flowchart Creator to organize everything (invisionapp.com, Canva, etc.)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Graphics program (Photoshop, Canva, etc.)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ability to edit Video (iMovie, Canva, etc.)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ability to edit audio (iMovie, Audacity, etc.)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Video/Audio Recording (Zoom, etc.)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Screensharing/Ability to record screen (Zoom, Loom, etc.)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Video Host (Youtube, Vimeo, Kajabi, etc.)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ability to password protect paid content (Membervault, Kajabi, Thinkific, etc.)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Content Planner (Monday.com, etc.)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Community Area/Forums
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____

My Tech Stack (The programs/platforms/SaaS products I currently use):

- Draw a line between platforms that are currently integrated well and "talking" well to each other.
- Add an asterisk * by platforms that are filling the same role as something else on the list.
- Is there anything you see that you are missing or that is complicated and needs to be removed?
- Is there anything that needs to be added?