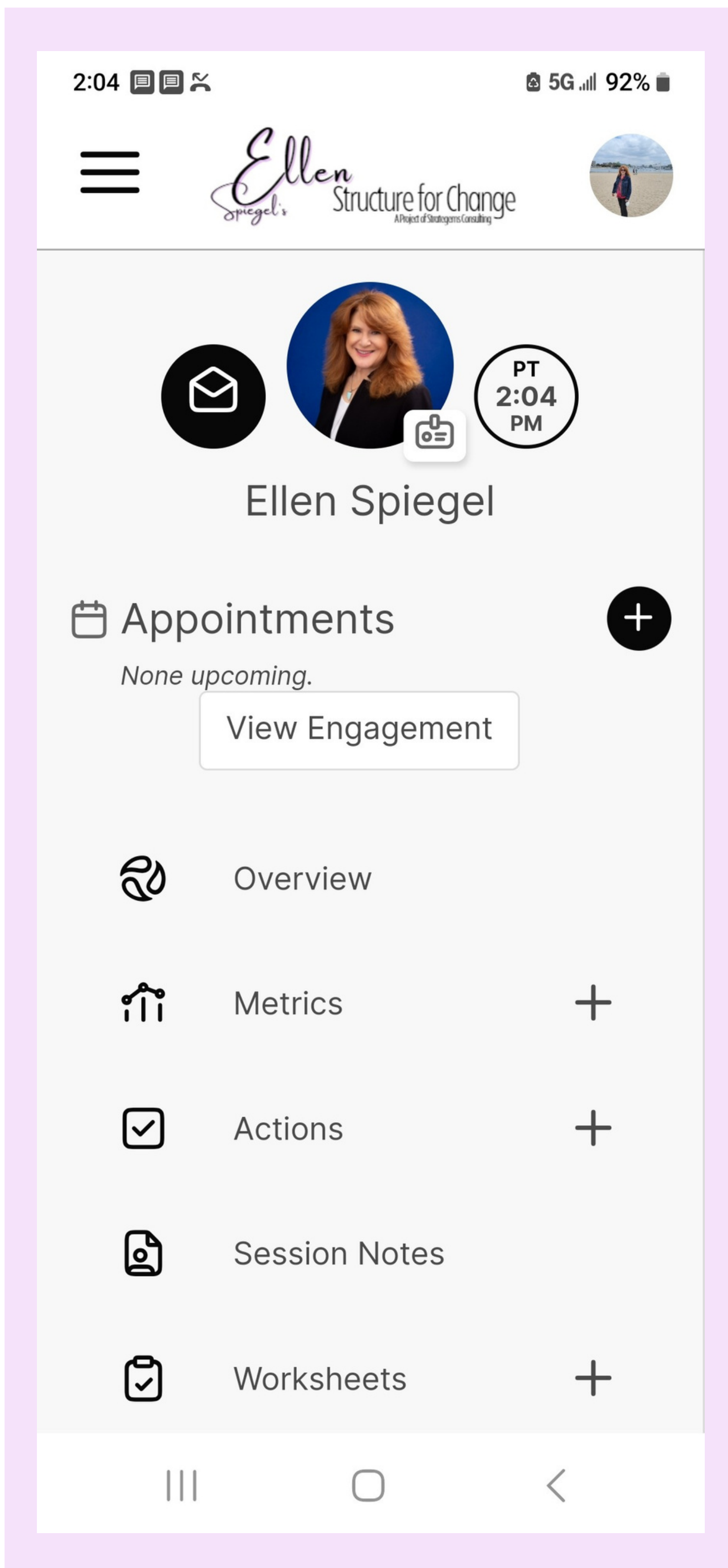


Example of How a Client's Coaching Portal Appears on Their Cell Phone



Shows who your coach is, what time it is for your coach, and allows you to connect

