Ready-Made Website Customization Checklist
"DO IT YOURSELF" Option

How You Will Use This Checklist:

Use this form to collect the customization information you will need to add to your site. Once completed, and after you have purchased hosting and installed your website, you will use this guide to take you step-by-step through all the places that require customization or need to be connected to outside services.

COACHES: READ CAREFULLY!

Use this data collection form in conjunction with the step-by-step instructions we have created for you here:

https://showcase.bravethinkinginstitute.com/do-it-yourself

- **Type/paste your information directly into this form.** Be sure to click "Save" before closing each time. **Prefer to handwrite?** Print it out and write down your information instead.
- **Go through this checklist, step-by-step, and fill out the information requested in each section.**
  Note: You will see some repetitive information requested for different web pages, such as first/last name, etc. This is for your convenience for copy and paste of the information during the customization process.

ADDITIONAL INSTRUCTIONS IN RED

- **Throughout this Checklist, you will see notes in red along with red check boxes.**
  This is to help you keep track of the customizations needed throughout the site.

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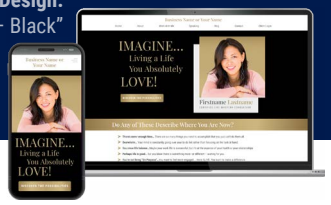

Website Customization Checklist

Login Info for Implementation of Third-Party Services

Coach, please check the appropriate options, and fill out the login and password information for each service requested (or ask that the account be created on your behalf).

Website Domain Name (your website name) (Select A or B)

☐ A. I purchased my Website Name from:

☐ GoDaddy

☐ Other Provider

Domain Name (Website Name)

Login Email or Username

Password

☐ B. I don't have a website name yet. Please purchase it on my behalf. I'll contact you with my billing info*.

Website Name I Want

Domain Email (Email using website address) (Select A or B)

☐ A. I'm all set – I don't need help with this.

☐ B. Please create a Google Workspace Business Starter account for me. I'll contact you with my billing info*.

Email Address I Want

Examples:
Firstname@YourWebsiteName.com
Firstname.Lastname@YourWebsiteName.com
Admin@YourWebsiteName.com

Calendly Account

☐ A. I don't have an account yet. Please create a FREE Calendly account for me.

☐ B. I have a Calendly Account. Here's my login details:

Login Email or Username

Password

**** Note: Your Website Name and Domain Email are paid services,*** *and will require a credit card. If a professional is creating these accounts for you, contact them directly to provide them with your card number and billing address. They will need that information before they can proceed.*

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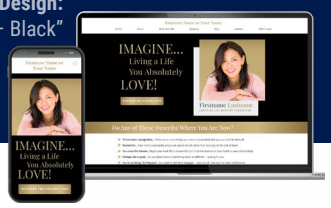

Website Customization Checklist

****** NOTE: This site is built using Elementor.**
Always choose"Edit with Elementor" when making any edits to Pages ****

Only single post blog pages are edited using the standard WordPress editor

Certification Level:

☐ DreamBuilder Coach ☐ Life Mastery Consultant

HOME PAGE LAYOUT VERSION – VIDEO OR NO VIDEO

Home Page Options (Check the option that applies and choose your preferred layout)

☐ **I DO NOT have a Welcome Video**

☐ **Yes I Have a Welcome Video** (Upload your video to either Vimeo or YouTube and past the link here)

Webmaster: If this option is selected, there is an optional home page layout with a video.
Go to **Dashboard** > **Appearance** > **Customize** and then under Home page options, select: **home-with-video**

Webmaster: Add link above to **Welcome Video.**

HOME PAGE CONTENT

First and Last Name as you want it to appear throughout the "Home" page

Webmaster: Replace **Firstname** and **Lastname** under photo

Title Under Name

☐ Certified DreamBuilder Coach ☐ Certified Life Mastery Consultant

☐ Other

Ways I Serve Section

Speaking
Replace **Firstname**

Transformationl Coaching
Replace **Firstname**

About
Replace **Firstname**

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HOME PAGE PHOTO

Home Page Photo

***** File Saving Option for All Images *** :**

1) Choose "save for web" **.jpg** format compressed to 60.

