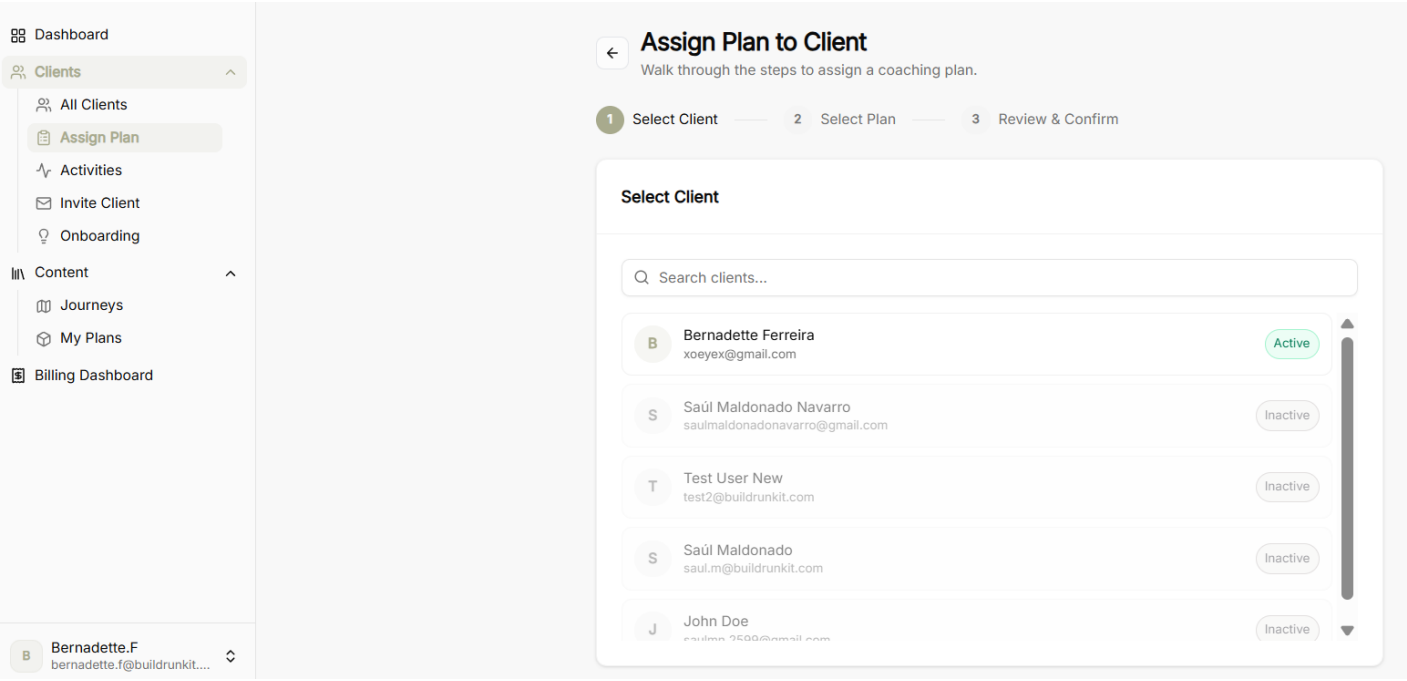
Mentor Alliance Business Coach Kit – Assign Plan to Client

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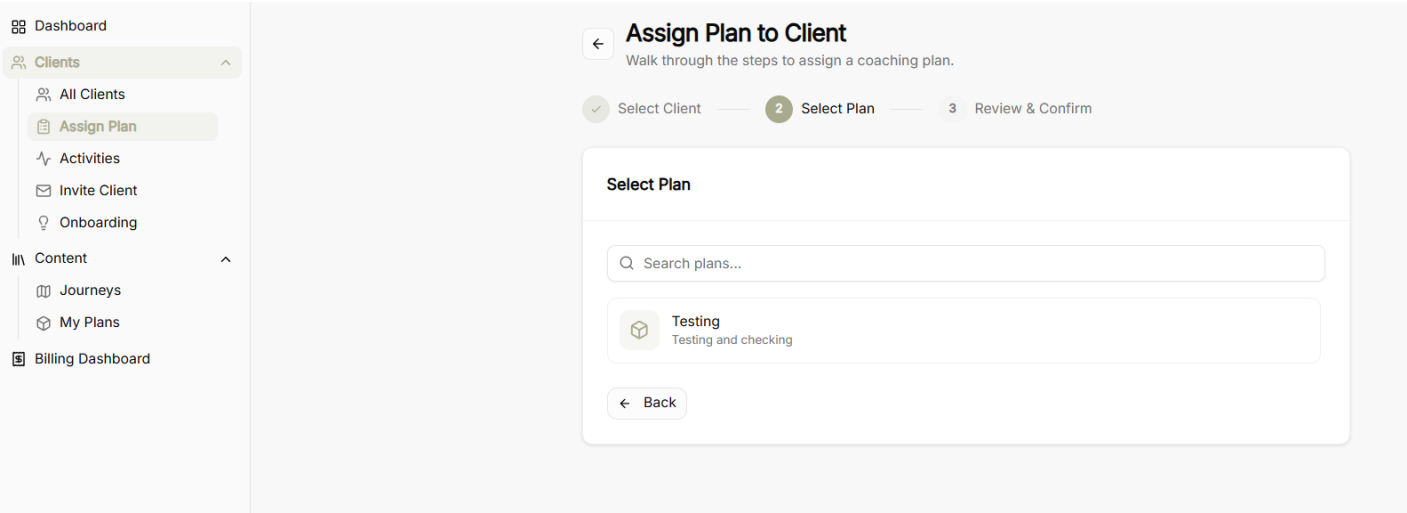


