FREE TRADE PLAYBOOK

Consultants & Coaches: the top time-savers

5–10
hours per client
top claim

6 AI tools that can take busywork off consultants and coaches. What each one does, what it costs, how to start, and where we got the facts.

Built from 13 consultants and coaches listings in the BusyWorkBots directory, as of November 1, 2026. 2 of them show a sourced hours number.

#	Tool	What it does	Hours saved	Price	Setup
1	**5-Minute Client Onboarding** Email follow-up	One 60-step Zap sends forms, makes folders and tasks, and sends a welcome kit.	5–10 hours per client	Multi-step Zaps from $19.99/mo More on card	Needs setup
2	**New Client Onboarder** Email follow-up	Sends each new client a welcome email, a shared folder, and a booking link.	13.8 hours a month	Multi-step Zaps from $19.99/mo More on card	Medium
3	**Acuity Scheduling** Booking	Booking page with intake forms, payments, and reminders.	Not stated	From $16/mo billed yearly	Easy
4	**Bonsai** Billing and invoices	Proposals, contracts, time tracking, and invoices.	Not stated	From $9/user/mo	Easy
5	**Clip Bot** Social posts	Finds the best moments in a long recording and cuts them into short captioned clips. Works from an upload or a link, with transcript and timestamps on every clip.	Not stated	Comes with Grok Bot plan	Easy
6	**Fathom** Meeting notes	AI notetaker that records and sums up Zoom, Meet, and Teams calls.	Not stated	Team from $15/user/mo billed yearly More on card	Easy

How we picked these 6. We take up to 3 listings that have a sourced hours number, biggest first. Then one listing per chore, easiest setup first. We make sure you see both free DIY templates and software when the trade has both. We do not test every tool.

How to read hours. Hours are the numbers the maker, an owner, or a case study gave. The source is on each card. “Not stated” means we have no sourced number, so we do not guess one.

How to read price. Price comes from each listing. “Check site” means we could not find a public price. Always confirm on the maker’s site.

TOOLS 1–3 OF 6

1 5-Minute Client Onboarding

Email follow-up | Setup: Needs setup | Free DIY template

What it does One 60-step Zap sends forms, makes folders and tasks, and sends a welcome kit.

Good if Onboarding eats your whole day?

Hours saved 5–10 hours per client Author's own claim.

Price **Multi-step Zaps from $19.99/mo (Zapier Pro, billed yearly; $29.99/mo billed monthly); a limited free plan (two-step Zaps only) is also listed**

Setup Start small: trigger on signed contract, make the folder, send the welcome email. Add steps later.

Source: zapier.com/blog/how-our-agency-uses-zapier-to-onboard-clients
Our page: busyworkbots.com/bots/5-minute-client-onboarding/

2 New Client Onboarder

Email follow-up | Setup: Medium | Free DIY template

What it does Sends each new client a welcome email, a shared folder, and a booking link.

Good if Same setup steps for every new client?

Hours saved 13.8 hours a month Author's claim; the article's own example, not measured.

Price **Multi-step Zaps from $19.99/mo (Zapier Pro, billed yearly; $29.99/mo billed monthly); a limited free plan (two-step Zaps only) is also listed**

Setup

1. Trigger on payment or form.
2. Send welcome email.
3. Make Drive folder.
4. Make project.
5. Send booking link.
6. Slack heads-up.

Source: accelrio.com/automate-client-onboarding-zapier
Our page: busyworkbots.com/bots/new-client-onboarder/

3 Acuity Scheduling

Booking | Setup: Easy | Software or service

What it does Booking page with intake forms, payments, and reminders.

Good if Back-and-forth to book sessions?

Hours saved Not stated

Price **From $16/mo billed yearly** ($20 monthly)

Setup

1. Start the trial.
2. Add your session types.
3. Share your booking link.

Source: acuityscheduling.com/signup.php Our page: busyworkbots.com/bots/acuity-scheduling/

TOOLS 4–6 OF 6

4 Bonsai

Billing and invoices | Setup: Easy | Software or service

What it does Proposals, contracts, time tracking, and invoices.

Good if Proposals, time, and invoices in different apps?

Hours saved Not stated

Price **From $9/user/mo** (billed yearly)

Setup
1. Start the trial.
2. Add a client.
3. Send a proposal.

Source: hellobonsai.com/pricing Our page: busyworkbots.com/bots/bonsai/

5 Clip Bot

Social posts | Setup: Easy | Software or service

What it does Finds the best moments in a long recording and cuts them into short captioned clips. Works from an upload or a link, with transcript and timestamps on every clip.

Good if Long videos sitting unused?

Hours saved Not stated

Price **Comes with Grok Bot plan**

Setup Open the link and click Add to put this ready-made bot on your Grok Bot. Connect the apps it asks for. It drafts; you approve before anything sends.

Source: x.ai/bot/marketplace/bots/clip-bot Our page: busyworkbots.com/bots/clip-bot/

6 Fathom

Meeting notes | Setup: Easy | Software or service

What it does AI notetaker that records and sums up Zoom, Meet, and Teams calls.

Good if Writing notes after every call?

Hours saved Not stated

Price **Team from $15/user/mo billed yearly ($19 monthly, 2-user minimum); Premium $16/mo billed yearly for one person; a limited free plan is also listed**

Setup
1. Make a free account.
2. Connect your calendar.
3. Let it join your next call.

Source: fathom.ai/pricing Our page: busyworkbots.com/bots/fathom/

START HERE

Your first 7 days

You do not need all 6 tools. Pick one chore, try one tool, and count the hours before and after.

Day 1	**Count your chores.** Write down the 3 chores that eat the most time. Next to each, write the hours it takes in a normal week. This is your starting line.
Day 2	**Pick one tool.** Start with just one. On this list, Acuity Scheduling is the easiest to set up (setup: Easy). Pick the one that fits your biggest chore, not the one with the biggest hours number.
Day 3	**Check price and claims.** Open the source link on the tool's card. Ask the maker for the price in writing. Remember: hours saved are the maker's or owner's numbers, not ours.
Day 4	**Try it small.** Use it on a few real jobs only. If it writes messages, read every one before it goes out.
Day 5	**Fix the words.** Change anything that does not sound like you. Write down every mistake it made.
Day 6	**Run it for a normal day.** Keep a person ready to step in. Note how long the chore took this time.
Day 7	**Count again.** Compare to Day 1. Keep it, change it, or drop it. Then pick your next chore.

Test it before you buy it. Free one-page kits with questions to ask the maker, a test script, and a 7-day trial plan:

- Scheduling and booking kit busyworkbots.com/test-kits/scheduling-booking/
- AI meeting notes kit busyworkbots.com/test-kits/meeting-notes/

How to count your hours: for one normal week, write down each time you do the chore and how many minutes it took. Add them up.

NEXT STEP

Not sure where to start? We can help.

Free Busywork Audit

Pick your industry and the chores that eat your week. Get a one-page report of tools from our directory, with the hours each listing reports. Free. No email needed.

Take the free audit →

https://busyworkbots.com/free-audit/

Want it set up for you?

TimeGentic runs BusyWorkBots. Book a Free Profit Leak Check and we will look at where your business loses time and money.

Book Free Profit Leak Check →

https://timegentic.ai

Heads up: TimeGentic LLC runs BusyWorkBots, so the Profit Leak Check is our own service. Some links on busyworkbots.com are affiliate links; the links in this PDF go to each maker's own pages. We do not test every tool, and hours saved are the numbers given by each source. Prices change, so check the maker's site.

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