

Team Management Platform (POC)

Summary of Discovery

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Identified Pain Points

Overview

Our discovery session explored the current coaching process — from scheduling and sessions to follow-ups and KPI review. The findings highlight a highly manual, disconnected setup that limits visibility, accountability, and efficiency.

Disconnected Tools & Processes

01



Impact: High administrative load, duplicate effort, and lost opportunities for automation or insight.

No Centralised Accountability

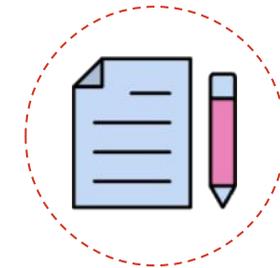
02



Impact: Limited accountability, reduced follow-through, and inconsistent client engagement.

Manual Note-Taking & Information Loss

03

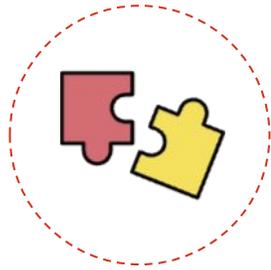


Impact: Inconsistent data and wasted admin time.

Identified Pain Points (Continued)

Fragmented Communication Channels

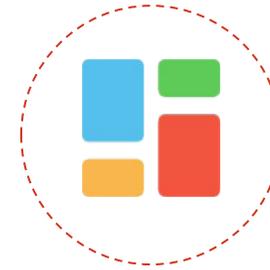
04



Impact: Lost context, unclear ownership, and missed opportunities for proactive support.

KPI Tracking Not Connected to Delivery

05



Impact: Minimal ability to correlate effort with outcomes or adjust focus areas.

Defined Key Metrics



01 Business-Level KPIs

- Leads
- Booking Percentage
- Arrival Percentage
- Impact %
- Total Revenue
- Action Items completed



02 Accountability Metrics

- Homework Completion %
- On-Time Completion Rate
- Follow-Up Response Rate
- Commitments Carried Forward



03 Engagement Metrics

- Reminder Response Rate

Identified User Roles

Purpose

To define the key roles involved in the coaching process, their permissions, and how they will interact with the ClickUp workspace. This ensures that every user only sees what they need, while workflows remain simple, secure, and scalable.



Coach (Primary User)

Role Summary:

The main workspace owner or team lead responsible for managing all clients, sessions, KPIs, and overall performance.

Goal:

Give the coach complete visibility and control while automating repetitive admin tasks (reminders, reports, notes tracking).



Client (End User / External)

Role Summary:

Each client will have a limited-access view to track their sessions, homework, and goals.

Goal:

Empower clients to self-manage accountability without exposing internal data or other clients' information.

