

# The Solo Nutritionist's Practice Software Checklist

25 vendor-neutral questions to ask before you choose a platform

**How to use this:** Work through this before starting a trial or committing to a subscription. Mark each question **Must have**, **Nice to have**, **Not needed yet**, or **Need to investigate**. Your answers become the criteria you use to compare any platform.

**Important:** This is a workflow and business-planning tool, not medical, legal, privacy, security, clinical, or regulatory advice. Check your own professional obligations and local requirements before selecting a system.

## 01 Practice and priorities

### 1 What repeated administrative task creates the most friction each week?

*Examples: chasing forms, booking, reminders, payment follow-up, notes, check-ins, or resource delivery.*

☐ Must have ☐ Nice to have ☐ Not needed yet ☐ Need to investigate

### 2 How do I deliver my services today?

*Consider consultations, packages, recurring coaching, meal plans, check-ins, group programmes, or a mix.*

☐ Must have ☐ Nice to have ☐ Not needed yet ☐ Need to investigate

### 3 How many active clients do I manage now, and what volume do I expect within 12 months?

*Choose for the practice you have now, with reasonable room to grow.*

☐ Must have ☐ Nice to have ☐ Not needed yet ☐ Need to investigate

### 4 Which tools already work well enough that I do not need to replace them?

*Examples: calendar, video calls, accounting, payments, forms, email, or meal-planning tools.*

☐ Must have ☐ Nice to have ☐ Not needed yet ☐ Need to investigate

### 5 What is my realistic monthly budget, including setup time and add-ons?

*Include subscription costs, transaction fees, integrations, training, and time to configure the first useful workflow.*

☐ Must have ☐ Nice to have ☐ Not needed yet ☐ Need to investigate

## 02 New-client onboarding

### 6 Can a prospective client enquire or book without unnecessary manual back-and-forth?

*Think about the first step in the client journey.*

☐ Must have ☐ Nice to have ☐ Not needed yet ☐ Need to investigate

### 7 Can I collect the intake information, agreements, consent, and prep details I need before session one?

*List the documents and information your own process requires.*

☐ Must have ☐ Nice to have ☐ Not needed yet ☐ Need to investigate

### 8 Can I see whether required forms or pre-session tasks have been completed?

*You need a clear way to identify what is still outstanding.*

☐ Must have ☐ Nice to have ☐ Not needed yet ☐ Need to investigate

### 9 Can appropriate reminders be sent for incomplete forms or upcoming appointments?

*Decide which reminders should be automatic and which should stay personal.*

☐ Must have ☐ Nice to have ☐ Not needed yet ☐ Need to investigate

### 10 Can I create a consistent welcome process that tells a new client exactly what happens next?

*Consider confirmation, prep instructions, payment expectations, access details, and first-session guidance.*

☐ Must have ☐ Nice to have ☐ Not needed yet ☐ Need to investigate

### 03 Scheduling, follow-up, and administration

**11 Can clients book, reschedule, or cancel appointments in a way that fits my policies?**

*Check whether the system supports your timing, cancellation, and availability rules.*

☐ Must have ☐ Nice to have ☐ Not needed yet ☐ Need to investigate

**12 Can appointment reminders be delivered through channels that work for my clients and practice?**

*Consider email, calendar notifications, text messaging where available and appropriate, or other approved methods.*

☐ Must have ☐ Nice to have ☐ Not needed yet ☐ Need to investigate

**13 Can I see each client's status from enquiry through onboarding, appointments, follow-up, and next action?**

*A useful system should make outstanding actions visible.*

☐ Must have ☐ Nice to have ☐ Not needed yet ☐ Need to investigate

**14 Can I create follow-up tasks, reminders, or recurring check-ins after a session?**

*This matters for continuity and for not relying on memory alone.*

☐ Must have ☐ Nice to have ☐ Not needed yet ☐ Need to investigate

**15 Does the system support the way I need to create, find, update, and retain client notes?**

*Test how quickly you can locate information before and after an appointment.*

☐ Must have ☐ Nice to have ☐ Not needed yet ☐ Need to investigate

### 04 Client experience and service delivery

**16 Will clients have one clear place to find appointments, forms, messages, resources, and next steps?**

*A simpler client journey can reduce confusion and repeat questions.*

☐ Must have ☐ Nice to have ☐ Not needed yet ☐ Need to investigate

**17 Can I deliver meal plans, resources, action plans, recipes, or programme materials in a way that fits my service?**

*Only prioritise functions you genuinely use in your practice.*

☐ Must have ☐ Nice to have ☐ Not needed yet ☐ Need to investigate

**18 Can the system support my coaching rhythm?**

*Consider check-ins, progress tracking, programme milestones, recurring tasks, and resource delivery.*