Inset Photo Option:

Desktop & Mobile Images:

Size to square format at:
EXACTLY 828 pixels wide x 828 pixels tall

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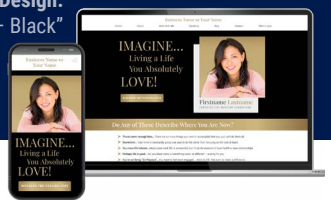

Website Customization Checklist

HEADER

Site Name (The name you want displayed at the top of every page – usually your name or your business name)

Webmaster: To edit header, go to home page. Hover over the "Edit with Elementor" menu at top and choose **Header**. Replace placeholder **Site Name**

Webmaster: Update **Site Identity** from the dashboard Appearance > Customize menu

FOOTER

Footer Phone Number (The main phone number you want clients to call)

Webmaster: To edit Footer, go to home page. Hover over the "Edit with Elementor" menu at top and choose **Footer**. Replace placeholder **Phone Number**

Webmaster: Replace **Site Name** in footer area. Upon "Update" choose Include Entire Site, Save & Close.

Footer Social Media Links (List the link to any social media accounts you want to be featured on your website. If you don't have any social media accounts to list, leave blank)

Webmaster: Update any active social media links. **Delete** any unused social media options.

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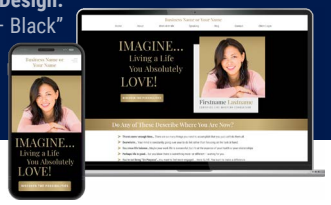

ABOUT PAGE

Your First and Last Name as you want it to appear throughout the "About" page

Webmaster: Update **Page Title;** Update **Name** on Side of Photo

Page Content

Webmaster: First Paragraph – replace **Firstname; Second Paragraph** – replace **Firstname** & **Firstname's**

Photo

Webmaster: Replace photo. Make sure about page photo is sized to **EXACTLY 778 pixels wide x 910 pixels tall**

Biography Section – *COACH: Below is the default content that appears on your site.*

1) Please replace "firstname" and "lastname" with your name as you want it to appear.
2) Edit any of this content or leave as is. Whatever is in this box is the content that will be used on your "About" page.
3) Optional – As a suggestion, you might consider also including a sentence or two about the following:
• where you live • what your passions are • your coaching specialty if have one • what makes you unique
• any extra degrees, education or experience you might have • the "aha" moment when you decided to become a coach

Color text next to photo:

As a Life Mastery Consultant, certified by Brave Thinking Institute, Firstname Lastname can help you design and manifest a life that's in harmony with your Soul's purpose.

Firstname inspires and empowers people to live their highest vision in the context of love and joy. Firstname's passion is teaching clients to unlock their true potential, achieve outrageous success, and live a life they LOVE living!

Bio Section Below Photo:

Firstname is an inspiring speaker, passionate educator, and a highly sought after transformational coach. Now combining this background with the proven Brave Thinking® technology, Firstname is helping clients achieve extraordinary results in accelerated time – helping them transform their lives and close the gap between the life they were living and a life they absolutely LOVE living.

Firstname offers content-rich, interactive workshops that takes participants on a journey in which they design, define, test, and experience a crystal-clear vision of the life they would love – a life that is in alignment with their highest purpose. They will have a unique opportunity to "step into" the life they are imagining and feel a resounding "yes!"

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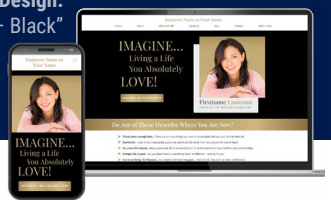

Website Customization Checklist

CLIENT LOVE (TESTIMONIAL) SECTION

☐ **YES, I have testimonials and have included them below.**

☐ **NO, I don't have testimonials yet, and will use a replacement option on the following page.**

Webmaster: If "NO" was selected, move on to the next page and use the testimonial replacement text instead.

Three testimonials are an ideal number to have in this section, but you can include more or less if you wish.

Testimonial #1 (Provide 45-60 words):

Testimonial Credit:

Testimonial #2 (Provide 45-60 words):

Testimonial Credit:

Testimonial #3 (Provide 45-60 words):

Testimonial Credit:

Webmaster – Update Testimonials on these pages:

About Page; **Work With Me** Page; **Speaking** Page

Delete any unused placeholder testimonials.

