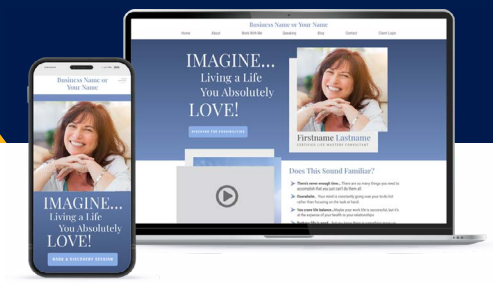
BRAVE THINKING INSTITUTE LIFE COACH CERTIFICATION

Your Website Design: "Imagine – Blue"



Before You Hand Off This Checklist to Anyone...

There's an easier way to get your website live.
AND YOU GET TO SKIP THIS CHECKLIST ENTIRELY.

Up until now, hiring help has looked like a scavenger hunt. Fiverr. Upwork. The kid of your friend's neighbor who "does websites."

Before you go down that road, take a look at the easiest option of all: receive white-glove, personalized support from start to finish…and beyond.

Get Heart-Centered Support in Launching Your Website Now.
Marketing, Design, Branding & Virtual Assistant Support When You're Ready Later.

Your Personal Concierge
Every client gets a concierge, your personal guide who connects all the moving pieces for you. Choose your website name, supply a photo of yourself and show up. They handle the rest. Seriously!

A Dedicated Tech Team Here for the Long Run
They'll customize and launch your site, keep your site running safely and smoothly, and are always ready to help you grow and expand at your own pace. Content edits, new pages, branding, whatever comes next.

High-Value Extras
Six or more header options for every website design, at no additional charge, for a more unique look without going custom right away. Stay in front of your clients with free inspirational marketing content delivered each month…and more!

HOW IT WORKS

1. Book a 15-minute consult. No obligation. No prep.
2. See your options. They'll walk you through them and recommend a starting point.
3. You decide. No pressure, ever.

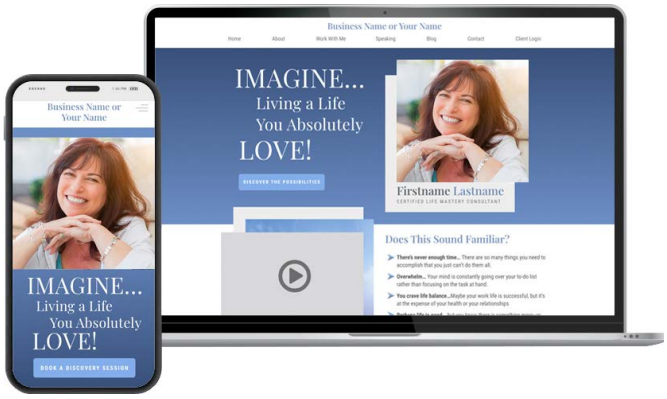
Start Here → coachwebsitesupport.com

Their goal is that you will leave feeling seen, supported and served… never "sold."

If you already have support lined up elsewhere: Start Your Checklist on Page 2 →

©Mary Morrissey® • Brave Thinking® Institute • www.BraveThinkingInstitute.com • All rights reserved • Unauthorized duplication is prohibited by law.

Ready-Made Website Customization Checklist
"HIRE A PROFESSIONAL" Option



How You Will Use This Checklist:

You will use this form to collect the customization information needed. Once completed, you will share the form with the professional you hire so they have the correct information to enter on your website.

COACHES: READ CAREFULLY!

Use this data collection form in conjunction with the step-by-step instructions:

https://showcase.bravethinkinginstitute.com/hire-a-professional

- **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 to assist your webmaster by having the information handy at the top of each section so they don't have to backtrack through the form to find it.

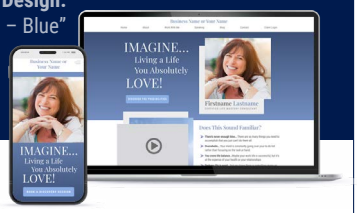
ADDITIONAL INSTRUCTIONS IN RED

- **Throughout this Checklist, you will see notes in red for "webmaster"** that can be used by the webmaster to keep track of the edits as the site is being customized. **You can ignore these notes and leave those functions for them.**

©Mary Morrissey® • Brave Thinking® Institute • www.BraveThinkingInstitute.com • All rights reserved • Unauthorized duplication is prohibited by law.

