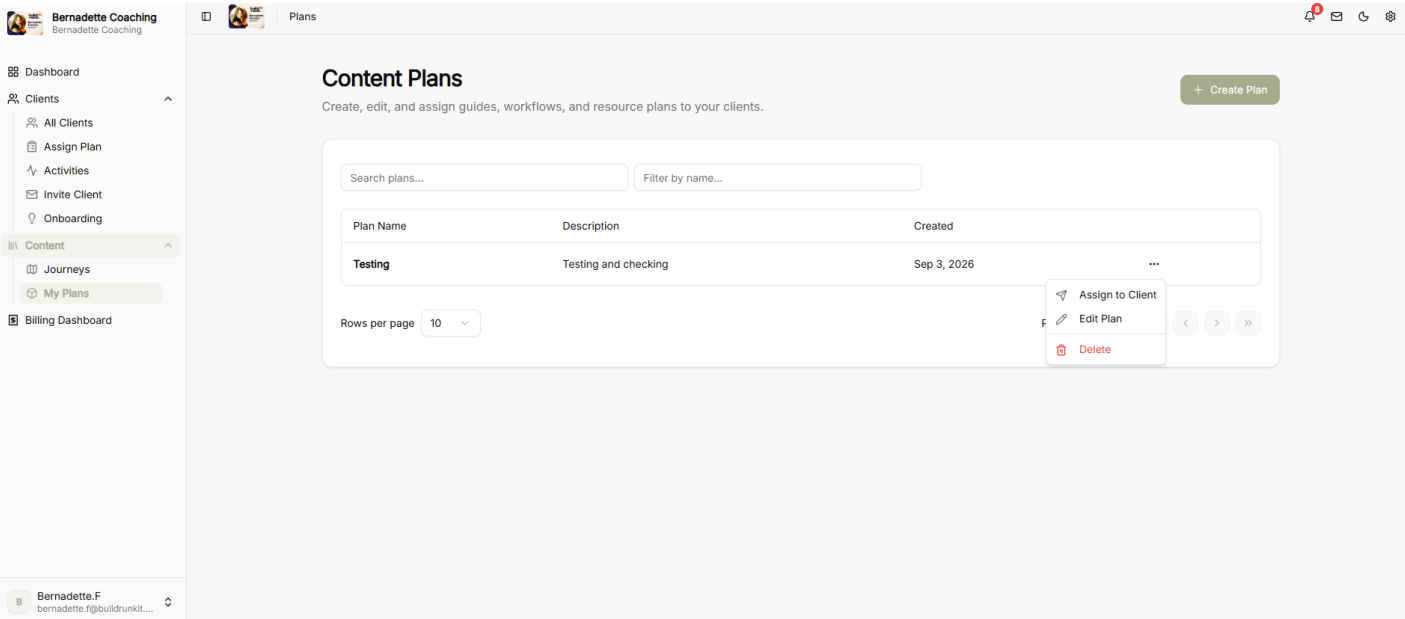


Mentor Alliance Business Coach Kit – My Plans

Mentor Alliance Business Coach Kit – My Plans



The **My Plans** module allows coaches to create, edit, assign, and customize content plans for client onboarding by combining custom journeys, pre-built templates, and file attachments.

Assigning a Plan

Assign Plan

Select a client to assign this plan to. Any journeys inside this plan will be initialized in their dashboard with initial progress.

Coaching Client

Select a client...

Cancel

Assign to Client

- **Assign Plan Modal:** Select a coaching client from the dropdown menu to assign a content plan.
- **Automatic Progress Tracking:** Assigning a plan initializes all included journeys directly on the client’s dashboard with initial progress tracking enabled.

Editing & Building Content Plans

Edit Content Plan

Add resources and journeys to compile a plan for client onboarding.

Plan Name *

Testing

Description

Testing and checking

Items

Combine custom journeys, pre-built templates, or document attachments.

+ Add Journey

+ Add File Attachment

Item #1

Template Journey

Creating Blueprint for Go-To-Market

Change

Preview

↑

↓

Cancel

Save Plan

Journey Library

My Journeys

Templates

Search templates...

Template Journey

Trust Signals for Your Business

A practical journey for making your business more trustworthy and easier to choose. You will audit the trust...

8 Stages • 0 Substages

+ Add to Plan

Template Journey

Business Model Canvas: Build Your Business...

A guided journey for mapping how your business creates value, serves customers, operates, and earns money. Yo...