Allows you to see upcoming appointments and schedule/modify appointments

See an overview of all activity

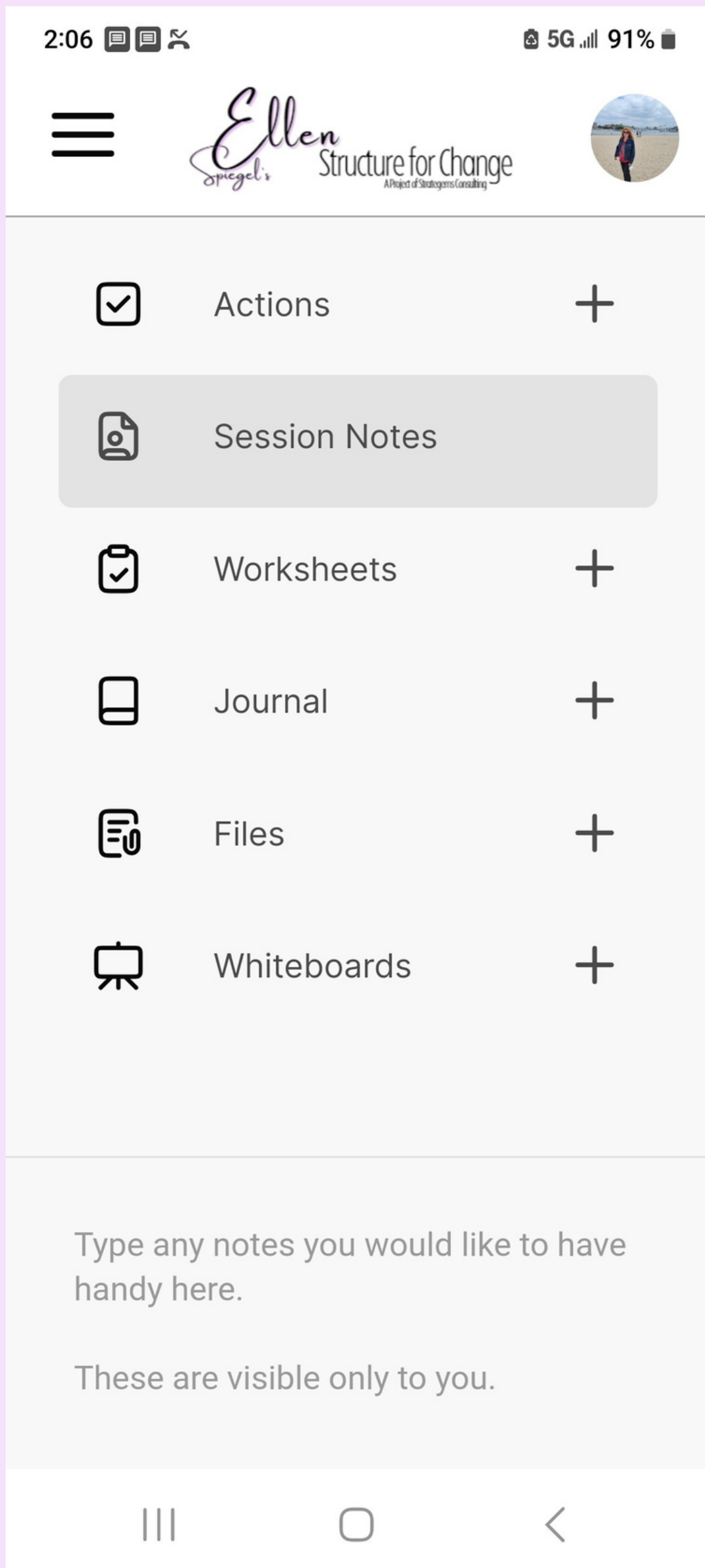
View your metrics, add data or add a new metric

View your actions, add data or add a new action

Access your Coach's notes from your previous sessions

Work on materials assigned to you

Example of How a Client's Coaching Portal Appears on Their Cell Phone (continued)



A journal of your journey

Access files that help you move forward

Keep brainstorming notes and/or other content top of mind


Example of a Setting Up An Appointment

2:40 5G 89%

Schedule an Appoint.




With:
Ellen Spiegel

What:

Date:
August 2023 

S	M	T	W	T	F	S
30	31	01	02	03	04	05
06	07	08	09	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	01	02
03	04	05	06	07	08	09

Time:

The client specifies what type of an appointment they wish to schedule

The client selects the date and time, and this is directly tied into my calendar

Example of a Setting Up An Appointment (Continued)

2:40 5G 89%

Schedule an Appoint.