BRAVE THINKING® INSTITUTE LIFE COACH CERTIFICATION

Design:
"Imagine – Blue"



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

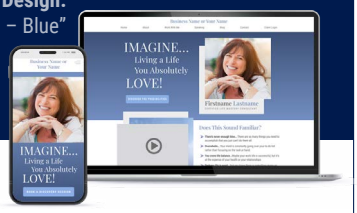
**** Note: Your Website Name and Domain Email are paid services,*** *and will require a credit card. If a professional is creating these accounts for you, contact them directly to provide them with your card number and billing address. They will need that information before they can proceed.*

©Mary Morrissey® • Brave Thinking® Institute • www.BraveThinkingInstitute.com • All rights reserved • Unauthorized duplication is prohibited by law.

BRAVE THINKING INSTITUTE LIFE COACH CERTIFICATION

Website Customization Checklist

Design:
"Imagine – Blue"



****** 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**

©Mary Morrissey® • Brave Thinking® Institute • www.BraveThinkingInstitute.com • All rights reserved • Unauthorized duplication is prohibited by law.

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:

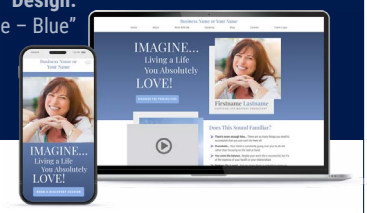
Size to square format at:

EXACTLY 762 pixels wide x 762 pixels tall

©Mary Morrissey® • Brave Thinking® Institute • www.BraveThinkingInstitute.com • All rights reserved • Unauthorized duplication is prohibited by law.

BRAVE THINKING INSTITUTE LIFE COACH CERTIFICATION

Design:
"Imagine – Blue"



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**

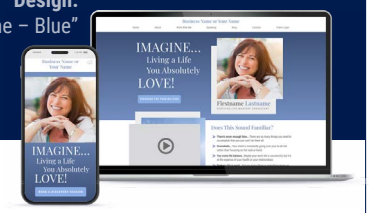
Webmaster: Replace **Site Name** in footer area. Upon "Update" choose Include Entire Site, Save & Close.

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.

©Mary Morrissey® • Brave Thinking® Institute • www.BraveThinkingInstitute.com • All rights reserved • Unauthorized duplication is prohibited by law.

Design:
"Imagine – Blue"



Website Customization Checklist

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**

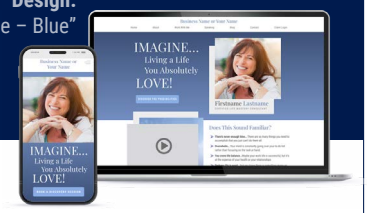
Photo

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

©Mary Morrissey® • Brave Thinking® Institute • www.BraveThinkingInstitute.com • All rights reserved • Unauthorized duplication is prohibited by law.



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):

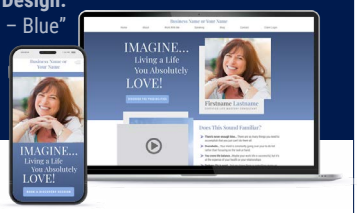
Testimonial Credit:

Webmaster – Update Testimonials on these pages:

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

Delete any unused placeholder testimonials.

©Mary Morrissey® • Brave Thinking® Institute • www.BraveThinkingInstitute.com • All rights reserved • Unauthorized duplication is prohibited by law.



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

---

☐ **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: _____

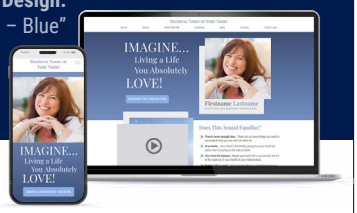
Coach's Name

Webmaster: Update placeholder testimonials and delete any unused

©Mary Morrissey® • Brave Thinking® Institute • www.BraveThinkingInstitute.com • All rights reserved • Unauthorized duplication is prohibited by law.