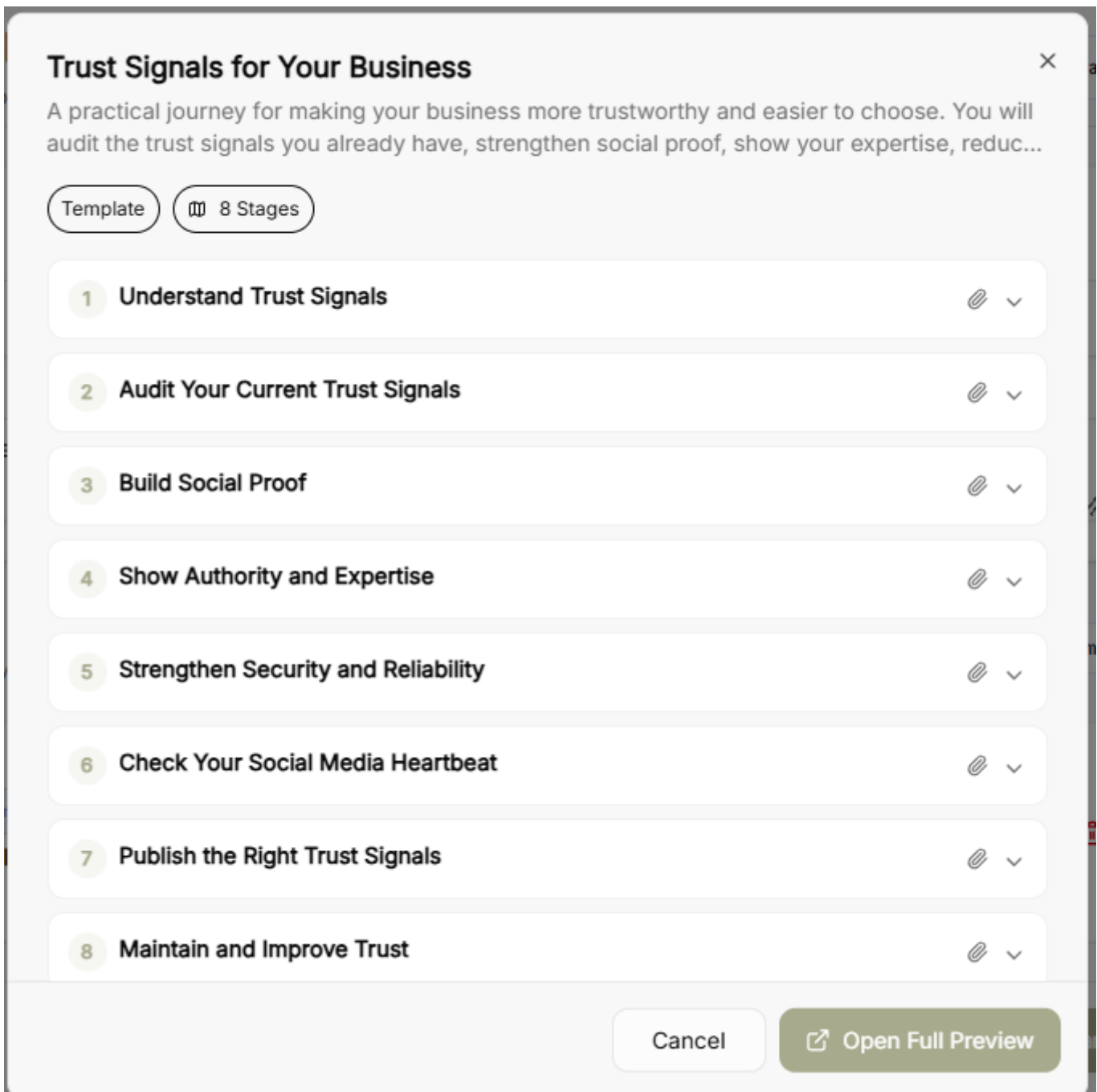
10 Stages • 0 Substages

+ Add to Plan

Template Journey

LeanStack: From Idea to Proof

A BuildRunKit validation journey based on Lean Canvas and the Running Lean methodology. This journey helps y...



- **Plan Details:** Define or update the mandatory **Plan Name** and **Description**.
- **Adding Content Items:**
 - **Add Journey:** Append journeys directly into the plan sequence.
 - **Add File Attachment:** Attach supplementary documents or resources.
- **Journey Library Side Panel:**
 - Toggle between **My Journeys** and **Templates** tabs to find relevant content.
 - Click + **Add to Plan** on any card to include it in the active plan.
 - Click the **Eye Icon** on any journey card in the library or item row to launch a quick preview popup.

- **Journey Quick Preview Modal:** Displays the journey's full stage breakdown, stage descriptions, and total stage counts with an option to **Open Full Preview**.
- **Item Management:** Reorder items in the plan using the up/down arrows or remove them using the trash icon.

Creating a New Plan

Edit Content Plan
Add resources and journeys to compile a plan for client onboarding.

Plan Name *
Testing

Description
Testing and checking

Items
Combine custom journeys, pre-built templates, or document attachments.

+ Add Journey Add File Attachment

Item #1 Template Journey
Creating Blueprint for Go-To-Market Change Preview

Cancel Save Plan

Journey Library

My Journeys Templates

Search templates...

Template Journey
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A practical journey for making your business more trustworthy and easier to choose. You will audit the trust...
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- **Plan Creator Canvas:** Set a **Plan Name** and **Description** on a fresh canvas.
- **Library & Attachment Options:** Open the **Journey Library** sidebar to browse through **My Journeys** or **Templates**, preview journeys via the eye icon, and attach required documents before clicking **Save Plan**.

Revision #1

Created 2026-09-30 11:16:13 UTC by Bernadette F

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