Overview of Workflow Stages

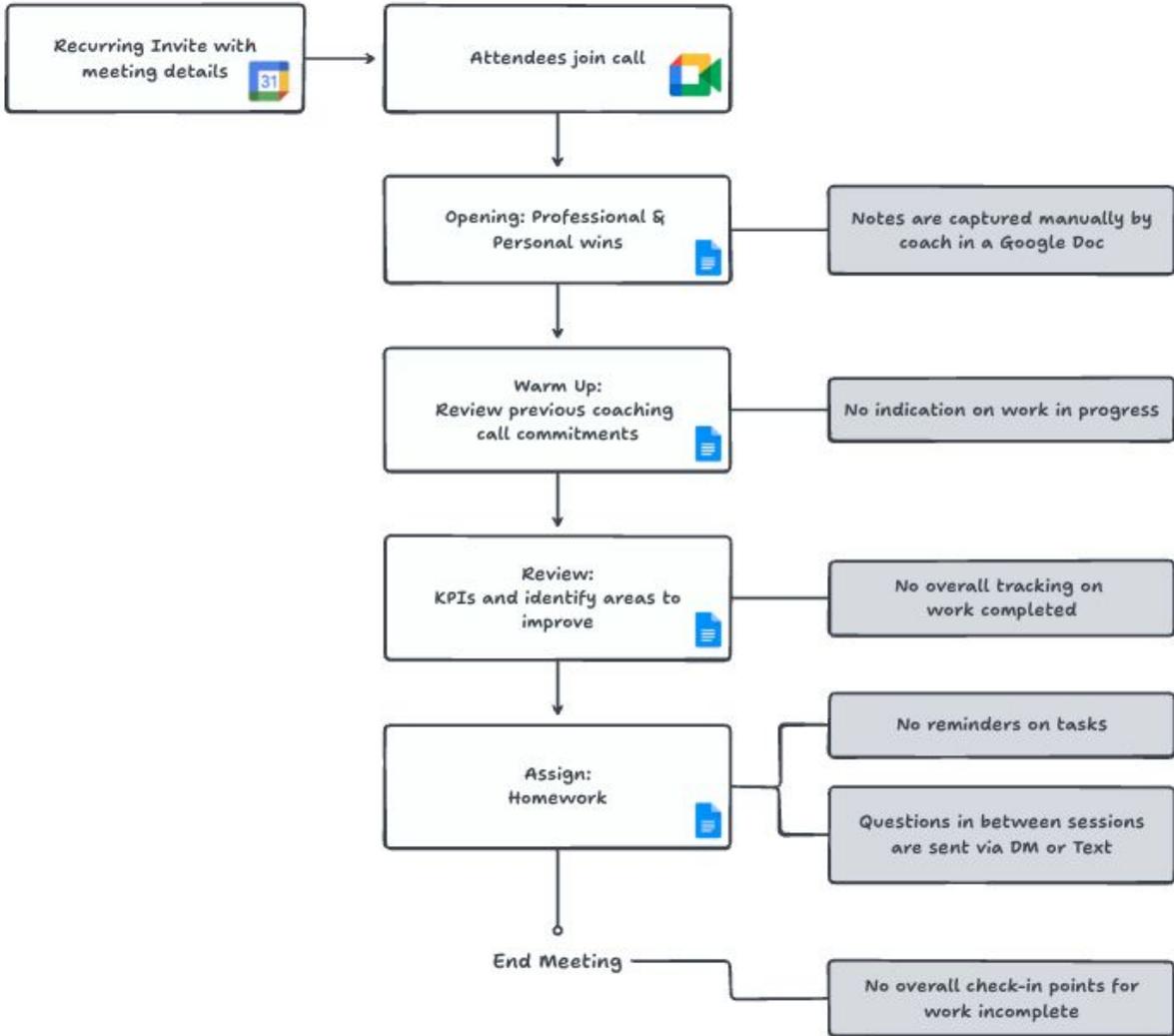
Purpose

To design the operational flow of the Coaching Management Platform — defining how data, tasks, and communication move through the system, and assigning the right permissions to each role.