☐ Must have ☐ Nice to have ☐ Not needed yet ☐ Need to investigate

**19 Is the client experience straightforward on a mobile phone?**

*Test booking, form completion, login, messages, accessing a resource, and rescheduling.*

☐ Must have ☐ Nice to have ☐ Not needed yet ☐ Need to investigate

**20 Can I automate repetitive admin without making my service feel generic or impersonal?**

*Identify what should be automated and what should remain a personal interaction.*

☐ Must have ☐ Nice to have ☐ Not needed yet ☐ Need to investigate

## 05 Business fit, privacy, and exit planning

### 21 Does the pricing structure fit my current service model and client volume?

*Check plan limits, billing terms, add-ons, transaction fees, users, and features included at the plan you would actually buy.*

☐ Must have ☐ Nice to have ☐ Not needed yet ☐ Need to investigate

### 22 How long will it take to set up the first useful workflow?

*Define the minimum viable setup: booking, forms, client record, reminders, welcome process, first appointment.*

☐ Must have ☐ Nice to have ☐ Not needed yet ☐ Need to investigate

### 23 What client information will be collected, stored, processed, or shared — and can I control access?

*Review the provider's privacy, security, permissions, and data-processing information against your own obligations.*

☐ Must have ☐ Nice to have ☐ Not needed yet ☐ Need to investigate

### 24 Can I export my client data and records in a usable format if I change systems?

*Check exports for notes, forms, files, appointments, and records, including restrictions after cancellation.*

☐ Must have ☐ Nice to have ☐ Not needed yet ☐ Need to investigate

### 25 What evidence do I still need before I commit?

*List the trial workflows, support questions, integrations, pricing details, privacy documentation, export process, and cancellation terms you need to verify.*

☐ Must have ☐ Nice to have ☐ Not needed yet ☐ Need to investigate

## Twenty-five questions, one purpose

Each section builds on the last: your priorities set the baseline, onboarding and day-to-day admin test whether a platform fits how you actually work, and the final section checks that the business terms — pricing, privacy, and your exit — hold up before you sign anything. Turn the page for a one-page tool that turns your answers into a next step.

# One-Page Decision Tool

Turn your answers into a practical next step. This page is vendor-neutral: use it to compare any platform, improve a manual workflow, or decide you don't need new software yet.

| My practice-software requirements | Must have                | Nice to have             | Not needed yet           | Investigate              |
|-----------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Online booking                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Intake forms and consent          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Incomplete-form reminders         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Appointment reminders             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Client records and notes          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Client portal                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Meal plans or resources           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Recurring check-ins               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Payments or packages              | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Automations                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Mobile client experience          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Team or assistant access          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Integrations                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Data export                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Privacy and access controls       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

## My decision summary

My biggest workflow problem is: \_\_\_\_\_

My top three must-have capabilities are: 1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_

The first workflow I will test or improve is: \_\_\_\_\_

The evidence I still need before choosing a platform is: \_\_\_\_\_

My next practical action is:

☐ Improve one workflow manually

☐ Compare platforms

☐ Start a structured trial

☐ Watch a setup tutorial

☐ Ask a provider a question

## Decision rule

Choose the smallest system — or process change — that reliably improves your most important repeated workflow today. Do not select a platform solely because it has the longest feature list.

## What should you do next?

**Still using spreadsheets, forms, email, and messaging apps?**  
→ Start with the New-Client Onboarding Workflow.

**Comparing software options?**  
→ Use your must-have list with the Software Comparison Guide.

**Already using a platform?**  
→ Watch the Setup Tutorials and improve one workflow at a time.

**Need help clarifying your requirements?**  
→ Revisit your top three must-haves before beginning another trial.