9:00am 9:15am 9:30am

9:45am 10:00am 10:15am

10:30am 10:45am 11:00am

1:15pm 1:30pm 1:45pm

2:00pm

Reminders:

1 day

before via email

30 minutes

before via text

Add Reminder

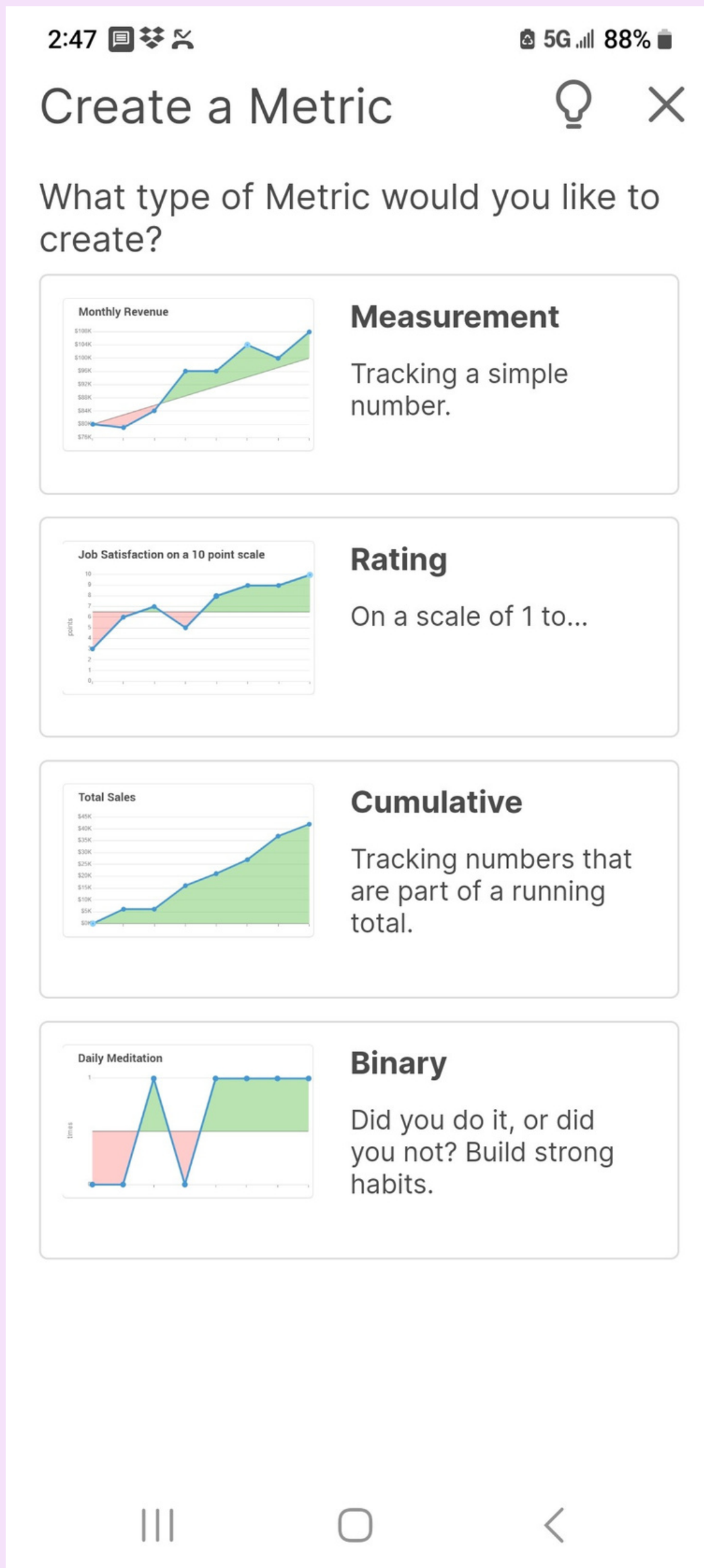
Schedule Appointment

My full availability is listed, maximizing client convenience

The client has the ability to specify how often they would like to be reminded of the appointment, as well as by what means