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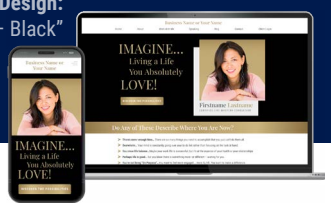

Website Customization Checklist

** If you don't yet have testimonials, here are 2 replacement options you can use instead **

(Coach – Select the Testimonial Replacement Option you prefer to use)

Note to Webmaster: If testimonials were used on the previous page ignore this page and move on to the next one.

☐ **Testimonial Replacement Option for About Page and Speaking Page**

Header to replace "Client Love":
Your Dream Is Within Reach

Quote:
Wonderful things are seeking to happen with you. They don't happen by pursuing what you think is possible based on your situation, circumstances or outside conditions. They happen by living from a vision that is born from the question, "What would I LOVE?" I can show you how.

Credit: _____

Coach's Name

Webmaster: Update placeholder testimonials and delete any unused

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☐ **Testimonial Replacement Option for Work With Me Page**

Header to replace "Client Love":
Let's Shift Things Together

Quote:
You can't change what's showing on your TV by yelling at it or trying to fix the screen. You have to actually change the channel and tune in to a new frequency. Your life is just like that. The more you are in tune with what you would love instead of what you want to change, the more you'll attract the right ideas and steps that lead you to it. I'd love to show you how.

Credit: _____

Coach's Name

Webmaster: Update placeholder testimonials and delete any unused

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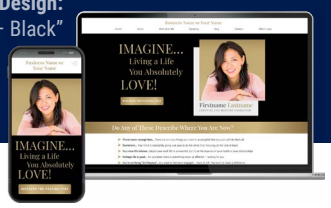

SPEAKING PAGE

Your First and Last Name as you want it to appear throughout the "Speaking" Page

First Block "Outstanding Speaker"

Webmaster: Subhead – Replace **Firstname's**

Second Block "A Speaking Experience Tailored Specifically for Your Audience"

Webmaster: First Sentence – Replace **Firstname; Webmaster: Third Sentence** – Replace **Firstname**

Third Block "Book Firstname for Your Next Speaking Event"

Webmaster: Replace **Firstname** with **First Name**

Speaker Kit

(A .zip file containing your one sheet or bio, professional head shot photo, speaking topics, AV requirements, etc.)

☐ **YES, I have a Speaker Kit. It is provided**
Webmaster: Upload the Speaker Kit .zip and **link** to PDF download icon

☐ **NO, I don't have a Speaker Kit**
Webmaster: Delete the Speaker Kit button

CONTACT PAGE

Phone Number(s) (Check and list the phone number if it is applicable to you. You don't need to have 2 different phone numbers, but many coaches (for professional reasons) prefer to keep their business and personal phones separate.

☐ **Office** ☐ **Mobile**

Webmaster: Update Phone number(s)

☐ **Contact and Discovery Session Forms: Submit to this email address:**

Webmaster: Edit & have coach verify admin email in Settings area. See step 8 on pg.14 for more details.

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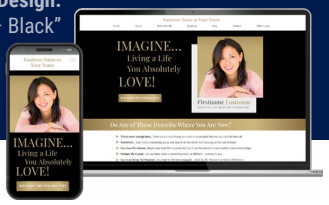

CONNECT CALENDLY CALENDAR

1. (Choose One)

☐ **I want my Professional to create a FREE Calendly account for me.**

My Email Address

☐ **I have already created my FREE Calendly account. My login info is:**

Login Email or Username

Password

2. (Choose One)

☐ **My Discovery Sessions are 30 Minutes**

☐ **My Discovery Sessions are 60 Minutes**

*****COACH:** YOU are responsible for the ongoing management of your Calendar. You will need to log into your Calendly account and determine the days and times you wish to be available to your clients. They will schedule their own appointments based on your availability shown. If you don't wish to use Calendly, you can request to have it deleted from the page and the wording at the top of the Discovery Page adjusted.*

Webmaster: Paste the Inline Embed Code for the Calendly Account here:

Webmaster: Update **Calendly Inline Form Code** on website

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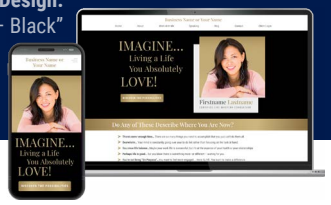

Website Customization Checklist

DISCOVERY/STRATEGY SESSION REQUEST PAGE

Your First and Last Name as you want it to appear throughout the "Discovery Session" Page

Steps 1, 2, 3

Webmaster: Replace **Firstname** under all three steps

"A Little About Firstname" Section

Webmaster: First Paragraph – Replace **Firstname Lastname**

Webmaster: Second Paragraph – Replace **Firstname,** Replace **His or Her** as appropriate

Webmaster: Third Paragraph – Replace **Firstname** with **Your Firstname**

Photo

Replace photo. Make sure to size photo to **EXACTLY 778 pixels wide x 910 pixels tall**

OPTIONAL CUSTOM 404 ERROR PAGE

Webmaster: Configure the **Custom 404 Error Page** (under "Pages" titled **Page Not Found**). Requires paid upgrade to Elementor Pro to use this page.

TERMS AND CONDITIONS PAGE

Webmaster – Replace **##Your Business Name##** with **Site Name/Coach's Name** in 2 places:

- 1st paragraph
- Under Intellectual Property heading

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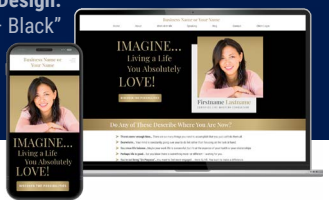

CLIENT LOGIN LANDING PAGE & CALL ARCHIVES

Teaching Call Archives (Choose One)

☐ **NO, I DO NOT Plan to Post Recording of My Teaching Calls for My Clients**

Webmaster – If "No": Remove Client Login from Navigation in header and footer areas

☐ **YES, I Plan to Post Recording of My Teaching Calls for My Clients**

It recommended that coach password protect the call archives pages and provide the password to their clients.

IMPORTANT NOTE FOR COACH REGARDING CLIENT LOGIN AREA

Once the initial setup of your site has been done by your professional, **YOU ARE RESPONSIBLE from here on out for any ongoing editing or support, including managing the recording and posting of your teaching calls.**

NEXT STEPS:

A) **Manage Client Login Area and Call Archives –** short video tutorial: https://vimeo.com/920817779/e481742bd3

B) **How to Password Protect Pages –** short video tutorial: https://vimeo.com/920835006/29a44519e5

C) **Get Some Additional Training in WordPress Elementor** to learn how to manage site updates youself. EVEN THOUGH THESE SITES ARE DESIGNED TO BE EDITED FAIRLY EASILY THROUGH THE ELEMENTOR PLUGIN, IT IS STILL A LEARNED SKILL. **It is still possible to mess up a web page** if you don't know what you are doing. Get some training first before you attempt to make changes, or consider hiring someone to help you.

D) **If you are not confident that you can handle posting weekly calls and managing password protection after watching the video above, consider hiring a Company or Virtual Assistant** to help you manage your weekly teaching calls and post them to the appropriate Call Archives pages each week, add new Class Icons and Call Archives pages as needed, regularly change and update passwords to Call Archive pages, and other content changes as needed.

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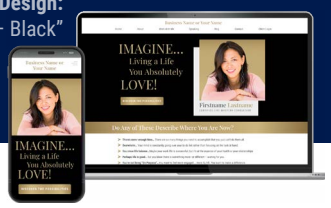

ADDITIONAL TIPS & INFORMATION

Photo Tips

- We highly recommend having your photos done by a professional, or at least someone with good photo skills.
- Consider scheduling a mini photo session, and have several poses taken that capture your personality. Use one pose for the "Home" page and a second pose (maybe more casual and relaxed) for the "About" page.
- Dress appropriately. In general, solid colors look better in photos than busy prints.
- No other people in your photos, and no cluttered or distracting backgrounds.
- The light should be coming from in front of you, not behind you.
- Be sure to include both shoulders and waist if you are planning to do a "cutuout" photo for your home page. In general, don't crop photos when taking them to give you the most options. They can be cropped down to later to fit your needs
- Provide final images the highest resolution possible.