The **Assign Plan to Client** tool provides a guided step-by-step wizard to attach structured coaching plans and business journeys directly to a client's workspace.

Step 1: Select Client

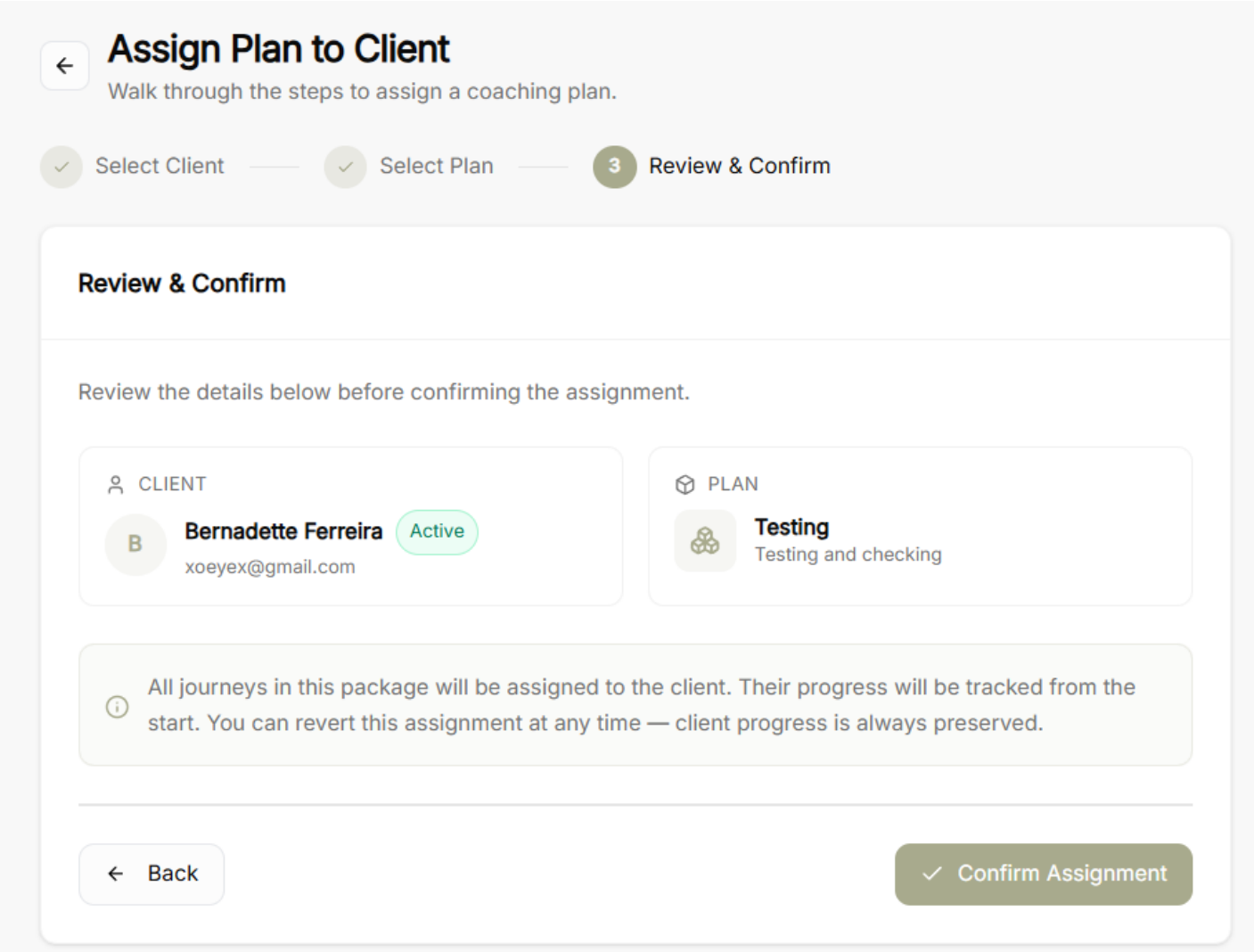
- **Search Bar**: Quickly search and filter through enrolled clients by name or email.
- **Client Selection List**: Displays registered coaching clients alongside their account status badges (*Active* or *Inactive*).
- **Selection Action**: Select the intended client to highlight them and proceed to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



- **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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