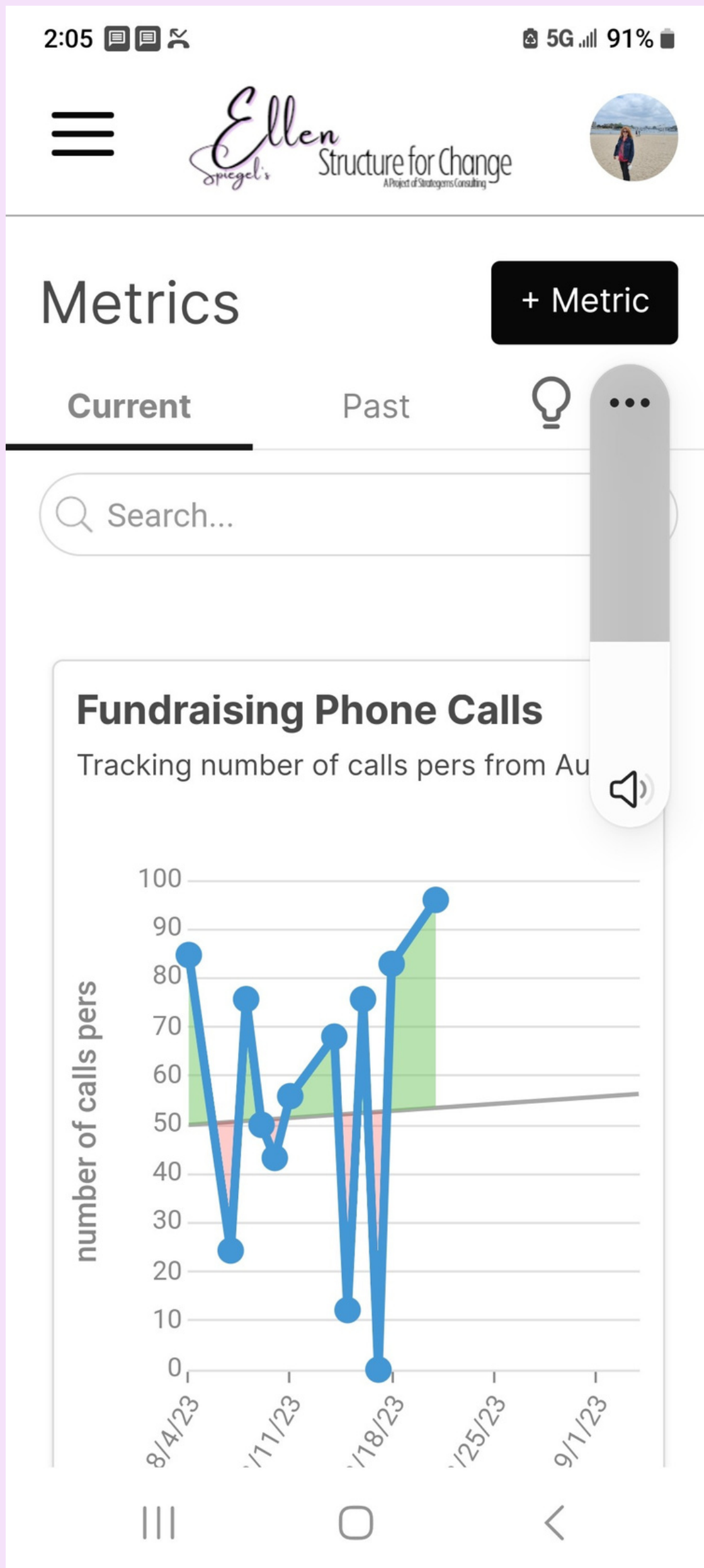
Metric Options

Everything in the portal is customizable and dedicated to helping the client achieve their goals.



Accountability is mission critical for goal attainment. Setting logical metrics allows the client (and Coach) to see if the client is on-track and gives the Coach the ability to help keep the client stay focused and on-track

Example of a Metric and the Value it Provides



Using metrics allows the client to see if they're on track. (Green is over goal, and red shows deficiency.)

Clients may also download metric data so it can be shared with their stakeholders.

Actions

"Actions" allows a client to track large projects (such as major campaign goals), as well as individual components of those projects

The screenshot shows the 'Plan an Action' screen in a mobile application. At the top, the status bar displays the time 2:49, signal strength, 5G connectivity, and 87% battery. The app title 'Plan an Action' is at the top left, with a close button (X) on the right. Below the title is a text input field for the 'Action:' name. Underneath is the 'Due:' section, which includes a date picker set to '8/24/23' and a time picker set to '7:00pm'. A 'Project?' section features a dropdown menu currently showing 'No, standalone action.'. Below that is a 'Reminders:' section with a numeric input set to '1' and a unit dropdown set to 'day'. At the bottom, there is a keyboard with various icons for emojis, voice recording, settings, search, and attachments.

The client is able to customize everything to meet their needs -- whether it's naming the action or specifying how and how often they wish to be reminded to take action so that they meet their goals.

Example of a Worksheet That's Integrated with YouTube

2:07 [notification icons]

5G [signal strength] 91% [battery]

Structure for Change ... ✕

Ellen Spiegel

7/25/23

The goals you set should be S.M.A.R.T.:

Specific

Measurable

Attainable/Achievable

Relevant

Time Bound

*(For information and tips on
Goal Setting, watch our [15-
minute Goal Setting video on
YouTube](#))*



What outcomes would you like to
achieve in the next 3-6 months, where
the work "outcomes" refers to a change



Questions?

Contact Ellen Spiegel

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