

Common Failure Patterns

The Perfectionist Trap: Coaches spend weeks customizing every dropdown and color-coding system before entering a single client. The template works because of consistent use, not perfect setup. Start with the default configurations and modify based on actual experience, not theoretical preferences.

Data Entry Discipline Decay: Everyone starts religiously updating their sheets, then gradually becomes sporadic. The quality degradation happens slowly enough that you don't notice until your dashboard metrics become meaningless. Set a specific day and time for updates—most successful coaches do this Friday afternoons when they're naturally reviewing the week anyway.

Vanity Metrics Obsession: New users often want to track everything—client satisfaction surveys, referral sources, session ratings, revenue per client. The six key metrics exist because they predict practice sustainability. Additional tracking usually creates data noise that obscures rather than clarifies operational decisions.

Over-Engineering Instead of Using: Tech-savvy coaches frequently get distracted building elaborate formulas and conditional formatting instead of actually using the system to manage their practice. The template's power comes from consistent application, not sophisticated customization.

Analysis Paralysis on Low Scores: When metrics drop below targets, many coaches spend excessive time analyzing why instead of taking corrective action. A quality score below 4.0 means schedule check-ins with those clients immediately—don't spend three days theorizing about engagement patterns.