Sizing Photos for Your Website:

- It's very important that your photos are cropped and sized to the exact pixel dimensions listed in this doc. You can find several services Online to assist with this. One popular service is: https://www.fotor.com/features/crop

For Advanced WordPress Users – Custom 404 Error Page:

- We have included a custom 404 Error page that you can select, but it requires upgrading to Elementor Pro. One Elementor Pro has been activated, download the 404Page plugin and then designate the page titled **Page Not Found** as the 404 error page.

COACHES WHO HAVE CHOSEN "DO IT YOURSELF"

If at any time this begins to feel overwhelming or more than you are willing to take on yourself, it is OK to hire help for SOME or ALL of the items required. Remember the most successful coaches outsource the things they are not proficient in whenever they can so they can be fully focused on their clients and building their business.

Should you choose to hire some assistance, we have provided a small list of professionals and freelance services who can assist you with hosting, installation, setting up your lead magnet and Calendly account, adding your personal information to your site, and everything else you need to get your website up and running. Or you can find professional website services on your own.

In addition, they may also offer additional services such as content and graphics creation, regular updates to plugins and software, marketing, content editing support, SEO, and more.

»» Hire a Professional ««

Believing In You!

Mat, Lauren and Your Life Coach Certification Team

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Important Site Installation Information for Webmaster

Please use the **All-in-One WP Migration** plugin for importing the provided WordPress ready-made website into your WordPress install

All-in-One WP Migration
By ServMask

Here are the steps – please read carefully:

1. **Create a new WordPress Site** on the hosting provider's server.
2. Login to the new WordPress site. Through the WordPress Dashboard, go to:
   Plugins > Add New Plugin > search for: **All-in-One WP Migration.** Select and install it.
3. Open the .zip file you received from the coach, and **locate the file with the extension .wpress.**
   You will be **importing** the .wpress file, NOT uploading the .zip file.
4. In the Dashboard, go to the plugin: **All-in-One WP Migration > Import**
   Check maximum file upload size.
   - If it is 200MB or above, proceed with the Import
   - If it is **below 200MB**, contact the hosting provider's support and **ask them to increase the upload limit to 250MB**.
5. Once the maximum file upload size has been increased, select **Import From > File** and browse to **select the provided WordPress file (with .wpress extension)** Follow the install prompts until complete.

   Note: This step will REPLACE everything on the install with a new website, INCLUDING LOGIN NAMES, PASSWORDS and any content that might exist. *If this is a brand new site, there won't be any images or content to be concerned with. If you are using an existing site with content, photos, .pdfs, etc, please note that EVERYTHING will be replaced, so be sure to download any assets you might need before performing the import.*
6. **Since the login on the install has now been replaced, login with this placeholder username and password:**
   Username: **new-bti-site** Password: **321#AccessNow$!**
7. **Once you have logged in, Update Permalinks:**
   - Go to Dashboard Panel and choose: **Settings > Permalinks**
   - Scroll to very bottom of the page and click the **"Save Changes"** button
   - Click on the **"Save Changes"** button **a second time** to force refresh the .css. You may not see any visible changes here, but performing these functions makes sure any existing links in the template update to the new site address.
8. **Update Admin Email Address:**
   - Go to Dashboard Panel and choose: **Settings > General**
   - Change the **"Administration Email Address"** to the **Coach's email address** and save changes.

   Important: *A confirmation email will be sent to the coach to accept the Admin email request.* ***The coach will need to locate this email and click on the verification link.*** *Do this with the coach over the phone or via text message to be sure it is done.* ***The email address will not update on the site*** *until the confirmation link is clicked. Once that has been done, you can check "Settings > General > Administration Email Address" to verify that the new email is in place so that the contact forms will be sent to the correct email address.*
9. **CREATE A NEW ADMIN LOGIN FOR THE COACH. Dashboard > Users > Add New User.** Use the Coach's name and email, and **set their Role to Administrator**. Send them the login credentials to their new website.
10. For security reasons, remove the user: **bti-new-site** – or – just edit that user name: Click on "Set New Password" button, add a new password, then click on the "Update Profile" button. This is just for an extra layer of security as other coaches using this design will have the same placeholder user with the same credentials.

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