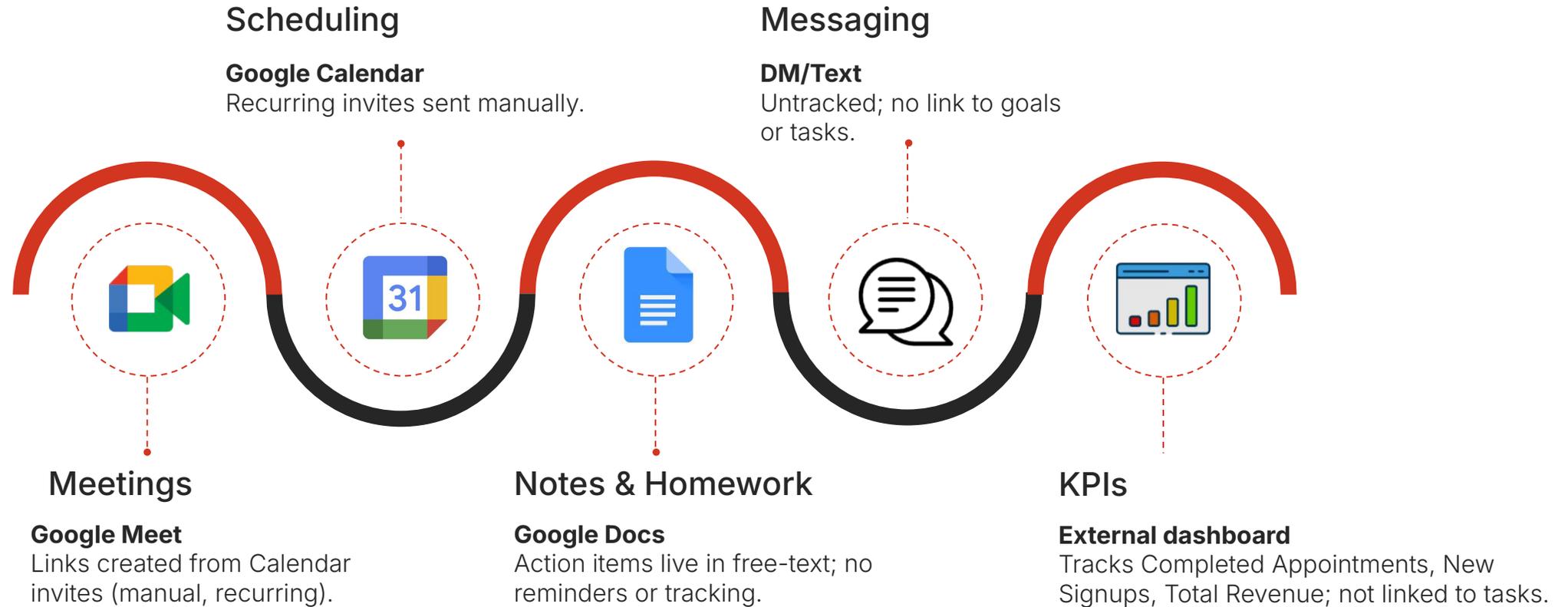
Stage	Description
1. Onboarding	Opportunity to streamline and optimise (Possible additional scope)
2. Development Template	Already exists in ClickUp. Opportunity to streamline and optimise (Possible additional scope).
3. Grand Opening Checklist	Opportunity to bring into ClickUp
4. Coaching Flow (Post-Launch)	→ After a launch, new team members are enrolled in coaching → Coaching sessions occur bi-weekly then monthly → Focus on sales training and performance tracking
2. Pre-Call Planning	Franchisee to answer questions ahead of the call
3. Coaching Delivery	Record session insights, assign homework
4. Accountability & Follow-up	Monitor progress and send reminders
5. KPI Tracking	Measure key metrics and link to dashboards
6. Review & Reporting	Summarise performance and next steps

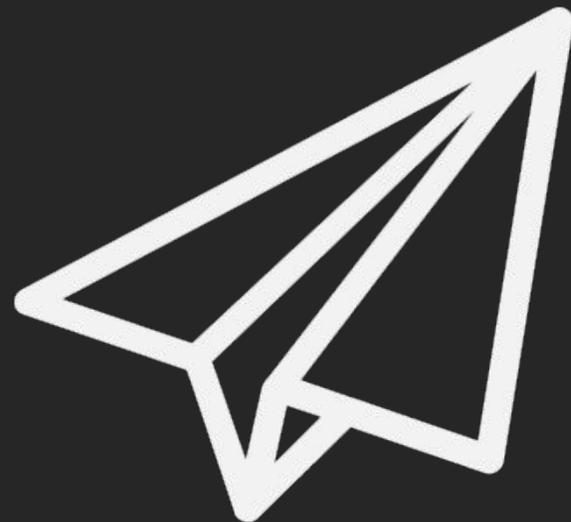
*Yellow Background indicates an opportunity to bring this process into ClickUp.

Overview of Workflow Stages



Confirmed Tech Stack





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 Empowering teams to simplify systems, automate processes, and scale effortlessly