Website Customization Checklist

Design:
"Imagine – Blue"



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**

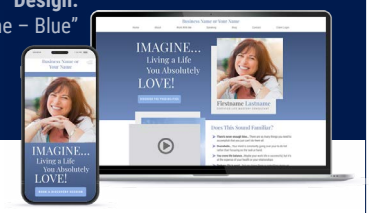
Webmaster: Update Phone number(s)

☐ **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.

©Mary Morrissey® • Brave Thinking® Institute • www.BraveThinkingInstitute.com • All rights reserved • Unauthorized duplication is prohibited by law.

Design:
"Imagine – Blue"



Website Customization Checklist

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.*

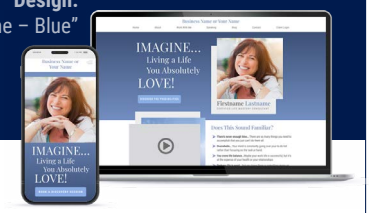
Webmaster: Paste the Inline Embed Code for the Calendly Account here:

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

©Mary Morrissey® • Brave Thinking® Institute • www.BraveThinkingInstitute.com • All rights reserved • Unauthorized duplication is prohibited by law.

Website Customization Checklist

Design:
"Imagine – Blue"



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.

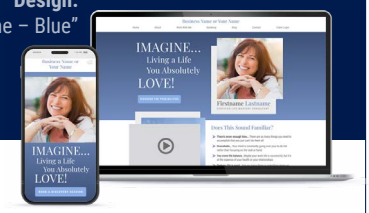
TERMS AND CONDITIONS PAGE

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

- 1st paragraph
- Under Intellectual Property heading

©Mary Morrissey® • Brave Thinking® Institute • www.BraveThinkingInstitute.com • All rights reserved • Unauthorized duplication is prohibited by law.

Design:
"Imagine – Blue"



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

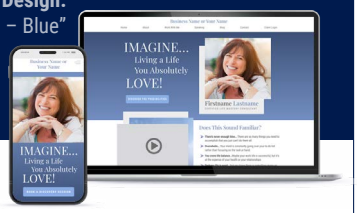
B) **How to Password Protect Pages –** short video tutorial: https://vimeo.com/920835006/29a44519e5

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.

©Mary Morrissey® • Brave Thinking® Institute • www.BraveThinkingInstitute.com • All rights reserved • Unauthorized duplication is prohibited by law.

Design:
"Imagine – Blue"



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.

Hiring a Professional

SOME HIRING CHOICES:

» View Some Support Options Here

REQUESTING A PRICE QUOTE:

If you hire a professional, they will want to understand the scope of work before they give you a price. For your convenience, we have created a form **"Scope of Work – Request for Price Quote"** which is an itemized list of services that you can submit when requesting a price quote on the task. Mark any or all tasks you would like your professional to perform and provide it to the professional so they can give you an accurate price for the services requested.

» Download the Form Here

AFTER YOU HIRE A PROFESSIONAL:

You have 2 options for creating accounts with the necessary 3rd party services (GoDaddy, Google Workspace, Email Broadcast Provider, Calendly) which are:

- Have your professional create the account (including login and password) on your behalf
- Setting up the account yourself and providing your professional the login and password so they can perform the necessary services you have hired the for.

In either instance, they will need some information from you in order to complete your request. We have included a sheet on the next page where you can record the appropriate information (email address, your login and password).

• Complete this Document and provide ALL pages to the professional you hire.

Believing In You!

Mat, Lauren and Your Life Coach Certification Team

©Mary Morrissey® • Brave Thinking® Institute • www.BraveThinkingInstitute.com • All rights reserved • Unauthorized duplication is prohibited by law.

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.

©Mary Morrissey® • Brave Thinking® Institute • www.BraveThinkingInstitute.com • All rights reserved • Unauthorized duplication is prohibited by law.