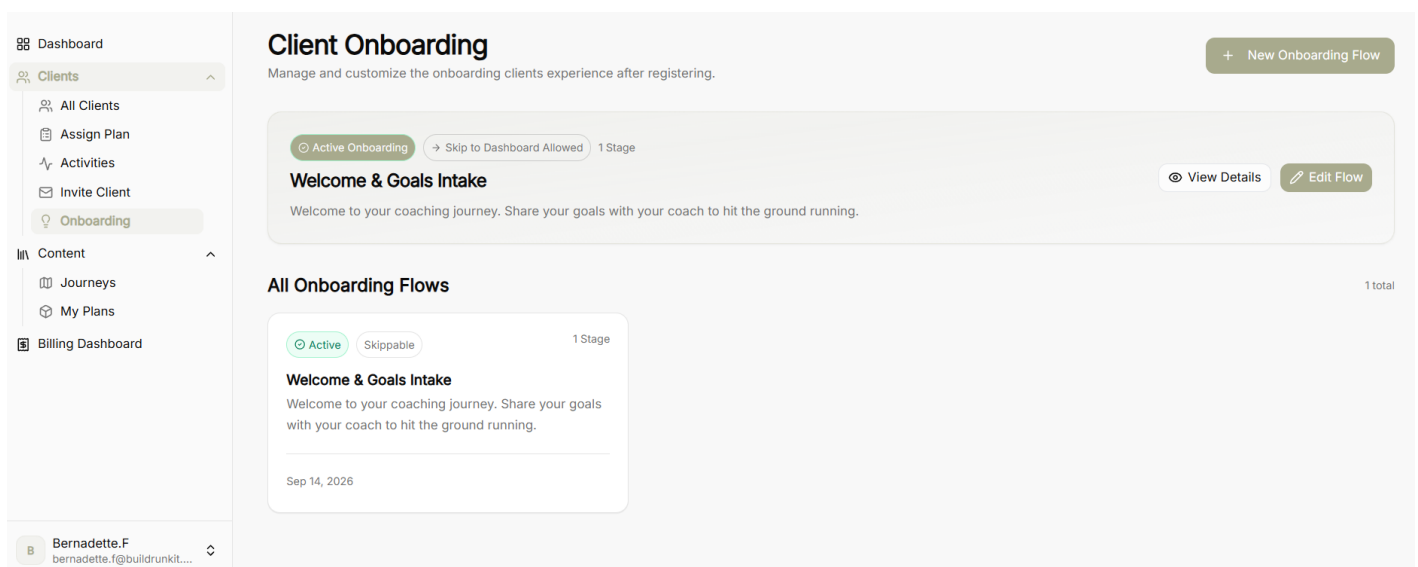


Mentor Alliance Business Coach Kit – Onboarding

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The **Onboarding** module enables coaches to create, edit, and manage customized first-touch onboarding experiences that new clients encounter immediately after registering.

Client Onboarding Overview Dashboard

- **Active Onboarding Banner:** Displays the designated primary onboarding sequence, highlighting total stage count, skippability permissions, and direct actions (**View Details** or **Edit Flow**).
- **New Onboarding Flow Button:** Launches the builder to design a brand-new onboarding experience.
- **All Onboarding Flows:** Library displaying all saved onboarding sequences with status tags (*Active*, *Skippable*) and creation dates.

View Details Screen

- **Flow Summary Header:** Displays total stage count, navigation behavior (*Flexible - Skip Allowed* or *Mandatory*), and original creation date.
- **Flow Stages & Steps Summary:** Renders a read-only breakdown of each stage, including stage titles, descriptions, and individual step prompts configured for the client intake.
- **Edit Flow Button:** Direct shortcut to open the editor and update the current flow.

Edit & Create Onboarding Experience Flow Builder

←

Active

Skip to Dashboard Allowed

Wellcome & Goals Intake

Edit Flow

Wellcome to your coaching journey. Share your goals with your coach to hit the ground running.

STAGES

1 Stage

NAVIGATION BEHAVIOR

Flexible (Skip Allowed)

CREATED DATE

Sep 14, 2026

Flow Stages & Steps

STAGE 1

Wellcome

Wellcome to Coaching

Let your coach know what you want to achieve.

Wellcome & Goals Intake

Wellcome! We've already notified your coach that you've signed up, and you'll get a follow up soon. In the meantime, tell us what your top goals are so your coach can hit the ground running:

←

Edit Onboarding Experience

Cancel

Design the first-touch journey clients encounter upon signing up.

General Settings

Experience Title *

Welcome & Goals Intake

Description / Subtitle

Welcome to your coaching journey. Share your goals with your coach to hit the ground running.

Allow Skip to Dashboard

Show a 'Skip to dashboard' button so clients can explore immediately.

☒

Set as Active Onboarding

Designates this flow as the primary journey for new client registrations.

☒

Onboarding Stages

Stages are presented sequentially in the Journey Engine.

+ Add Stage

STAGE 1

Stage Title *

Welcome to Coaching

Stage Description

Let your coach know what you want to achieve.

Cancel

Save Changes

- **General Settings:**

- **Experience Title:** Set or modify the public title for the onboarding flow.
- **Description / Subtitle:** Add guidance text explaining the purpose of the intake to new clients.
- **Allow Skip to Dashboard Toggle:** Enables or disables a "Skip to dashboard" button, allowing clients to bypass onboarding and explore the platform right away.
- **Set as Active Onboarding Toggle:** Designates the specific flow as the primary journey assigned to new client registrations.

Onboarding Stages:

Create Onboarding Experience

Cancel

Design the first-touch journey clients encounter upon signing up.

General Settings

Experience Title *

Welcome & Goals Intake

Description / Subtitle

Welcome to your coaching journey. Share your goals with your coach to hit the ground running.

Allow Skip to Dashboard

Show a 'Skip to dashboard' button so clients can explore immediately.

Set as Active Onboarding

Designates this flow as the primary journey for new client registrations.

Onboarding Stages

Stages are presented sequentially in the Journey Engine.

+ Add Stage

STAGE 1

Stage Title *

Welcome to Coaching

Stage Description

Let your coach know what you want to achieve.

Cancel

Create Onboarding

- **Stage Title & Description:** Configure distinct sequential stages to break intake steps into manageable parts.
- **Add Stage Button:** Append additional sequential stages to the onboarding journey.
- **Save / Create Controls:** Confirm updates with **Save Changes** or publish a new experience with **Create Onboarding**.

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