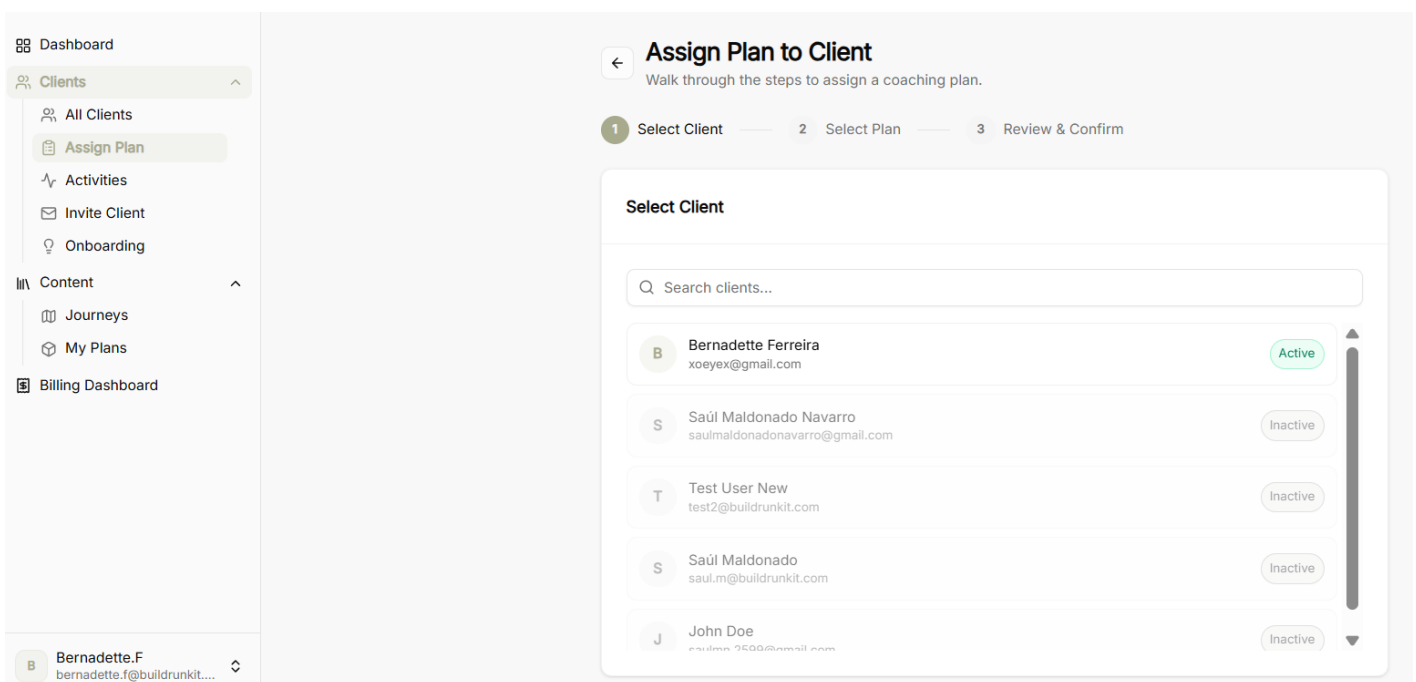


Mentor Alliance Business Coach Kit – Assign Plan to Client

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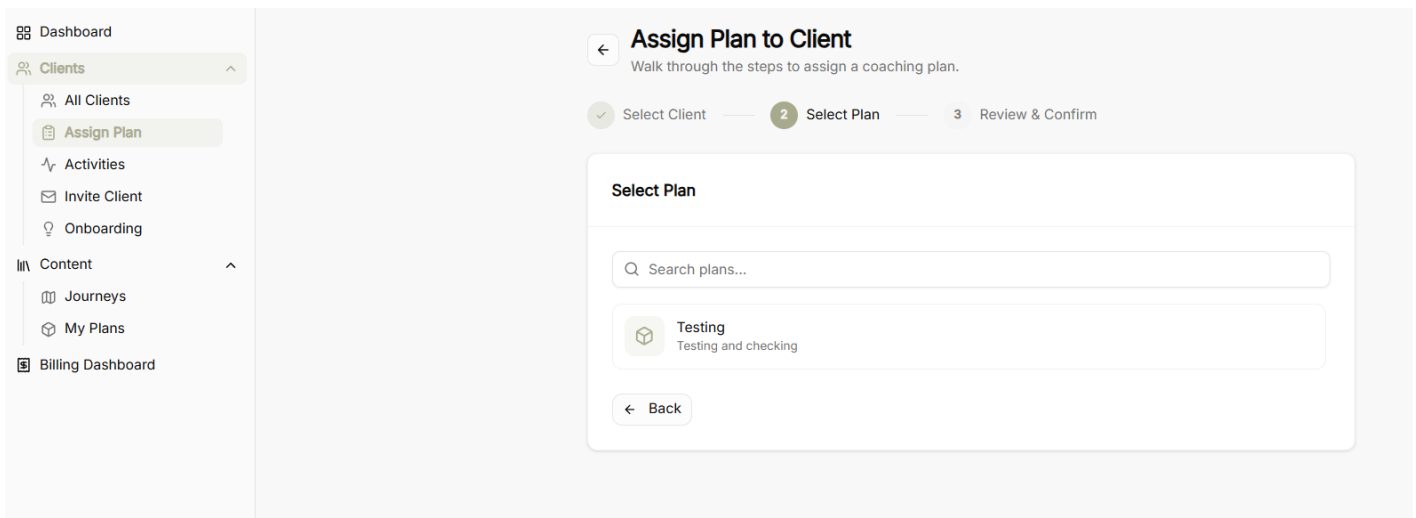


The **Assign Plan to Client** tool provides a guided step-by-step wizard to attach structured coaching plans and business journeys directly to a client's workspace.

Step 1: Select Client

- **Search Bar:** Quickly search and filter through enrolled clients by name or email.
- **Client Selection List:** Displays registered coaching clients alongside their account status badges (*Active* or *Inactive*).
- **Selection Action:** Select the intended client to highlight them and proceed to plan selection.

Step 2: Select Plan



- **Search Plans:** Search bar to locate specific coaching plans saved in your **My Plans** library.
- **Plan Library List:** Displays custom coaching plans and blueprints created within the platform.
- **Navigation Controls:**
 - **Back Button:** Return to Step 1 to reselect or change the client.
 - **Plan Selection:** Click on the desired plan card to advance to final review.

Step 3: Review & Confirm

←

Assign Plan to Client

Walk through the steps to assign a coaching plan.

✓ Select Client

✓ Select Plan

3 Review & Confirm

Review & Confirm

Review the details below before confirming the assignment.

CLIENT

B

Bernadette Ferreira

Active

xoeyex@gmail.com

PLAN

Testing

Testing and checking

ⓘ

All journeys in this package will be assigned to the client. Their progress will be tracked from the start. You can revert this assignment at any time — client progress is always preserved.

← Back

✓ Confirm Assignment

- **Selected Client Summary:** Displays chosen client details, email address, and active account status.
- **Selected Plan Summary:** Displays the assigned plan title and description.
- **Assignment Operational Notice:** Explains that all journeys included in the package will be assigned to the client, with progress tracked from the start and full preservation of client data if reverted later.
- **Final Controls:**
 - **Back Button:** Return to previous steps to make adjustments.
 - **Confirm Assignment Button:** Finalize and activate the plan assignment for the client.

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